Security to Wellbeing Framework:

A Tool for Direct Service Organizations
Moving Towards Social Change

December 7th, 2023
ABOUT THE

Building Movement Project

buildingmovement.org
Agenda

- Welcome and Overview of Webinar
- Summary of the Security to Wellbeing Framework
- Independent Sector: Nonprofits & Social Change Work
- Moderated Panel Discussion & Audience Q&A
- Closing & Next Steps
How was it created?
DIFFERENCE BETWEEN SECURITY & WELLBEING

SECURITY
DIFFERENCE BETWEEN SECURITY & WELLBEING
The AVC’s of Becoming a Service and Social Change Organization

**Internal Alignment**
Leadership, staff and board know the social change priorities for the organizations - engage and dedicate resources to them

**Client Voice**
Clients know that their experiences and opinions are important - they are centered and given agency to lead and shape social change work

**Collective Action**
Making connections and developing relationships in your ecosystem to leverage assets and build collective power
BECOMING A SERVICE & SOCIAL CHANGE ORGANIZATION

Providing Resources

Increase Organizational Social Change Capacity
- Constituent Engagement
- System & Policy Advocacy
- Staff & Stakeholder Training
- Power Shifting
- Build Skills & Processes
- Equity Justice Principles

Increase Client Social Change Capacity
- Self-advocacy
- Assume Leadership Roles
- Root Cause/System Analysis

Intentional Alliance Building

*This term can vary depending on your organization
Goals of the Tool

- Support organizations in starting or expanding their social change work in alignment with their own mission, values, and capacity.
- Deepen organization’s relationships with community stakeholders, staff & board, and the constituents they service.
- Tap into the power that organizations and their constituents have to affect broad social change in their communities.
- Shift the narrative and belief that they have to be neutral or passive when it comes to changing systemic & institutional issues.
WHY NOW?
The AVC’s of Becoming a Service and Social Change Organization

- Engaging staff and leadership in learning about the causes of the issues clients face
- Increase service constituent knowledge about the systems and policies that impact them
- Develop or strengthen relationships with organizations that center the issues that impact their constituents
- Assessing current resources and infrastructure to strengthen internal capacity
- Setting and generating buy-in around social change priorities
- Open channels for them to tell their own stories and offer their perspectives on what needs to change
- Sharing power with constituents and develop their leadership
- Leveraging assets to build collective power
- Connecting constituencies and their shared experiences, values, and social change goals

The Current State of Nonprofit Advocacy and Public Engagement
Methodology

- Nationally Representative Survey of 501(c)(3) nonprofits (excluding “Eds and Meds”)
  - NCCS Core 990 Public Charity File (2018)
  - Total Revenue ≥ $50,000
  - Stratified by Org Size Categories, Subsector (NTEE), and State
- Online Survey fielded July 2022 – December 2022
  - 2,282 completed surveys
  - Weighted to be representative of the sector
Definitions Used in the Survey

**Lobbying** involves taking a position on specific legislation (local, state, or federal level) and communicating this position to legislators or their staff, either directly or indirectly.

**Policy advocacy** involves attempting to influence government policy at the local, state, or federal level. This may include lobbying, but it also involves educational and information-sharing activities such as sponsoring events to raise public awareness of an issue, conducting research, educating the public about policies that affect your organization, or participating in coalitions.
### Key Findings

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<thead>
<tr>
<th>Percentage</th>
<th>Description</th>
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<tbody>
<tr>
<td>31%</td>
<td>A significantly lower proportion of nonprofits report advocating or lobbying compared to 20 years ago. Only 31% of nonprofits report engaging in advocacy or lobbying over the last five years, which is less than half of the percentage of nonprofits that reported ever lobbying in 2000 (74%).</td>
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<tr>
<td>70%</td>
<td>Mission plays the largest role in determining nonprofit advocacy and lobbying. Approximately 70% of policy-engaged nonprofits report their mission encourages their policy engagement. Among nonprofits that do not engage in policy, 56% report policy engagement does not apply to their mission.</td>
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<tr>
<td>32%</td>
<td>Today, significantly fewer nonprofits know the advocacy activities they can legally do, compared to 20 years ago. In 2000, over half of 501(c)(3) public charities (54%) knew they could support or oppose federal legislation. Today, only 32% of nonprofits are aware of that fact.</td>
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<td>13%</td>
<td>Only 13% of nonprofits conduct nonpartisan activities to help people vote. Among nonprofits that advocate, 1 in 5 provide people with nonpartisan voter information.</td>
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<td>57%</td>
<td>Nonprofits that belong to collaborative groups advocate at higher rates than those that are not members. Of nonprofits that belong to local, state, or national coalitions, 57% advocate or lobby, compared to only 12% of nonprofits that do not belong to such coalitions.</td>
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<td>36%</td>
<td>Although a majority of nonprofits have a diversity, equity, and inclusion (DEI) statement, only 36% engage in policy activities to create more equitable systems. However, policy-engaged nonprofits' investment of time and resources in DEI activities is much higher than for non-policy-engaged nonprofits.</td>
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Advocacy/Lobbying Engagement

- 69.30% Engaged in Both Advocacy and Lobbying
- 17.80% Advocacy but No Lobbying
- 9.79% Lobbying but No Advocacy
- 3.11% Neither Advocacy Nor Lobbying

Source: Based on the answers to the questions, “Did your organization engage in any lobbying efforts on behalf of your constituents or your organization?” and “Did your organization engage in any policy advocacy other than lobbying on behalf of your constituents or your organization?” The respondents were expected to answer YES or NO to these questions. Number of observations = 2,275.
Comparison of Nonprofit Legal Understanding (2022 vs. 2000)

Can your organization...

- Use government funds to lobby Congress (no)
  - % Correct PENS (2022): 94
  - % Correct SNAP (2000): 98

- Talk to elected officials about public policy matters (yes)
  - % Correct PENS (2022): 69
  - % Correct SNAP (2000): 91

- Endorse a candidate for elected office (no)
  - % Correct PENS (2022): 87
  - % Correct SNAP (2000): 91

- Take a policy position without reference to a specific bill...
  - Support or oppose federal regulations (yes)
    - % Correct PENS (2022): 45
    - % Correct SNAP (2000): 79
  - Support or oppose federal legislation (yes)
    - % Correct PENS (2022): 32
    - % Correct SNAP (2000): 73
  - Sponsor a forum or candidate debate for elected office (yes)
    - % Correct PENS (2022): 31
    - % Correct SNAP (2000): 57
  - Lobby if part of your budget comes from federal funds (yes)
    - % Correct PENS (2022): 18
    - % Correct SNAP (2000): 50
  - *Work closely with a 501(c)(4) for advocacy purposes (yes)
    - % Correct PENS (2022): 45
    - % Correct SNAP (2000): 45
  - *Participate in nonpartisan voter engagement (yes)
    - % Correct PENS (2022): 57
    - % Correct SNAP (2000): 57
Advocacy/Lobbying Engagement by Subsector

- Environment: 43%
- Healthcare: 40%
- Public Benefit: 35%
- Human Services: 32%
- Education: 26%
- Arts & Culture: 26%
- Religion: 17%
- International: 11%
Advocacy/Lobbying Engagement by Geographic Scope of Programs

- Local or Multiple Local Areas: 46.3%
- State or Regionally Within a State: 33%
- National or Across Multiple States: 9.3%
- International: 11.4%

- % of Sector
- % Engaged in Lobbying or Advocacy
Advocacy/Lobbying Engagement among Human Services organizations by Geographic Scope of Programs
Motivating and Discouraging Factors Among Human Services Organizations

- Our mission
- Organization's attitudes toward advocacy
- Activities that coalitions or membership associations conduct
- Our organization's attitudes toward local, state, or federal policy decisions
- Donor preferences
- We receive government funding
- Organizational Capacity
- Tax laws or IRS rules

# Advocacy and/or Lobby # Neither Advocacy nor Lobby
Nonpartisan Elections Engagement

Only 1 out of 7 nonprofits (13.8%) conduct nonpartisan activities to help people vote

8% Voter Education
8% GOTV
5% Voter registration
3% Ballot initiatives

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<th>Advocacy or Lobbying</th>
<th>% Engaged (Weighted Mean)</th>
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<td></td>
<td>Any Elections Work</td>
</tr>
<tr>
<td>All Nonprofits</td>
<td>30.7%</td>
</tr>
<tr>
<td>Nonprofits if Advocacy/Lobbying = Y</td>
<td>100%</td>
</tr>
</tbody>
</table>
Nonpartisan Elections Engagement

Only 1 out of 7 human services organizations (13.4%) conduct nonpartisan activities to help people vote

- 8% Voter Education
- 8% GOTV
- 5% Voter registration
- 3% Ballot initiatives

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<td>Any Elections Work</td>
</tr>
<tr>
<td>All Human Services</td>
<td>32.2%</td>
</tr>
<tr>
<td>Human Services if Advocacy/Lobbying = Y</td>
<td>100%</td>
</tr>
</tbody>
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Nonprofits must engage in advocacy to share our stories of impact, community need and how we can help solve critical social issues. Being advocates, and engaging others in civic life, helps ensure that every individual and family, regardless of their background or where they live, has the support they need to thrive. Our sector must engage in advocacy if we want to drive real change and equity for all.

Suzanne McCormick  
President and CEO, YMCA of the USA
PANEL DISCUSSION
Mercedes Brown
Director, Race Equity Assessment
OUR PANEL

Mileyka Burgos
Allapattah Collaborative

Hope Williams
Sustainable Economies Law Center

Micaela Oer
Hispanic Interest Coalition of Alabama
Ways to get involved and learn more:

- Request a 1:1 with BMP to learn more about the framework & planned cohort
- Visit our Cohort Blog to learn more
- Reach out with questions
- Apply to join the cohort
COMMUNITY OF PRACTICE OPPORTUNITY
APPLY TO JOIN THE COHORT!

- Open to Direct Service Organizations who want to introduce or increase their social change work
- Learn about and identify ways to implement the 4 key strategies of the framework
- Connect across issue areas with other providers and gain a community of support for the work ahead
- **Applications due by January 19th, 2024**
Schedule

SESSIONS
MARCH 2024 - MAY 2024
1 Session, every 3 weeks

TECHNICAL ASSISTANCE
MAY 2024 - JULY 2024
High and low touch, individualized support
Series Overview

Module 1: Intro to Security to Wellbeing Framework
Module 2: Theory of Social Change & Internal Alignment
Module 3: Client Voice & Collective Action
Module 4: Moving Forward into Action!

Building Movement Project
Activating Nonprofits | Fueling Change
THANK YOU & LET’S TALK!

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To learn more about the Community of Practice Opportunity:
Security to Wellbeing Cohort Blog: bit.ly/SWB-Cohort1
SWB Cohort FAQ: bit.ly/SWB-faq

Independent Sector Report: independentsector.org/policy/advocacy-research/

Website:
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