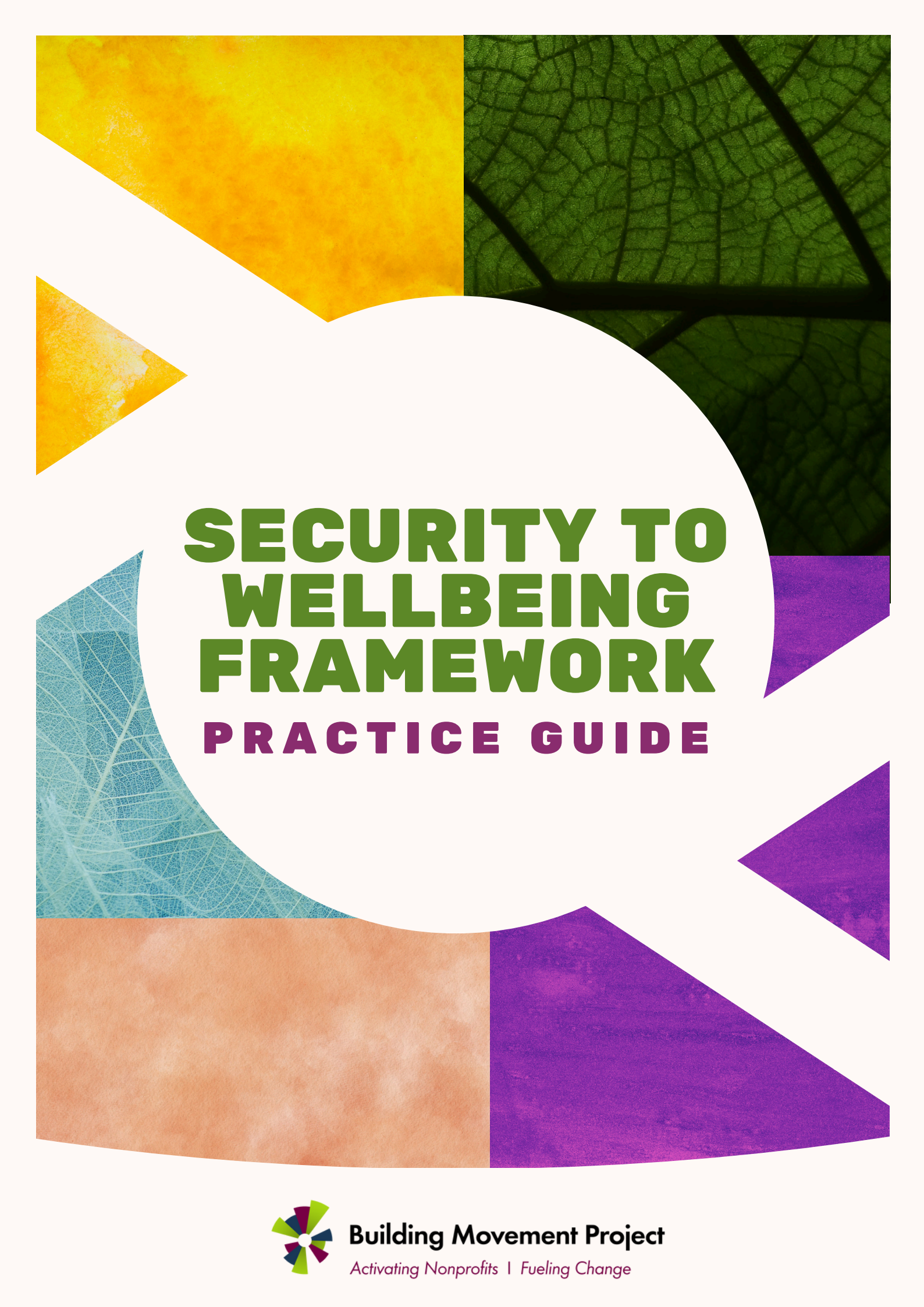




SECURITY TO WELLBEING FRAMEWORK

PRACTICE GUIDE



Building Movement Project

Activating Nonprofits | Fueling Change

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About Building Movement Project

The Building Movement Project (BMP) is a national non-profit organization that catalyzes social change through research, relationships, and resources that strengthen the nonprofit sector.

A program of the Building Movement Project, Service and Social Change, generates tools, trainings, and narratives to support direct service organizations increase their capacity to affect broad social change in their communities.

Acknowledgements

Héctor Malvido, Senior Manager of Partnerships at the Building Movement Project, authored this practice guide. Janis Rosheuvel, BMP's Executive Director, provided editorial guidance. Additional support came from Jasmine Leeward, Communications Associate. BMP also thanks Eseosa Eke and the IconiQ Creative Group for the design and layout of this resource and Jennifer Kotting for design inspiration.

The current version of this framework is the result of many years of work, which includes the organizations of the New Mexico Common Good Action Project (CGAP), who originally conceived the model in 2019, and members of a 2024 Security to Wellbeing Cohort that refined it:

2019 CGAP Members

- Agri-Cultura Network / La Cosecha
- All Faiths
- Barrett Foundation
- Heading Home
- New Mexico Asian Family Center
- Three Sisters Kitchen
- Together for Brothers
- Transgenderr Resource Center of NM

2024 Cohort Members

- Communities in Schools of Memphis
- Everyone Home DC
- Hispanic Interest Coalition of Alabama (HICA!)
- Immigrant Social Services Inc.
- Partnership for Resilience
- Peers Envisioning and Engaging in Recovery Services (PEERS)
- Project ANAR
- Shenandoah LGBTQ Center
- Together for Brothers
- Weld Seattle

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If you have questions about use, please contact us at info@buildingmovement.org

INTRODUCTION

Nonprofit service organizations are essential to advancing individual and community wellbeing. The services they provide are often the only lines of support communities and individuals have during times of hardship; they step up to fill gaps in our social safety net which state & local governments leave behind. The work service organizations do is indispensable and necessary.

For too long, service organizations have been relegated into narratives that label them as “charities” or “do-gooders”, minimizing their capacity for broad social change and diluting the power they already inherently possess. The intended impact of these narratives is to further isolate providers away from movement work and to break up the power that may challenge our current systems and the conditions they create.

Our belief is that service organizations don’t have to choose between providing life-saving and stabilizing services to their communities and participating in social change work because they are equipped with the qualities necessary to engaging in both:

- ✓ **The nature of their work revolves around cultivating deep and meaningful relationships to better serve their communities**
- ✓ **The communities and individuals they support are the most knowledgeable about the institutional policies and barriers that hold them back**
- ✓ **Staff who work directly with community often identify the need for changes in procedures, policies, and laws that prevent those they support from exiting service continuum**

Because of these qualities, we believe that service organizations are uniquely positioned to influence broad social change that can strengthen and deepen the impact of current services given while transforming the systems that create the need to begin with.

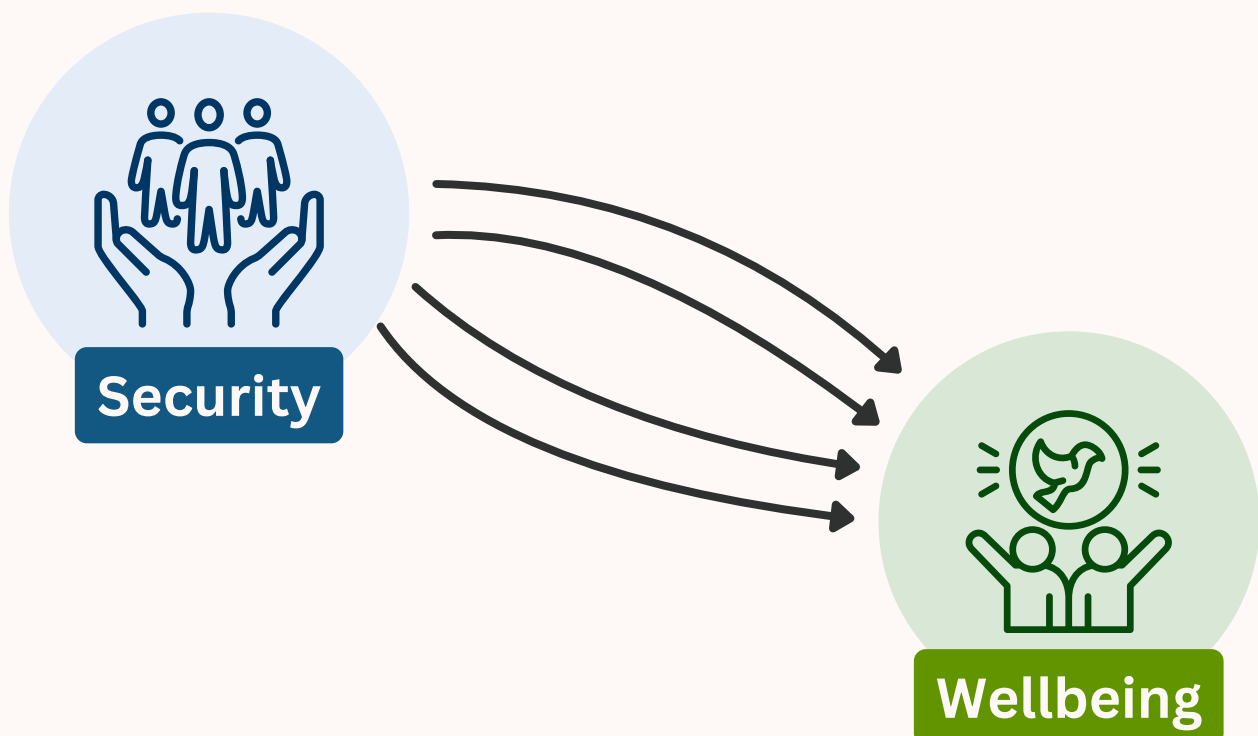
ABOUT THE SECURITY TO WELLBEING FRAMEWORK

The Security to Wellbeing Framework is visually represented as a spectrum; on one end we have Security and on the other Wellbeing. The spectrum helps you and your organization understand where it might be on it's journey to become a Service and Social Change organization.

The Framework is comprised of four different strategies:

- Theory of Social Change
- Internal Alignment
- Client Voice
- Collective Action

They help organizations reflect on and assess their capacity for social change. The goal is to cultivate the leadership of the people you serve, generate buy-in from stakeholders, and deepen the organization's relationship with their community.



WHAT DOES "FROM SECURITY TO WELLBEING" MEAN?

The framework defines **Security** as the activities and work that service organizations do to stabilize the communities they serve:

- Providing affordable housing or rapid rehousing to people experiencing homelessness
- Services for immigrant communities
- After-school educational programming
- Food and child care supports for families
- And many more



Essentially, what people and communities need to survive the conditions set by harmful and exclusionary systems.

The framework defines **Wellbeing** as the outcome of what building community power, self-agency, and alignment of social change goals can be:

- The liberation from systems of oppression that create the need to stabilize communities in the first place
- The growing and thriving of individuals and communities outside of the nonprofit service sector, enshrining their self-determination
- The centering and lifting up of client voices to inform, guide, and lead how systems are shaped
- Power is shared with clients to create opportunities for them to reimagine and steward the creation of a new and liberatory society



APPROACH TO USING THIS GUIDE

The practice guide was created by service providers for service providers. More specifically, anyone who is a stakeholder of the organization; from those who work directly with the communities served such as frontline staff and program managers, to executive leadership to, most importantly, program participants.

The guide breaks down the strategies to become a Service and Social Change Organization in a way that brings in all practitioners with varying experiences engaging in social change work; those who are stepping into this for the first time and those who have been in the movement for years.

It follows popular education models which center participating organizations' own experiences, inquiries, and learning. The guide is designed with many elements intended to bring in the participant's voice, foster discussion amongst peers, explore potential opportunities and challenges, and provide a new understanding of where organizations can integrate and implement key lessons into their own work on the ground.

The guide also includes exercises and worksheets for each of the strategies to deepen understanding of the concepts and reflect on how your organization can integrate the lessons learned in a way that makes sense for you. Additionally, you will find case studies, resources, and tools that should help you learn from the wisdom of service providers engaging in social change work in the field!

THEORY OF SOCIAL CHANGE



THEORY OF SOCIAL CHANGE



Having conflicting goals, dedicating resources to unconnected targets, and accommodating incompatible interests are the luxuries of the rich and powerful, but they make for bad strategy. Despite this, most organizations will not create focused strategies. Instead, they will generate laundry lists of desirable outcomes and, at the same time, ignore the need for genuine competence in coordinating and focusing their resources.

...not having a good strategy has meant only scratching the surface of what is possible, it has meant doing good work but not taking it all the way, leaving power on the table, leaving potential untouched.

**- Good Strategy Bad Strategy
as excerpted in Yotam Maron's
“Moving Toward Conflict for the Sake of Good Strategy”**



THEORY OF SOCIAL CHANGE

Concept Breakdown

Many service organizations use a Theory of Change or logic model to articulate goals for providing services to their communities. These tools can support program planning, evaluating if impact is making a difference, and, more importantly, help organizations remain in lockstep with their mission and vision.

In the same way, the **Theory of Social Change** helps us to illustrate the multiple and diverse elements that impact not only our communities and organizations, but also the root causes of the conditions that necessitate our services to begin with.

Defining Root Causes

Root causes are the underlying factors that create community problems, making those problems likely to persist despite having services in place to help individuals and families meet their immediate needs. The concept comes from science and refers to recurring issues that arise because the “root” or true causes are not addressed.

THEORY OF SOCIAL CHANGE

Comparing the Models

Theory of Change

Assessment of Individual Needs

What is the community need and how we think the problem is solved?

Service Goals and Activities

How is it defined and outlined by our mission and programming?

Resources Needed

What we need to run our program to meet our goals?

Service Provision Metrics

How do we measure and define the success of our work?

Theory of Social Change

Root Causes of Community Needs

How our mission addresses root causes of the needs?

Social Change Priorities and Strategies

What guides our work to address root causes?

Resource Opportunities

What is already available to support our social change work?

Community Impacts

What will our communities look like when we've succeeded?

THEORY OF SOCIAL CHANGE

Here's a quick example of what these might look like in action:

When The Theory of Change Asks...

What are the service goals outlined in our mission?

Support Latinx Immigrant Communities in breaking down barriers to health care systems and services

Theory of Social Change Follows up With...

What are the root causes that our mission addresses?

Racist and exclusionary policies and systems that limit access for immigrant families by way of language, income, and legal barriers

Both are incredibly important questions to ask because it deepens our own organization's understanding of what our relationship is to the issues we are hoping to address with our programming AND it makes clear what factors are influencing them to continue to exist.

As we begin to surface these root causes, developing a Theory of Social Change for your organization helps to articulate the relationship your work has with these issues, and allows you to develop *social change priorities* - or - goals that your organization sets that seek to move us closer to addressing them in ways that make sense for your own capacity, resources, etc.

If program and service priorities are...

Engage individuals and families with information on how to navigate health care systems through workshops and case management

Then Social Change Priorities could be...

Organize a space in which individuals and families can share their stories of how they've been excluded with each other to build community power

THEORY OF SOCIAL CHANGE



Think of **Social Change** Priorities as your guide or map that leads you towards broad social change

Having a set list of *social change priorities* is the first step service providers can take to becoming more engaged with social change work. These priorities gain their meaning and impact when they are powered by the organization's mission, vision, and values.

It is important to name that *social change priorities* are connected to an organization's service and program priorities - they should bolster what is already being done, not take away from it.



SOMETHING TO CONSIDER **Social Change** Priorities vs. Service Priorities

As you build internal alignment around social change priorities, anticipate hesitation about taking them on. Your organization might feel like there's no capacity or that this type of work doesn't add to communities as you may expect.

*What is important to name about social change priorities is they are connected and in service of your organizations service priorities;
they should serve to bolster what you are already doing, not take away from it!*

THEORY OF SOCIAL CHANGE

How does **Social Change** actually happen?

The fundamental way we build power and make change is through the implementation of key strategies that help us understand the systemic and political causes of our problems, devise solutions, develop leadership and move into action that wins concrete social changes.

Let's look at 5 of these different strategies of social change, as an example:

1

Organizing : A fundamental part of social change that starts with a foundational element - listening and meeting people where they are, paired with making connections with others of similar experiences and uniting around common goals.

2

Education: It can show up in so many different ways, know your rights trainings for example. It orients and grounds people to what causes the conditions we live with today.

3

Networking: How we operationalize community - creating connections with organizations and people with similar values and identifying ways to collaborate and engage in movement together.

4

Advocacy: Direct service providers know this more than most - advocacy shows up in how resources for clients are negotiated AND how policies are designed to incorporate clients' insights and needs.

5

Electoral Politics: Civic engagement forms a huge part of our democratic system. Taking opportunities to share how people can participate in voting is one thing, but learning deeply about HOW the issues being voted on matter when sharing power with the communities you serve.

*These strategies (and their outcomes) enable organizations to serve as **social change agents** - undoing the veil of isolation and false narratives that service work isn't an important part of how social change happens.*

*By having a set list of **Social Change Priorities**, we believe that your organization can actually get closer to accomplishing your organization's mission and vision.*

THEORY OF SOCIAL CHANGE

Reflection Questions

What assumptions does our organization's mission make about the people we serve, the problems they face, and how those problems should be addressed?

How can we leverage what we do well as an organization - our strengths, our resources, and the trust we've built, to engage in broad social change in our communities?

What do we currently do as an organization that addresses the root causes of the issues we are working on?

THEORY OF SOCIAL CHANGE PRACTICE WORKSHEET

ACCESS THE PRINTER-FRIENDLY WORKSHEET [HERE](#).

Purpose:

This worksheet is designed to help you and your organization reflect about the relationship your programming has with root causes and support you in developing social change priorities that align with your mission, vision, and values in a few easy steps.

Step 1: Who are we?

The power and meaning behind your social change priorities comes directly from what powers and informs your programming as an organization.

Name of Non-Profit Provider:	What is your Mission?

Step 2: Our Theory of Change

The following questions should have clear answers derived from what you are already doing on a day-to-day basis. For your responses, be as specific as possible.

What needs does your community have?
How does your organization's mission address these needs?
What are the service/program goals that address your community's needs?
What resources does your organization need to meet your service/program goals?
How do you measure and define how your work is successful?

THEORY OF SOCIAL CHANGE PRACTICE WORKSHEET

ACCESS THE PRINTER-FRIENDLY WORKSHEET [HERE](#).

Step 3: Our Theory of Social Change

Respond to the following questions reflecting on the responses you wrote in Step 2. These questions revolve around the relationship your work has with root causes.

What are the root causes of your community's needs?

These could be policies, narratives, systems, or all of the above that create the conditions your community faces

How does your organization's mission acknowledge root causes?

Reflect on your mission as a social change guide - what is it working towards?

How are our service/program goals connected to root causes?

Think on the relationship your programs have with the conditions your community faces

What assets do we already have that can support addressing root causes?

These could be relationships, knowledge, funding, or any assets that can support social change work

How do you envision the community you serve if root causes were addressed?

Imagine what their lives would look like if they had what they needed with no barriers or obstacles standing in the way

THEORY OF SOCIAL CHANGE PRACTICE WORKSHEET

ACCESS THE PRINTER-FRIENDLY WORKSHEET [HERE](#).

Step 4: Social Change Priorities

Now that you have surfaced the relationship your current programming has with root causes, reflect on the responses you wrote in Steps 2 and Steps 3 and create a Social Change Priority or Priorities for your organization.

Remember - *Social Change Priorities are a guide that are aligned with your mission! They should bolster what you are already doing and also point the way towards what you envision for your communities through your social change work*

If a program/service priority is...	Then Social Change Priorities could be...
<i>Example: Engage individuals and families with information on how to navigate health care systems through workshops and case management</i>	<i>Example: Educate participants of workshops on the history and exclusionary nature of our healthcare systems</i>

INTERNAL ALIGNMENT



INTERNAL ALIGNMENT



If you want to build a ship, don't drum up people to collect wood and don't assign them tasks and work, but rather teach them to long for the endless immensity of the sea.

- Antoine de Saint Exupéry



INTERNAL ALIGNMENT

Concept Breakdown

Organizations are made up of a collection of stakeholders that both inform and steer how they operate, who they serve, and their overall impact in their communities. In BMP's view, each stakeholder plays an important role in an organization's learning and ability to provide services to their community and they each bring their own unique perspective.

Typically, nonprofit organizations are made up of the following stakeholders that are key to advancing the work:



Board of Directors

A nonprofit governing body that provides direction, knowledge, and oversight to ensure the organization is financially stable and legally compliant.



Donors, Foundations, and Grant Partners

External individuals, philanthropic organizations, or government agencies that form a bulk of the revenue organizations bring in.



Organization Leadership

Senior staff members who oversee finances, funding, programming, strategic vision, goals, and overall operations on a day-to-day basis.



Program Participants, Clients, or Guests

Individuals and/or families that are the primary recipients of services your organization provides.



Program Staff

Staff members who execute the organization's programs which generally revolve around directly providing services to clients or beneficiaries, running programs, building partnerships with other providers, and more.



Community Members

External individuals that live in the communities you serve that do not receive services

All stakeholders have an understanding of what your organization does from their vantage point: what services you deliver, what issues you are working on addressing, etc. They all form a part of your organization's DNA. Your programming and outcomes are optimal when they are aligned around your service goals and overall mission.

INTERNAL ALIGNMENT

The **Internal Alignment** strategy is another fundamental step in advancing your organization's *social change priorities*. It is a strategy that encompasses the alignment of your organization's stakeholders and assets. Its philosophy, people power, practices, and resources all working towards the changes you want to see in the communities you serve.

Part of the magic of this diversity in perspectives from each stakeholder is that it brings a number of ways in which they can function as social change agents, each honing in on their strengths and expertise to further support your *social change priorities*.

“Every moment is an organizing opportunity, every person a potential activist, every minute a chance to change the world” - Dolores Huerta

Internal Alignment happens when you are able to connect with the diverse opinions and expertise of your stakeholders, finding a role for them to play in engaging in social change work!



SOMETHING TO CONSIDER Social Change Priorities vs. Service/Program Priorities

Bearing in mind your diverse stakeholders and the 5 Social Change Strategies to make change happen (Organizing, Education, Networking, Advocacy, and Electoral Politics), try reflecting on the following questions to think about what opportunities exist in the strengths your stakeholders bring:

- *How can each strategy inform your service work?*
- *Based on their strengths and expertise, what stakeholder(s) should engage with which Social Change Strategy?*
- *How can our service work inform these strategies to make them better?*

INTERNAL ALIGNMENT

Strategies to Cultivate Buy-in for Social Change Work



Center the Mission & Vision

Social change work moves you closer to accomplishing the mission of your organization and vision of the world and community you are working towards. Use it as a guide to cultivate buy-in from stakeholders and calibrate your *social change priorities*.



Create a team

Dedicate time and staff towards accomplishing your social change priorities

Think of this as your design team; they are a dedicated group of staff/program participants that make sure to steward the creation and implementation of Social Change Priorities.



Offer spaces and pathways for all stakeholders

Everyone has a role to play; think about what you will need to implement social change work and consider what your stakeholders need to best support your goals.

Example: Provide opportunities to listen to and learn from clients about a policy or systems problem that they are struggling with including spaces where staff and clients can learn together.

INTERNAL ALIGNMENT

Strategies to Cultivate Buy-in for Social Change Work



Set expectations for continual practice

The impact of social change work won't be felt or seen overnight. This process takes time! Expect to continuously learn, grow, and act on social change. Don't be discouraged if there are challenges or obstacles along the way.

Examples:

Write a statement of values or principles to accompany your organization's mission statement. Include a description of your organization's commitment to equity, justice, and wellbeing. Visit the statement at regular intervals to discuss its relevance and how it is being reflected in the organization's work.

Incorporate social change learning and actions into staff job descriptions, performance evaluations, and goal-setting.

Make sure that your board of directors is informed and engaged in the organization's efforts to increase internal capacity for social change.



Target resources to support capacity building for social change

Seek funds to support staff and board member training, attendance at conferences or participation in legislative activities, and joining in advocacy activities with others.

INTERNAL ALIGNMENT

Case Study

Finding Alignment in Getting Out The Vote

Excerpt from "From Service to Social Change a Case Study on a Memphis Organization's Civic Engagement"

CIS of Memphis advances educational equity in schools through holistic programming that centers the success of both students and their families. For over a decade, they have been working deeply in the local school systems, looking at factors that affect the educational achievement and success of the students they serve such as housing, mental health resources, and career advancement support.

Historically, they rigidly stayed in their lane, focusing only on programming and initiatives that revolved around the success of their students. More recently, they had been thinking about **broadening their mission** of “surrounding students and families with a community of support, empowering them to stay in school and achieve in life,” to **include an analysis of root causes**. Chief of Strategy, Jessica Pontoo, and her team began looking at ways to deepen their service work and broaden the social change efforts they have undertaken alongside their community outside of their regular programming. One timely initiative that emerged was getting their communities out to vote for the upcoming election by leaning into their organization’s mission and values to lead the way while also addressing systemic issues getting in the way of Memphians from participating in the election.

The Impact

What at first was an idea mentioned in passing in a regular meeting quickly turned into a monumental initiative led by CIS of Memphis in partnership with their local community college and other organizations across the city. Over the course of 3 separate events, almost 100 older and younger generations of Black and Brown Memphis locals came together to support each other to navigate election information and over 30 registered to vote on the spot.

Jessica remarked on how moved her staff were to engage in this work: *“I saw people come alive in this work, it was an opportunity to create initiatives in which we can extract meaning and purpose in the work because so many people heard this message, they felt it was important. While it is crucial to provide direct support, it’s equally important to go upstream and address the root causes.”*

INTERNAL ALIGNMENT PRACTICE WORKSHEET

ACCESS THE PRINTER-FRIENDLY WORKSHEET [HERE](#).

Purpose:

This worksheet is designed to help you take inventory of who is a stakeholder within your organization and what role they can play in engaging in social change work you are pursuing.

Step 1: Who are our organization's stakeholders?

Organizations are made up of a collection of stakeholders that both inform and steer how it operates, who it serves, and its overall impact in their communities.

Typically, nonprofit organizations are made up of the following stakeholders that are key to advancing the work:

- Board of Directors
 - A nonprofit governing body that provides direction, knowledge, and oversight to ensure the organization is financially stable and legally compliant.
- Organization Leadership
 - Senior staff members who oversee finances, programming, strategic vision, goals, and overall manage operations on a day-to-day basis.
- Program Staff
 - Staff members who execute the organization's programs which generally revolve around directly providing services to clients or beneficiaries, running programs, building partnerships with other providers, and more.
- Donors, Foundations, and Grant Partners
 - External individuals, philanthropic organizations, or government agencies that form a bulk of the revenue organizations bring in.
- Program Participants, Clients, or Guests
 - Individuals and/or families that are the primary recipients of services your organization provides
- Community Members
 - External individuals that live in the communities you serve that do not receive services

Are there any other stakeholders in your organization not listed above?

INTERNAL ALIGNMENT PRACTICE WORKSHEET

ACCESS THE PRINTER-FRIENDLY WORKSHEET [HERE](#).

Step 2: Connecting Service Work to Social Change

Bearing in mind your diverse stakeholders and the 5 Social Change Strategies to make change happen (Organizing, Education, Networking, Advocacy, and Electoral Politics), try reflecting on the following questions to think about what opportunities exist in the strengths your stakeholders bring:

Social Change Strategy	Reflection Questions
Organizing: <i>A fundamental part of social change that starts with a foundational element - listening and meeting people where they are, paired with making connections with others of similar experiences and uniting around common goals.</i>	How can it help or inform our current services and programming?
	Which of our stakeholders would engage with this strategy?
	How can our service work inform these strategies?
Education: <i>It can show up in so many different ways, know your rights trainings for example. It orients and grounds people to what causes the conditions we live with today.</i>	How can it help or inform our current services and programming?
	Which of our stakeholders would engage with this strategy?
	How can our service work inform these strategies?

INTERNAL ALIGNMENT PRACTICE WORKSHEET

ACCESS THE PRINTER-FRIENDLY WORKSHEET [HERE](#).

Networking: <i>How we operationalize community - creating connections with organizations and people with similar values and identifying ways to collaborate and engage in movement together.</i>	How can it help or inform our current services and programming?
	Which of our stakeholders would engage with this strategy?
	How can our service work inform these strategies?
Advocacy: <i>Direct service providers know this more than most - advocacy shows up in how resources for clients are negotiated AND how policies are designed to incorporate clients' insights and needs.</i>	How can it help or inform our current services and programming?
	Which of our stakeholders would engage with this strategy?
	How can our service work inform these strategies?
Electoral Politics: <i>Civic engagement forms a huge part of our democratic system. Taking opportunities to share how people can participate in voting is one thing, but learning deeply about HOW the issues being voted on matter when sharing power with the communities you serve.</i>	How can it help or inform our current services and programming?
	Which of our stakeholders would engage with this strategy?
	How can our service work inform these strategies?



CLIENT VOICE



CLIENT VOICE



*If you have come here to help me you are
wasting your time, but if you have come
because your liberation is bound up with
mine, then let us work together.*

- Lilla Watson



CLIENT VOICE

Concept Breakdown

In the midst of social change work and the challenges or opportunities it may bring, program participants are too often an untapped source of power that can be a great boon to your organizations efforts.

Organizations might typically seek their program participant's insights or feedback in a transactional way that leaves power on the table such as annual surveys on program experience or sharing a positive outcome story for funders.

Client Voice is the strategy that seeks to engage program participants in ways that are:



Meaningful to them, their learning, and self-actualization



Formative to the organization's own practices, programming, and infrastructure



Building relationships and forming connections with their community

Program participants can encounter many places where their voice and power could be exercised - it can be something as big in scale as sharing a public comment in your local city council meeting to something smaller in scale like helping lead spaces in which they can practice sharing their own stories.



SOMETHING TO CONSIDER

Your organization's Social Change Capacity is directly tied to your clients

Increasing **CLIENT** social change capacity so they may:

- **Self-Advocate**
- **Have an analysis of root causes for systems issues**
- **Step into their own leadership**

Increasing **ORGANIZATIONAL** social change capacity so it may:

- **Create spaces that cultivate dialogue and feedback**
- **Build skills and processes internally to facilitate learning**
- **Assess and shift dynamics between itself and its clients to share power**

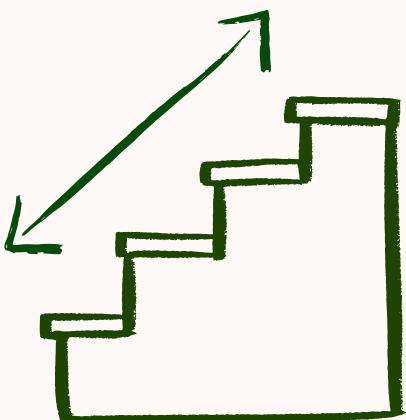
CLIENT VOICE

At the end of the day, **Client Voice** is a strategy that seeks to create pathways to leadership for your program participants in a way that makes sense for them, their capacity, and their interest.

While there are virtually innumerable ways of ways to foster leadership and share power - a Ladder of Engagement is one practical way of visualizing what a leadership pathway may look like.

What is a Ladder of Engagement?

It is a tool which helps to articulate what level of engagement or “rung” program participants/community members are in, where they came from, and where they can go. Knowing where someone is on their leadership journey is critical to understanding how your organization can support them in leveling-up!



The “rungs” on the ladder are non-hierarchical, meaning that there is value for both the organizations and the client no matter where they might find themselves. For instance, without the relationships and trust built in the earlier stages of the ladder of engagement, it wouldn’t be possible to lay a pathway to leadership that clients can buy into.

CLIENT VOICE

These are the rungs of the ladder of engagement for service organizations seeking to create pathways to leadership:



Leaders

Program participants that **produce and lead their own program or activity** which addresses problems they have identified, inviting staff to support as needed.



Contributors

Program participants **are consulted or serve as advisors** about the process development of programs designed to address problems identified by organizational staff, support with the development of programs created by staff/org.



Members

Program participants that are **informed of a project or program's purpose**, invited to participate as “representatives” of the organization's service recipients, and have the ability to turn down the invitation.



Followers

Program participants that **attend events or meetings outside of regular programming/service** in support of the organization's mission and work but are **not assigned a particular role**.



Observers

Program participants that are **directed by org staff on how to engage** with programming and services provided which they engage with on a needs-basis, opting in or out depending on circumstances.



CLIENT VOICE

Visualizing Leadership Development

With each rung ascended, more time will need to be dedicated to support learning and spaciousness - sometimes asking organizations and staff to sit with discomfort. Truly centering and moving people into places of leadership is hard, non-linear, and really challenges dynamics that have existed and been upheld.

Leadership Development requires organizations to:

- ✓ **Strategically and deliberately support people to step into their power, and train them up so they can effectively contribute to the success of programs and services**
- ✓ **Give program participants the knowledge and skills to hold elements of the programs and services on their own**
- ✓ **Stay attuned to dynamics and shifts between staff and emerging client leaders**
- ✓ **Grow and maintain durable relationships with emerging leaders as they develop their own agency and impact in the community**

Client Voice is looking at intentional ways of moving people up from the beginning stages of their leadership journey, to positions in which they have agency and share power with staff of the organization. You are building relationships with individual human beings, each of whom has the potential to contribute meaningfully to your organization's service and social change goals—and to the broader community as a whole.

It is an opportunity in which your organization can learn from and share knowledge with program participants to fully understand the realities of the systemic issues, build a belief in their own power, and work together to win.

Most importantly, it taps into the power that program participants inherently possess - shifting the narrative that many are led to believe in that they are powerless to make a difference in their communities

CLIENT VOICE

The **Client Voice** strategy can be implemented in many ways and works best if they take your organization's programming, staffing capacity, and incorporate your Social Change Priorities. Here are some examples:



Leaders

Former clients are hired as staff or invited to serve on the organization's board of directors
Create a Constituent Advisory Board



Contributors

Form and support a Speakers Bureau of clients where clients can share their personal stories and perspectives on the changes that are needed.



Members

Offer leadership opportunities outside of the organization where the client(s) represent the organization's interests or positions



Followers

Establish reciprocity practices, where clients are asked early on if they want to give back, with the understanding that everyone has something to give



Observers

Conduct voter engagement activities
Find opportunities for collaborative client engagement with other organizational allies.



CLIENT VOICE

Case Study

From Client Advisors to Clients as Leaders

Excerpt from “5% Shifts Report: Developing the Leadership of Recipients”

Client Voice is nothing new at Bread for the City. A recent internal report outlines more than 30 projects in which clients are active in more ways than just receiving services. To name a few examples, Bread’s clients regularly facilitate cooking workshops, lead wellness classes, plant gardens, testify at city commissions, and attend coalition meetings.

Some might consider these acts of “giving back” a natural outcome for the thousands of clients who come to this \$8-million multi-service agency in Washington DC. CEO George Jones sees it differently, “Our mission is to alleviate the suffering caused by poverty and to rectify the conditions that perpetuate it. Engaging our clients is the pivotal piece that will make meaningful impact on this mission.”

In the past few years, George has pushed this vision of deliberate client engagement and leadership building within Bread for the City. This case study highlights one example, the Client Advisory Board (CAB), and discusses ongoing challenges and concerns as Bread implements this strategy.

The Impact

The Client Advisory Board has become a community space for clients to access resources beyond the immediate services that Bread offers. Concretely, CAB members have used their experience and skills gained from serving on the board and participating in the research project to get jobs. The CAB is a training ground for leadership where new projects are nurtured and developed.

Ultimately, leadership building is about providing the opportunity for human dignity and respect. The CAB empowers individuals to have a voice — not only to have one’s ideas heard and implemented, but to transform that individual voice into a collective voice. The CAB provides a forum for working together to collaborate with others toward a common goal. It has been a space where people can feel their own power beyond themselves.

George comments on the transformation that he has observed, “It is the commitment and dedication they have to CAB. At the end of the day, it’s not just about them, but about creating something new for this community in terms of work.”

The background of the entire page is a close-up photograph of several large, vibrant purple leaves. The leaves are layered, with some in the foreground and others in the background, creating a sense of depth. The lighting highlights the veins and edges of the leaves, giving them a glossy appearance. The overall color palette is dominated by various shades of purple, from deep magenta to bright violet.

CLIENT VOICE

Reflection Questions

What leadership opportunities already exist in our current programming and how are we utilizing them?

What challenges can we expect as we think about sharing power with the people we serve?

How does our organization currently foster a culture of collaboration and feedback with the people we serve?

CLIENT VOICE PRACTICE WORKSHEET

ACCESS THE PRINTER-FRIENDLY WORKSHEET [HERE](#).

Purpose:

This worksheet is designed to help you and your organization articulate how your programming contributes to the leadership development of the people you work with on a daily basis. You may already be developing the leadership of your program participants without even knowing it!

Client Voice is the strategy that seeks to engage program participants in ways that are:

- **Meaningful** to them, their learning, and self-actualization
- **Formative** to the organization's own practices, programming, and infrastructure
- **Building** relationships and forming connections with their community

Step 1: What do we do

Take an inventory of what programs you offer, what they do, and who they serve. It doesn't have to be a complete list, but having at least 2-3 to compare between will help you in the rest of the worksheet.

Program Name	Description	Primary beneficiaries <i>(include an estimate number of how many are serviced as well)</i>
<i>Example: Homeless Prevention Program</i>	<i>Example: Light case management, short-term rental assistance, diversion, and mediation</i>	<i>Example: Low-income families with children, ~600 served per year</i>

CLIENT VOICE PRACTICE WORKSHEET

ACCESS THE PRINTER-FRIENDLY WORKSHEET [HERE](#).

Step 2: Fitting in the pieces

Now that we have our program offerings listed, take a moment to slot them into a rung on this ladder of engagement that you think they best fit into.

Remember - every run on the ladder of engagement is valuable and has something to contribute to the overall leadership development of your program participants. If you see some empty rungs, that's okay!

Rung:	Programs:
Leaders <i>Share power with staff and have agency to direct and develop initiatives they believe will address issues</i>	
Contributors <i>Participants are consulted for their insights and invited to co-design programs</i>	
Members <i>Invited to represent constituency, have an understanding of program purpose and root causes</i>	
Followers <i>Believe in Mission/Values but are not assigned any particular role</i>	
Observers <i>Program Participants that are directed by org staff and trust can begin</i>	

CLIENT VOICE PRACTICE WORKSHEET

ACCESS THE PRINTER-FRIENDLY WORKSHEET [HERE](#).

Step 3: Reflecting on our assets

Taking into consideration where you placed your organization's program offerings, take a moment to answer the following questions to see what you can do with what you already have.

Which of your current programs could be modified to support moving people up through the ladder of engagement?

What new programming could be developed to move participants into a higher rung of the ladder of engagement?



COLLECTIVE ACTION





COLLECTIVE ACTION



When the masses own their revolution, they are millions of fires burning for new life. It is not easy to put all these fires out. Spread your fire.

Make your revolution about you, and you lose it.

Make it about all living things and it erupts into purposeful glory - make your revolution a passion garden. Invite everyone to get down and dirty.

-Jaiya John, Freedom: Medicine Words for Your Brave Revolution



COLLECTIVE ACTION

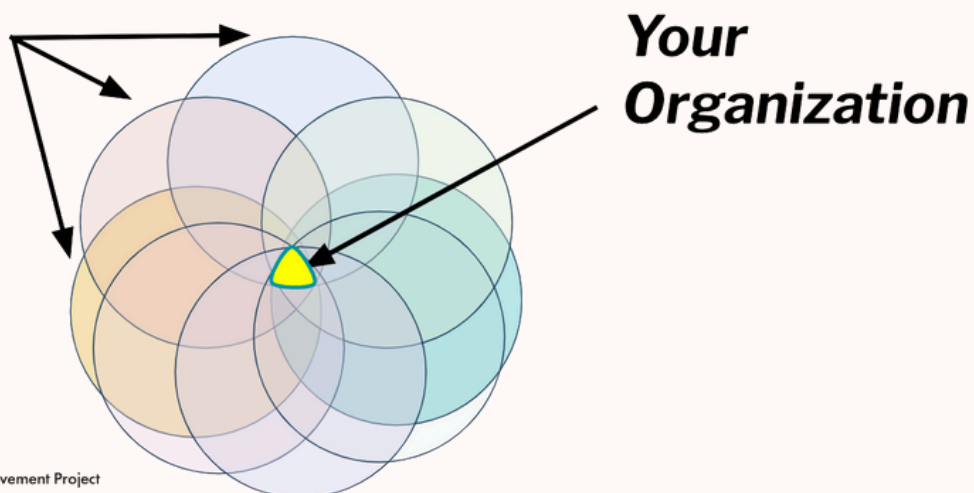
Concept Breakdown

Service organizations are too often spinning many plates to keep their programming staffed, funded, and running. Reviewing some of these strategies might seem overwhelming at first to implement but the truth is, you don't have to do it alone. Social change work is at its best, done in community and partnership with stakeholders who form part of your ecosystem.

The **Collective Action** strategy focuses on what your organization is already an expert in - building and reinforcing strong relationships. As service providers, your organizations have to hold an almost entrepreneurial spirit to lead your program's initiatives and achieve your service goals in the community. Forming partnerships is your bread and butter.

Collective Action is about intentional alliance building that encompasses a shared understanding of root causes and issues, honing in on each stakeholder or partner's own strengths to advance social change work in your communities.

Your Ecosystem



COLLECTIVE ACTION

Similar to the **Internal Alignment** strategy in which your staff, board, program participants, and even volunteers each have a role to play in supporting your social change work - **Collective Action** looks at your ecosystem and thinks through what ways and what roles partners can take in supporting social change work.



SOMETHING TO CONSIDER *Everyone starts somewhere*

Collective Action asks you to examine your relationship with other organizations that can generate momentum for social change. This requires an understanding of where organizations might be on their own social change journey to intentionally approach how you build the relationship.

Opportunities to connect an organization's work to social change are abundant:

- Just as your organization may **use its mission and values to guide your social change work**, it may also be a good starting point in bringing other organizations into the movement.
- Your organization may have an **overlapping constituency of those you serve** with a potential partner - share what ways you have approached social change work that make sense for their programming and the people they serve!
- Hold regular conversations on policy decisions that negatively impact your constituents and **build a shared analysis of the root causes** and faulty systems that uphold bad policy.

COLLECTIVE ACTION

Assessing Our Relationships

As we develop new partnerships or deepen existing ones, it's important to reflect on what kind of relationships we want to have while doing our social change work.

Types of Relationships / Cross Movement Approaches:

Each of the following has its own place and role in the work your organization does every day. Thinking through who you have relationships with now or who you might in the future, it's important to take stock of where you might be to know where you may want to go.



TRANSACTIONAL

This is all about making sure you are working together to meet the current moment or emerging issues that are impacting the communities you serve. It make look like a basic sharing of resources or knowledge to meet an end but it doesn't go beyond that.

Example

Finding opportunities in the community to share what your programming offers by attending resource fairs.



COLLABORATIVE

An approach to building things together based on common issues or even programming goals that require deeper partnership to accomplish. Each stakeholder aligned to the goals you are working towards together.

Example

Creating an outreach program that incorporates different providers with different services to more holistically cover the needs of folks you encounter during outreach.



TRANSFORMATIONAL

The focus of the relationship is to change systems and create something new together. It requires organizations to have a shared analysis of what needs to change and is rooted in shifting power and decision-making to those most impacted.

Example

Building relationships with different service providers or movement groups to think about problems in your community and collectively think about solutions that can have broad social change.

COLLECTIVE ACTION

Partnering to Support Immigrant's Savings

Excerpt from "5% Shifts Report: Crossing Organizational Boundaries to Build New Partnerships "

New Mexico families face many significant challenges that are often compounded for immigrant families and mixed-status families (where members of the same family have different citizenship or immigration statuses). According to the 2013 Kids Count Data book,⁶ the state has the highest percent (55%) of children with a parent who is not a U.S. citizen. Also, roughly a third of immigrants in the state live below the federal poverty line (the highest immigrant poverty rate in the country). New Mexico is already ranked last in the country for the well-being of children, but for immigrants and their families the health, education and economic barriers are even more difficult to overcome. Given these multiple challenges, a number of organizations are working together in order to help immigrants in the state.

Through a grant from a foundation to foster "collaborative impact," immigrant serving organizations, Encuentro, New Mexico immigrant Law Center (NMILC) and Prosperity Works – an intermediary organization that teaches local organizations how to develop and offer effective iDA programs – developed an individual lending program. Each partner had a distinct role in the program's success: Through Encuentro, participants gain an understanding of the United States' financial systems (including the importance of credit ratings) and learn about the loan program. NMILC determines participants' eligibility for various immigration programs, and Prosperity Works administers the loans. The three organizations also set up a loan committee that includes community members. The individual lending program is still very new, so only a handful of loans have been disbursed, but the model and partnership hold a lot of promise for similar efforts and continued collaboration.

The Impact

The loan program of the three organizations has been greatly appreciated by the immigrants who have been able to participate.

"Guadalupe" a program participant who emigrated from Mexico began to volunteer for Encuentro and completed their financial literacy program, opening a bank account and beginning to save money to pay for books her sons needed for school. She can describe in detail the application process, the low interest rate, the total monthly payment amount each son pays, and how long it will take them to pay off the loan. But according to "Lupe" – who now sits on the program's loan committee – "the impact is huge for them, they're losing their fear ... [this program] lets them dream and reach for more."

Lupe, who identifies as a community leader and is very involved in efforts to help other immigrants, also said that the coordination of services is magnificent: "even though the work they do is different, each organization understands the needs of the community."

COLLECTIVE ACTION

Reflection Questions

What are some of the things that work well or get in the way when it comes to making progress when working collectively with other organizations?

What role do values play when it comes to working in coalition or as a collective with other groups?

**What types of relationships (Transactional, Collaborative, Transformational) does your organization have the most of?
Which Type is lacking?**

COLLECTIVE ACTION PRACTICE WORKSHEET

ACCESS THE PRINTER-FRIENDLY WORKSHEET [HERE](#).

Purpose:

Use this space to map out key individuals or institutions who influence the environment your organization is working in. This can include, but is not limited to: other service providers, advocacy groups, community leaders, businesses, elected officials, etc.

- Ways to think about this:
 - Who is aligned with your mission and can compliment or support the organization's social change work?
 - Who is opposed to social change work that risks hindering or blocking you?
 - Who in your community is their position on things unknown?

Organization Name:	
Mission:	
Social Change Priority:	

Instructions:

In the grid on the next page, write down the names of groups or individuals in your community on the column they fit.

- The Organizational Strategies row is what these groups/individuals do as a part of their work
- The Allies, Unknown, and Opponents columns are where their work aligns with your organization's Mission and Social Change priorities

If you are unsure where a group/individual is aligned, place them on the Unknown column - use this as an opportunity to find out more about them!

Note: You can put organizations/individuals down multiple times.

COLLECTIVE ACTION PRACTICE WORKSHEET

ACCESS THE PRINTER-FRIENDLY WORKSHEET [HERE](#).

Organizational Strategies <i>The ways we see partners engaging with our Social Change Priorities</i>	Allies <i>We know they are aligned with our mission/goals and can support our social change work</i>	Unknown <i>We know who they are but are unsure about their alignment or capacity to support</i>	Opponents <i>We know they will oppose our social change work and will disrupt or block it</i>
Engage in base-building community organizing			
Support groups doing base-building organizing (technical assistance, capacity building)			
Facilitate community engagement processes			
Leadership Development (ladder of engagement, etc.)			
Communications			
Mobilizing / Crisis Response			
Policy Advocacy			
Research (Issue/Service-Based)			
Voting & Electoral politics			
Develop & advance a shared strategy across organizations			
Share models, tools & strategy across groups			
ADD YOUR OWN HERE			
ADD YOUR OWN HERE			

CLOSING



CLOSING



Everything is on fire, but everyone I love is doing
beautiful things
and trying to make life worth living
and I know I don't have to believe in everything
but I believe in that.

-

Nikita Gill, “In 150 Characters or Less”

The journey of becoming a *Service and Social Change Organization* is not always
linear, timely, or succinct.

At times it may even seem confusing, overwhelming, and futile.

You are not on this journey alone.

So many organizations like yours are starting or continuing to build on the legacy
of service organizations engaging in social change work because of the faith they
have in their own expertise, the leadership of the people they serve, and the
collective power of the communities they are a part of.

We hope this guide helps you in both the highs and the lows of this work and that
it ultimately deepens your faith in possible future in which the communities we
serve lead fulfilling and abundant lives outside of any service continuum.

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2025