Meaningfully Connecting with Communities in Advocacy and Policy Work

A Landscape Scan Commissioned by Fund for Shared Insight

Prepared by the Aspen Planning and Evaluation Program
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Acknowledgements

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Executive Summary

Commissioned by Fund for Shared Insight, this landscape scan explores whether and how US funders and nonprofits seek to meaningfully connect with the people and communities that their advocacy and policy work is intended to benefit. It employs an intentionally exploratory lens, without a predetermined definition of what "connecting" would look like in advocacy and policy contexts, nor presumptions about what might be needed to support connections.

The research findings are intended to inform Shared Insight's grantmaking strategy, and to contribute to the broader field's understanding of what it means to meaningfully connect with communities that are ultimately intended to benefit from advocacy and policy work.

Research Design

- Interviews with 54 individuals at 40 funding institutions, nonprofits, and consulting organizations.
- Qualitative survey responses from 224 nonprofits.
- Desk research on tools, frameworks, and other relevant resources gathered through the interviews and through a "call for examples" sent to four listervs in the advocacy, evaluation, and philanthropic communities.

Who is ultimately intended to benefit from advocacy and policy work?

When asked whom their advocacy or policy work was ultimately intended to benefit, most interviewees named groups of "everyday" citizens who constitute or are part of "a community" in some shape or form, such as those living in a particular geographic region, students, teachers, families, or farmers. Approximately 55% of the nonprofit and funding organizations included in the research specifically named marginalized groups, such as racial or ethnic minorities, low-income communities, immigrants, and refugees. But importantly, these groups are not seen as passive "beneficiaries" of advocacy efforts. In many cases, advocacy and policy work is done *with* and *by* these groups.

What does it mean to "meaningfully connect"?

Four Broad Definitions. The research revealed a nuanced and layered landscape of practices and perspectives regarding what it means to meaningfully connect with communities in advocacy and policy contexts. We distilled these responses into four broad definitions.

Informing is focused on outreach to communities, often using communications activities like action alerts, emails, reports, presentations, and social media to distribute accessible information about a policy debate, update community members on current issues, and encourage them to respond to calls to action. This form of connecting with communities can be one-sided, with information predominantly flowing from the organization to the community, but there are also examples where outreach is intentionally integrated with efforts to listen to and learn from communities.

Listening involves efforts to understand the priorities and perspectives of communities, which the organization then draws on as it develops its advocacy strategies and activities. Listening also includes opportunities for communities to provide feedback on something, such as an organization's draft strategic plan, policy proposals, or the impacts of a policy that has been implemented. Listening approaches include: traditional research methods like surveys and focus groups; discussions and meetings that occur in community settings; listening that occurs in the context of direct service provision; convenings; and advisory groups.

Co-creating gives communities decision-making roles in developing, managing, and implementing advocacy and policy work, often through participatory decision-making processes and governance structures. Examples include: committees or councils with decision-making roles; community organizing models that transfer decision-making to community members; and participatory grantmaking models that put people from affected communities in charge of grant decisions. Co-creation can also come in the form of community representation among staff and board members. Successful co-creation often requires building two equally important kinds of capacity: providing training and support for community members to effectively lead or co-lead advocacy efforts; and strengthening the ability of a funder or nonprofit to effectively receive and be influenced by diverse voices and perspectives.

Relationship building arcs over the other three definitions. Effective efforts to *inform* communities rely on relationship building that nurtures a community's willingness to trust and act on the information offered. And relationships grounded in active listening practices and personal connections – particularly visible in more participatory approaches to advocacy and grantmaking – are fundamental to organizations' efforts to authentically *listen* and *co-create*. Relationship building is understood to be a building block, not just for meaningfully connecting with community members but for organizing effectively, achieving sustainable movements, and driving durable policy change.

Multiple pathways, multiple layers. In advocacy and policy contexts, organizations use direct and indirect pathways through which to listen to or engage with communities. Some advocates (such as smaller grassroots or constituent-led groups) have strong direct relationships with communities, while others (typically larger or national nonprofits) connect indirectly through those groups that have deeper community relationships. Some use a mix of direct and indirect pathways. Similarly, some funders engage with nonprofit grantees or community foundations to learn indirectly about community perspectives; others seek to directly connect with community members. Moreover, organizations can create *layers* of connections. One example: a membership-based organization surveyed its local chapter members to inform its strategic plan, and then engaged chapter leaders in additional opportunities to provide feedback on draft elements of the plan. A more ambitious example: an advocacy organization uses an annual visioning session to gather community input on policy priorities; develops the capacity of a smaller set of community members to help shape and implement advocacy strategies; and mandates that the board include members of the affected community.

What does it take to meaningfully connect?

Having sufficient organizational capacity. Organizations need language skills and cultural competency; expertise in facilitating conversations and working alongside community members; and responsive institutional processes and structures that allow the organization to authentically hear and act on what it learns from community members. Respondents identified ample room for both nonprofits and funders to improve these capacities, and observed the roles that consultants and peer organizations can play in providing relevant expertise and helping to build these capacities.

Committing to meaningful connections. Nonprofits and funders must have a genuine interest and investment in valuing and learning from community perspectives. Evidence of commitment includes an institutional culture that values and reflects diverse perspectives and the expertise that comes from personal experience with the problems that the work is intended to address. For example, this means asking community members to help identify the priority problem and define solutions – not asking for "token community support" for an existing draft bill or pressuring local groups to work on short-term campaigns favored by a funder. The level of commitment to meaningful connection will likely correspond to the level of equity, diversity, and inclusion across an organization's hierarchy. Internal buy-in needs to manifest in how an organization's leadership and board include and value diverse voices.

Ensuring representation and accessibility. There is widespread consensus that more diverse voices, particularly those from communities of color and other marginalized communities, need to be heard in policy advocacy. Efforts to inform, listen, and co-create should include the full diversity of voices in a community, and need to be appropriately planned and resourced so that community members are able to participate. Funders can explore how changes in their sourcing strategies, investment approaches, and grant application practices could help diversify their grantmaking portfolio, bringing more voices to the table.

> " #policysowhite. It's amazing to me the number of rooms I walk into where it is all white people sitting around the table making the rules for the system that serves 50% kids and communities of color.

Organizations' hiring practices can also help ensure more diverse voices exert influence over policy advocacy decisions – provided there is sufficient institutional capacity and commitment to receive these voices.

Investing in relationship building. Building community relationships grounded in trust, mutual respect, and transparency takes significant time and care. Respondents from a wide variety of organizations – from a national conservation advocacy organization to a community organizer working on neighborhood campaigns to a funder supporting multi-issue membership organizations – emphasize that these kinds of relationships are essential to achieving sustained, long-term change in policies and systems. Grantmaking strategies, timelines, and expectations need to reflect the time and resources it takes to build the kind of authentic relationships that meaningful community engagement and effective advocacy require.

Having a plan to navigate disagreement. It can be challenging when funder or nonprofit staff disagree with a community on what to do. Be clear about how disagreements will be resolved – what processes need to be followed, who needs to be heard and how. And in cases where consensus cannot be reached, it should be clear how a decision will be made. For funders and nonprofits that support community-led efforts or community organizing, it may be necessary to "do a certain amount of backing off" in situations where community priorities differ from that of the supporting organization. And in the "sausage making" process of policymaking, advocates need to respect the community's view on which policy asks are or are not negotiable.

Creating value for communities. Efforts to connect can seem one-sided, asking community members to take time away from their work and lives to provide information for the organization's learning purposes. This may be particularly true in cases where the organization lacks deep community roots. "Giving back" something of value to communities can be part of the process of connecting – for example, by approaching grant reporting and site visits in ways that help advance a grantee's work, or by creating opportunities for community members to build their advocacy skills. Such skill building can be integrated into various kinds of advocacy models and co-creation processes.

Addressing power dynamics, sharing power: Power imbalances rooted in differences of race, ethnicity, culture, gender, and class continue to pervade the nonprofit sector and philanthropy. As a result, power dynamics and tensions around power sharing are embedded in relationships between funders and grantees, between funders and

Creating Value for Communities by Building Advocacy Capacity

- A community organizing nonprofit **trains students** to develop and run campaigns on the issues they decide are most important to their peers.

- A national network created an **advisory council** comprised of youth who participate in capacity-building activities to enable them to develop policy recommendations and advocate for these policies in meetings with policymakers.

- An advocacy organization provides locally respected **Promotoras** with training in advocacy, leadership, and the systems they seek to influence, and then connects them with local agencies and partners engaged in policy conversations.

community members, among nonprofits, between nonprofit staff and community members, and within communities. These power dynamics need to be acknowledged and addressed as part of any effort to meaningfully and authentically connect with communities, particularly in cases where the funder or nonprofit is not rooted in and reflective of the communities intended to benefit from advocacy efforts or policy changes. This involves being sensitive to power imbalances and recognizing the ways an organization's own practices and internal culture contribute to and reinforce these imbalances – and then taking steps to change those organizational structures, processes, and norms.

There are also considerable tensions around the role of expertise in advocacy and policy work – and who is (or is not) an expert. One definition of expertise comes in the form of professionals with in-depth knowledge and experience in policy, research, and advocacy. A different definition of expertise involves having lived experience with a problem or issue, or having experience working "on the ground" with communities. (We note that those in positions of power, such as leaders in government and philanthropy, have traditionally tended to weight the former definition of expertise more heavily.) Comments from respondents suggest that both kinds of experts feel frustrated and threatened when their role in advocacy and policy work is de-valued – or de-funded. Respondents suggested the need for "both/and" approaches. Funders can mitigate tensions around power sharing by valuing multiple forms of expertise and supporting opportunities to collaborate in defining problems and developing appropriate policy solutions or advocacy approaches.

> " *We're the advocates, you're the impacted community. You know how this stuff plays out on you. We know a little bit about bending the sausage factory around. So what we're trying to share with you is techniques and strategies on how to do that part. And what you're trying to share with us is what impact it will really have on the ground and how you can get your community energized about this particular thing within the constraints of what we agree what might be possible.*

Overarching takeaways

Meaningfully connecting goes beyond input and feedback. Although gathering input or feedback from communities represents a valuable – arguably essential – component of effective advocacy and policy work, the concept of connecting is broader and deeper than the terms "input" and "feedback" imply. In advocacy and policy contexts, the definition of "meaningfully connecting" becomes entwined with goals like social, racial, and economic justice, and even societal transformation. For many who are engaged in advocacy and policy work, building community voice and power, and putting decision-making in the hands of those who are most affected by those decisions, is both the definition of connecting and an embodiment of those goals.

There are many different ways to meaningfully connect. The multiple definitions of what it means to "meaningfully connect" do not represent a continuum from less desirable to more desirable. Efforts to inform, listen, and co-create advocacy and policy work are all valid and valuable forms of connecting – and each can be done in a deep, meaningful way or in a shallow, inauthentic way. Organizations need not focus singularly on one model for connecting; they can thoughtfully draw upon multiple definitions and pathways for connecting that are appropriate to the type of advocacy and policy work that they do, their size and location, and their organizational history and capacities. What matters most: whatever combination of practices and pathways an organization chooses to pursue, *do it well.*

There is no silver bullet methodology or tool. It is unlikely that a single tool or method can encompass the multiple definitions of and pathways for "meaningfully connecting." Feedback surveys are a valuable staple in

direct service contexts. They may be an important tool in advocacy and policy contexts, but they do not fully represent the participatory principles that many advocates – and some funders – see as core to achieving transformative or systemic change.

Funders need to meaningfully connect. In general, respondents confirm that, to be effective in realizing their goals, funders need to meaningfully connect – directly and/or indirectly – with the communities they intend to benefit. What this means for different funders will vary, depending on their current practices. Some are just beginning a conversation on what might need to change; others have begun experimenting with new ways to support advocacy and movement building. Still others use grantmaking models that challenge traditional power structures in philanthropy. Whatever their starting point, funders need to think about connecting through a systemic lens, examining their own internal norms and culture, as well as the structures and processes that shape how strategies are developed, how decisions are made, and whose voice is valued.

There is ample room to strengthen nonprofits' efforts to connect. The "state of the field" regarding advocates' efforts to meaningfully connect may be described as relatively fragmented and uncodified. Although there are certainly many examples of "connecting done well," there appears to be wide variation in the depth and quality of listening practices. Indeed, some advocacy and policy organizations candidly acknowledged the limitations of their current efforts – and in most cases expressed a desire to address these limitations. They also noted various capacity-related challenges in trying to do a better job.

Funders can help nonprofits connect more meaningfully. Grantmaking approaches should reflect an understanding of the time, money, skills, and flexibility needed to build authentic (direct or indirect) connections with communities. Funds can be directed to support specific efforts to increase connectedness. Funders can create incentives by including questions in grant applications that ask how nonprofits connect with communities – and then using that level of connectedness as an important criterion in decisions about the size and composition of grants. Funders can also ask nonprofits what learning opportunities might best support their interest in learning about promising practices for how to thoughtfully engage communities in advocacy campaigns or policy work.

Introduction

Fund for Shared Insight is a funder collaborative seeking to improve philanthropy by elevating the voices of those least heard. Since its launch in 2014, Shared Insight has worked to help foundations and nonprofits be meaningfully connected to each other and to the people and communities they seek to help, with an emphasis on improving information sharing and strengthening feedback practices. Shared Insight has grown to include 94 funders investing in 243 nonprofits – most notably through its national initiative Listen for Good, a grantmaking and capacity-building initiative helping nonprofits implement systems for collecting and responding to feedback from the communities they serve.

To date, Shared Insight's work has focused primarily on direct service organizations. As it looks for opportunities to deepen and expand its work, Shared Insight is beginning to explore the role of feedback, listening, and connecting in advocacy and policy change efforts. It is in this context that Shared Insight commissioned this landscape scan.

The purpose of this landscape scan is to explore nonprofits' and funders' practices and perspectives on what it means to meaningfully connect with the people and communities intended to benefit from advocacy and policy work. It is intentionally open to diverse responses, without a predetermined definition of what "connecting" would look like in advocacy and policy contexts, nor presumptions about what might be needed to support connections – or if a need even exists. Shared Insight's efforts to apply a lens of equity, diversity, and inclusion to its work strongly informed this landscape scan, both in the design of the research and in the process of making sense of the findings.

The research findings are intended to inform Shared Insight's grantmaking strategy, and to contribute to the broader field's understanding of what it means to meaningfully connect with communities that are ultimately intended to benefit from advocacy and policy work.

Report Preview
▶ Research design
▶ Who is ultimately intended to benefit from advocacy and policy work?
▶ What does it mean to meaningfully connect?
▶ What are ingredients of meaningful engagement? What are promising practices?
▶ What are key challenges? Where are opportunities to strengthen practices?
▶ Conclusion

Research Design

Learning Questions

Focusing on U.S. private, staffed foundations and nonprofits working in domestic advocacy and policy contexts, this landscape scan aims to address the following learning questions:

1. What are foundations and nonprofits' current practices for listening to and/or meaningfully connecting with the people and communities that their advocacy and policy work is intended to benefit? What are promising practices or approaches? Where are there gaps or opportunities to strengthen existing efforts?

2. What are foundations and nonprofits' perspectives on what it means to "listen to" or "meaningfully connect with" the people and communities they seek to help? What is the role of "input" versus a "feedback loop" in advocacy and policy contexts?

3. Whom do foundations and nonprofits view as the group who is ultimately intended to benefit from their work? How does Shared Insight's focus on elevating the voices least heard manifest itself in advocacy and policy contexts?

4. How does the relationship between a foundation and its grantee shape their practices for connecting with those they ultimately seek to benefit?

Methods

Reflecting the exploratory orientation of the landscape scan, the research design focused on gathering qualitative data that could reveal not just the *what* of current practices, but also the *why, how,* and *for or with whom*. The research design, summarized in the box below, was developed in close consultation with a six-person committee representing the perspectives of Shared Insight's staff and four of its core funders. The survey and interview data were collected on a not-for-attribution basis; we only name organizations in specific instances where permission from the organization was obtained or the information was already in the public domain. Additional methodological details are provided in the Appendix.

Overview of Research Design

Interviews
- ▶ 21 individuals from 11 **funding organizations** varying in issue domain and geographic focus.
- ▶ Interviews with 24 individuals from 23 **nonprofit organizations**, ranging from small grassroots organizations to large national organizations.
- ▶ 9 individuals from 6 **organizations playing consulting or supportive roles** (e.g., evaluation, facilitation, strategy development).

Online Survey
- ▶ Approximately 6,000 nonprofits received a brief set of open-ended questions designed to supplement the interview data.
- ▶ A total of 224 nonprofits engaged in advocacy and policy work completed the survey.

Listserv Inquiries and Desk Research
- ▶ A "call for examples" sent to four listservs in the advocacy, evaluation, and philanthropic communities to gather examples of tools, frameworks, and other resources relevant to listening or meaningfully connecting in advocacy and policy contexts.
- ▶ Review of tools, frameworks, reports, and other resources surfaced through the listserv inquiries and interviews.

Scope of the Research

The landscape scan focuses in particular on US nonprofits and funders engaged in advocacy and policy work. This includes nonprofits engaged in a vast array of activities and target audiences, from public awareness campaigns to federal policymaker education, and from community mobilizing to litigation and regulatory feedback. And it includes funders who are supporting all of these activities through grants, capacity building, and other kinds of support. Cognizant of the diversity of organizations engaged in advocacy and policy work, we sought to include variation in terms of:

Funders who…

▶ Vary in terms of having a particular geographic focus or not;
▶ Focus on different levels, from local to state to national;
▶ Represent different kinds of institutions: public foundations, family foundations, venture philanthropy.

Nonprofits who…

▶ Work at different levels: local, state, regional, national;
▶ Do different kinds of work – e.g., policy advocacy, legal advocacy, policy research, community organizing, coalition building, advocacy plus direct service provision, advocacy capacity building;
▶ Include different organizational structures – e.g., membership-based organizations, organizations with local chapters, networks, coalitions.

The research design purposefully included interviews with a selection of Shared Insight's core funders and their respective nonprofit grantees. It also intentionally sought to reach a wider array of organizations outside of Shared Insight's immediate circle by using snowball sampling to identify additional interviewees, by sending the nonprofit survey to a nationwide list of nonprofits compiled by GuideStar, and by soliciting examples through the listserv inquiries.

This study is not intended to provide statistical insights based on a random sample of all nonprofits and funders working on US domestic policy and advocacy work. Rather, we sought to purposively sample organizations located in different parts of the philanthropic and nonprofit landscape, looking for evidence of what is more common as well as surfacing examples that are more unusual or even unique. In our analysis, we observed overlap across funders and nonprofits regarding how they think about meaningfully connecting and the practices they use; that is, there wasn't always a distinct set of "funder views" versus "nonprofit views." Correspondingly, many of the findings reported below reflect insights drawn from both kinds of organizations, though we note where particular points are specific to funders or nonprofits, where relevant.

Who is ultimately intended to benefit from advocacy and policy work?

In the context of direct service work, the answer to "who is intended to benefit" is typically clear: the clients. In advocacy and policy contexts, the answer could be defined in multiple ways. For example, in an education context, who ultimately benefits? Is it the policymaker who receives sound research and analysis that informs her curriculum policy decisions? Is it the teachers who are able to deliver more effective, child-centered classes as a result of that policy change? Is it the students who experience the impacts of a more tailored curriculum? Or in an environmental context, is it advanced energy companies who can grow their businesses as a result of regulatory changes? Or is it "everyone" because addressing climate change is intended to benefit the entire planet?

When asked whom their advocacy or policy work was ultimately intended to benefit, most interviewees named groups of "everyday" citizens who constitute or are part of "a community" in some shape or form. Many referred to broader categories of people – e.g., those living in a particular geographic region, students, teachers, families, farmers and ranchers, or "all creatures on the earth." Approximately 55% of the nonprofit and funding organizations included in the research specifically named marginalized groups, including racial and ethnic minorities, individuals with disabilities, low-income youth, English language learners, immigrants,

refugees, trans and gender non-conforming individuals, people with experience in the foster care system, and children impacted by trauma.

Some nonprofits and funders noted that other groups – such as policymakers, businesses, researchers, or journalists – were an important audience or end user with whom they engaged in order to advance the work. But only a very small minority (less than 5%) named these groups as those who were intended to ultimately benefit from the advocacy or policy work. As discussed in the next section, organizations that strongly (or almost exclusively) focus on engaging policymakers or others in positions of power as *audiences* or *end users* may be less well equipped to listen to and channel the voices of the communities these organizations intend to benefit from their advocacy.

In sum, when thinking about whom they ultimately intend to benefit, organizations tend to have in mind the "everyday citizens" who are supposed to experience benefits *if* the advocacy or policy work is successful in realizing its goals. But these groups are not "beneficiaries" seen only at the conclusion of an often complex advocacy or policymaking process, where they passively receive an intended positive policy impact. In many cases, as we discuss below, they are not simply the group that advocacy or policy work is done *for*; they are the group that advocacy or policy work is done *with* and *by*.

What does it mean to meaningfully connect?

The interviews and survey used a broadly framed question: *What does it mean to "meaningfully connect" with those you aim to benefit through your advocacy or policy work?* This allowed respondents to offer their own definitions of what "meaningfully connecting" looks like in the context of their work, rather than providing a specific definition focused on terms like "input" or "feedback." Those kinds of terms can imply a sense of distance between organizations and communities, which in some cases may not appropriately reflect how organizations are situated within and relate to a community.

The result of using this broadly framed question: respondents offered a diverse and nuanced array of perspectives on what it means to meaningfully connect with communities, which may be grouped into four broad definitions:

1. Reaching out to communities to inform them about policy issues and opportunities to take action;
2. Listening to communities to inform the organization's own advocacy or policy work;
3. Co-creating advocacy and policy work and shifting decision-making to people who represent or come from the community;
4. Building authentic and trusting relationships with communities.

Figure 1 (below) begins to unpack these definitions. **Informing** is focused on outreach to communities, with the intention of raising public awareness of specific issues and encouraging people to take individual actions, such as calling a member of Congress or attending a public hearing. This form of connecting is focused on educating and activating community members around an organization's priority issues, though it is sometimes paired with efforts to listen to and learn from the community as well.

Listening involves efforts to understand the priorities and perspectives of communities, which the organization then draws on as it develops its strategies and activities (e.g., legislative agenda, messaging or communication strategy, grantmaking strategy). Listening also includes efforts to create opportunities for communities to provide feedback on something, such as a draft strategic plan, proposed policy recommendations, or the impacts of a policy after it has been implemented.

Figure 1. Definitions of Meaningfully Connecting

Building Relationships				
The goal is to establish trusting, mutually respectful, transparent relationships with communities.				
Informing	**Listening**		**Co-creating**	
Providing information, encouraging action	**Seeking to understand**	**Seeking feedback**	**Training, building capacity**	**Co-creating, co-deciding**
The goal is to help the community understand an issue and take individual action.	The goal is to understand community priorities, perspectives, and experiences.	The goal is to listen to what a community thinks about an idea, strategy, proposal, policy, etc.	The goal is to equip communities with the capacities needed to lead/co-lead advocacy or policy work, and to strengthen the capacity of organizations to receive diverse voices.	The goal is to give communities decision-making roles in developing, managing, and implementing advocacy and policy work.
This kind of outreach occurs as part of organizations' efforts to raise public awareness of an issue and encourage community members to respond to discrete calls to action.	Listening occurs when an organization wants its strategy, agenda, campaign, etc. to be informed by an understanding of the issues that communities prioritize and how they experience and think about those issues.	Listening occurs when an organization wants feedback on something – e.g., a draft strategic plan, proposed regulatory changes, or a policy that has been implemented.	This can take the form of leadership development, policy or advocacy training, and organizational capacity building around equity, diversity, and inclusion.	This includes co-creation processes and participatory governance and decision-making structures. It also includes putting community members in staff and leadership positions.

Co-creating shifts community members into a decision-making role. It is not about gathering information *from* communities or providing information *to* communities; it's about creating the advocacy and policy work *with* communities. This includes establishing participatory decision-making processes and governance structures. It also encompasses organizations' efforts to hire people who are from the communities that are intended to benefit from the work. Capacity building is an important part of this definition. It goes beyond informing the public and encouraging people to take action; there is an emphasis on providing training and systematic support for community members to effectively lead or co-lead the work. Co-creation also involves strengthening the internal capacity of a funder or nonprofit to effectively receive and be influenced by diverse voices and perspectives.

Relationship building arcs over the other three definitions because it is a fundamental part of listening and co-creating in meaningful and authentic ways. Done well, efforts to inform communities are also grounded in relationships that nurture a community's willingness to trust and act on the information offered.

Figure 1 is not a rigid typology of how organizations connect with communities, nor a continuum ranging from less desirable to more desirable forms of connecting. A defining characteristic of what it means to meaningfully connect in advocacy and policy contexts is that organizations can create *layers* of connections that may unfold simultaneously. For example, an advocate might survey community members to learn about the issues they most care about ("listening"), while also deeply engaging a smaller set of members in developing and managing advocacy campaigns ("co-creating"). Of course, there is wide variation across organizations in terms of how many layers are created and the depth of connections that result – in part determined by the organization's size, the nature of its work, and the degree to which it is "embedded" in a community. Figure 1 describes each definition in its "ideal" form; in practice, some organizations inform, listen, co-create, and build relationships in more intentional and meaningful ways than others.

Another key feature of the landscape of "meaningfully connecting" in advocacy and policy contexts: there are both direct and indirect pathways through which organizations listen to or engage with communities. Figure 2 (below) shows a simplified ecosystem of connections among different groups of actors. The overlapping circles illustrate the fluid distinctions among the groups. For example, local advocates and community leaders might be members of the marginalized group that a policy is intended to benefit, or educators might be included among those that an education grantmaking portfolio is intended to benefit. The distinction between "large or national advocates and policy organizations" and "local advocates" is also somewhat flexible. The former category is intended to represent larger statewide and national nonprofits, which are not typically "of" the community in the same way as local organizations established and run by community members. But there are cases where, for example, a national organization's local chapter work is led by people from the community who set their agenda with significant autonomy.

The arrows represent the ways in which each set of actors can connect with other actors in the ecosystem – with the purpose of either directly or indirectly connecting with the communities that are ultimately intended to benefit from advocacy or policy work. Figure 2 represents the various *potential* direct and indirect pathways through which organizations connect; each path is grounded in examples surfaced through this research, but organizations vary in terms of which paths – and how many paths – they choose. For example, some funders seek to directly connect with the communities they intend to benefit, while other funders engage with groups such as nonprofit grantees or community foundations that are viewed as closer to communities to learn indirectly about community perspectives.

Similarly, large or national nonprofits use both direct and indirect pathways to connect with the communities they intend to benefit. For example, a large environmental organization engaged in legal advocacy described its efforts to connect with local environmental justice groups to help it understand a community's

perspectives on problems and solutions. A statewide organization advocating for equitable education explained how it turns to direct service providers working with foster kids or serving families in poverty to better understand the challenges faced by hard-to-reach populations. A research organization working to influence education policies and systems noted how it has partnered with an organization that has specific expertise in engaging youth in community research action projects; in that case, the research organization interacts with the intermediary organization rather than directly with the youth.

Figure 2. Potential Direct and Indirect Pathways for Connecting with Communities Intended to Benefit from Advocacy and Policy Work
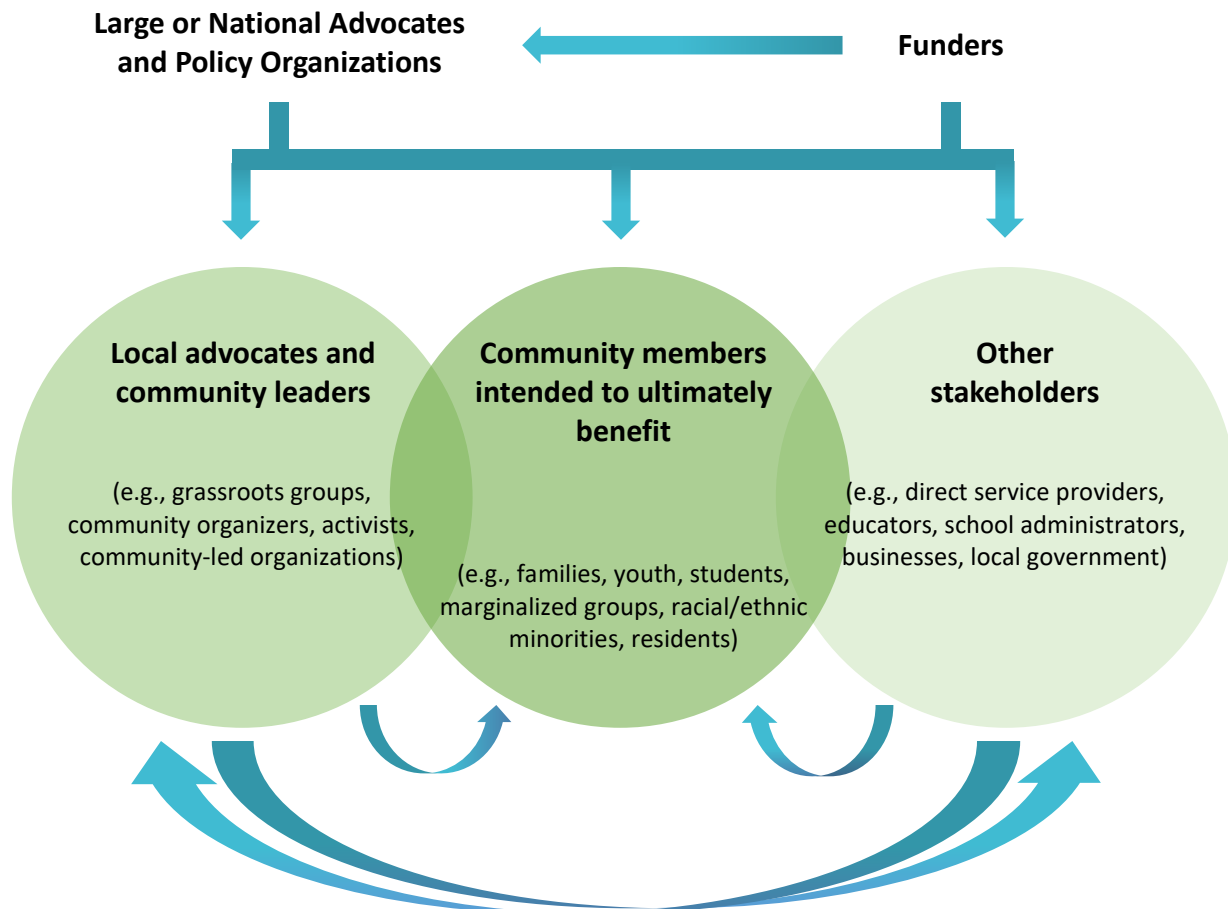
Grassroots organizations typically connect directly with communities – or in some cases are led by staff or volunteers who are members of the community themselves. Organizations that are "of" the community in this way may be viewed as a close proxy for – or perhaps even the same thing as – connecting with individual members of the community. Where needed, these organizations sometimes connect with other stakeholders, particularly direct service providers, who can facilitate access to marginalized or hard-to-reach populations and help provide insights into their perspectives and experiences.

The vast majority of nonprofits and funders who participated in this research described at least one way in which they directly or indirectly connect with the communities they ultimately intend to benefit. Indeed, many organizations included in this research rely on more than one path for connecting – that is, they follow multiple arrows in Figure 2. However, some organizations seemed to be somewhat "disconnected." That is,

they reported that they had limited or no direct interaction with the groups they ultimately intend to benefit, and did not mention any indirect means through which they listened to community perspectives. Perhaps the best illustration: a foundation interviewee who described an experience managing an education policy portfolio. The focus, the interviewee explained, was on understanding policymakers' perspectives as end users and target audiences, rather than understanding the perspectives of those the policy work was intended to benefit.

> *If I think back over the past 8 years of policy advocacy work… the question I would ask of grantees is not whether they understand students and communities of color, but if their job is to get money to do research and publishing around evidence-based policymaking, did they take into account how policymakers used that data, want to see that data, hear about that data, engage with that data… The students are very indirect elements of any of the proposals that have been brought to me…. For most of my grantees, students were fairly inauthentically engaged as entertainment. So you have a bunch of students in the same shirt singing "I believe I can fly" at the reception of a policymaker conference. That is pretty much how students were engaged.*

This kind of response was relatively infrequent – perhaps reflecting growing recognition of the need to include communities in efforts to design and advocate for solutions that are intended to benefit them. Indeed, the foundation whose past practices are described above has begun placing a stronger emphasis on connecting with communities, both directly through on-the-ground listening efforts and indirectly through its grantees. But even if the policy advocacy field is shifting in this way, there is still wide variation in how – and how deeply – community voices are folded into the work. In the following sections, we explore the diverse examples of how and why funders and nonprofits connect with the communities they intend to benefit.

Practices for Informing Communities

Some nonprofits and funders include outreach as part of how they define what it means to connect with communities. These outreach efforts seek to inform community members about policy issues and opportunities for them to take action – for example, by distributing accessible information about a policy debate, updating community members on current issues, and encouraging them to respond to calls to action such as calling an elected official or attending a district meeting.

This form of connecting with communities can seem unidirectional in some ways, with information flowing from the organization to the community. For example, educational efforts in the form of emails or action alerts, reports, presentations, and social media awareness building are more oriented toward pushing information out to communities, rather than engaging in a meaningful two-way exchange with community members. And in some cases, asking community members to take isolated actions without engaging them in any other meaningful way can carry the risk of tokenism – they are asked to share their story at a hearing, for example, but they have had no opportunity to weigh in on the ways in which an advocate has framed the problem or the policy solution.

But there are also examples that illustrate greater intentionality and purpose, particularly when efforts to inform are paired with the goals of listening to communities or engaging them in the advocacy process. For example, one advocate described how her organization takes community members on field trips to help them understand what a particular policy solution looks like in practice:

> *We've taken people to see how others do the work on whatever the issue is. For example, we took parent leaders, school district leaders, and a legislator or two to Baltimore to look at how they changed the way they approached [school] discipline. On the charter school issue, we took parents and parent*

leaders out to different places to learn what the schools look like and how the system could be implemented here. So we try to show people. And sometimes that is more impactful.

Another example: the [People's Budget Game](#), an online simulation exercise designed to help community members understand the city's budget process – while also serving as a vehicle for improving government responsiveness to community perspectives. Developed by a local nonprofit called the Committee to Better New Orleans, the game gives people a chance to indicate how they would allocate the city's budget, within the same constraints under which city officials would be working. Users learn what is – and is not – part of the city's budget process, which helps them express more meaningful input about how they would like to see city resources used. The nonprofit uses the data collected through the game to advocate to the city government – and more recently, to involve city councilors in hosting community events where they directly interact with constituents as they play the game.

One funder's efforts to meaningfully connect with communities include raising awareness about "wonky" policy issues. For example, when a research report is produced, the organization tries to find ways to make the findings accessible to people who are not steeped in the technical details of policy debates – such as through 2-3 minute videos or two-pagers with good graphics. This is part of an effort to build awareness among community members, grounded in the belief that helping people grasp complex challenges facing, for example, public schools strengthens their ability to have a voice in demanding high quality schools. This funder is also implementing tangible, on-the-ground pilots to engage residents in transportation policy:

> *Instead of producing a paper that says you could do this thing, and here are the benefits that you would receive, and this is what it would do for your community, we've been funding organizations and municipalities to do pilot projects where transit riders are able to experience what it's like as opposed to looking at it on paper or looking at a rendering. The results so far are certainly getting media attention, which is not a bad thing for reaching an even wider audience. And it's getting everyday people who experience a faster bus commute to pick up the phone or speak out to say: we don't want this pilot to go away, or we'd like this pilot to be changed like this and it would save everyone on this bus 10 minutes. So one of our next steps after the wonkiness has been putting things like this on the ground.*

As these examples illustrate, some organizations see outreach efforts as more than simply one-way communication about complex policy issues; "informing" communities can stimulate a reciprocal flow of community perspectives and help communities take part in advocacy efforts or policy debates.

Listening Practices

In relating how they meaningfully connect with the communities they intend to benefit, funders and nonprofits most commonly described listening efforts intended to inform their own organization's thinking or actions in some way. We observed five main categories of approaches used in this listening process: traditional research methods, such as surveys and focus groups; meetings and conversations that take place within a community setting; interactions occurring during the course of direct service or programmatic work; convenings; and advisory groups. Most respondents reported listening through multiple mechanisms.

▶ **Traditional Research Methods**

Roughly a quarter (23%) of nonprofits and funders included in this research reported using traditional research methods – most commonly surveys, though also focus groups, interviews, and literature reviews – to listen. Typically, organizations drew on these research methods to learn about community members' priorities and their thoughts about relevant issues. For example, an interviewee at a large foundation focused

on education described regular surveys of teachers to learn about their priorities and how they talk about issues relevant to the portfolio's goals:

> *Connecting more with teachers and school leaders, who are one of our audiences. We regularly survey those groups to see where their priorities and perspectives are… Is this an issue that is salient with teachers? What's their perspective and how can we use that to guide our communications guide? When we talk about language and messaging, are we talking about it in a way that teachers are already talking about it?*

Other examples include nonprofits' surveys of their direct service clients (insights from which inform advocacy or policy work); national advocates' surveys of their local chapters; and grassroots advocates' surveys of community members. Among the organizations who mentioned using traditional research methods, nearly all described other complementary mechanisms through which they also listened to or engaged with communities.

▶ **Listening Opportunities within Community Settings**

Respondents described diverse kinds of conversations, discussions, and interactions that take place within community settings with the goal of listening to community members' perspectives. Among nonprofits, typical listening mechanisms are community meetings or forums, town halls, educational events, one-on-one meetings, and door-to-door knocking. Some of these activities use more structured formats, while others take the form of more informal conversations. One structured approach to using large community gatherings for listening purposes is a visioning session, described this way by a nonprofit advocating for families experiencing homelessness and housing instability:

> *The way we get our policy priorities is through the visioning day that we have each summer. It's an annual convening of about 150 families in shelters, as well as shelter providers and other stakeholders from across the state. At that event, we collect input through ballots, breakout group discussions, table activities, interactive activities, feedback and input forms, and video interviews. The staff synthesizes that information, and that makes it clear what our primary focus areas will be.*

The ballot includes questions such as "*What are the resources you need?*" and "*What are the biggest issues that are creating barriers?*" Taking care to focus on families' answers when analyzing the ballot results, the organization uses this information to help identify, for example, where it should advocate for more money or where it should advocate for rule changes. Additional approaches to facilitating community discussions, surfaced through suggestions from nonprofits and funders, are provided in the **Resources** box to the right.

Resources: Methodologies for Facilitating Community Discussions

▶ A toolkit covering multiple community engagement tools, including visioning workshops.

▶ A brief set of guidelines for conducting visioning exercises.

▶ A description of the World Café methodology, an approach for hosting large group dialogue.

▶ A resource called Liberating Structures, describing approaches to facilitating various kinds of group discussions.

▶ A brief overview of how graphic recording and graphic facilitation can help support productive group discussions.

▶ A description of Art of Hosting methods for dialogue and conversation, including Pro Action Café and Open Space Technology approaches.

▶ An overview of how to use Collective Story Harvest.

Funders vary in whether and how they seek opportunities to connect within community settings. Some funders whose grantees are deeply rooted in (and are considered "of") the community do not feel they need to go into community settings to meaningfully connect. For them, listening to and engaging with their grantees is more or less the same as hearing from "the community." Other funders seek opportunities to go into the specific neighborhoods and spaces where the people they seek to help live, work, and play. With this group of funders, the depth of the listening exercise varies. Some interactions represent relatively limited opportunities to listen; the purpose may in part be to help "put a face" on complex policy issues. For example, one foundation interviewee described how the organization's leadership visits schools to hear students' stories first-hand:

> *Hearing those stories directly from students puts things in perspective for people – and they come back to our team and all of us are able to learn from them. I wouldn't say there is anything concrete new that is learned. They are not particularly meant to alter the decisions we make. They are more to put a face on our issues. At least from my perspective, that doesn't feed into our decision-making.*

But there were also more in-depth versions of this kind of listening effort. For example, a foundation interviewee working on conservation advocacy and policy work described her participation in meetings and field trips as a valued opportunity to learn what stakeholders care about and why, deepen the foundation's understanding of the issues, and inform its strategy:

> *I went with a couple of grantees to sit down with a falconer in a rural area in southwest Wyoming who has for decades been studying the greater sage grouse – a little chicken-like bird who lives out there and is deeply threatened by development. In the process of getting up at 4 am to watch these birds do their mating dance, we got to see what inspires him about these birds and why he fights so hard to protect them and why they are special. And then we met with sportsmen who are concerned with the landscape that the birds share with game species like mule deer, and we got to hear how the bird and deer come together in their culture… It's really exciting and it's a great way to broaden your thinking about what people bring to the table, why they are at the table, what their arguments and needs are, and how we could be a better partner.*

Another approach: make grants to community organizations that can conduct listening sessions in communities. As a foundation interviewee explained:

> *The grants were made to do listening. We were specific about the learning questions we were trying to get feedback on, which we gave out to all of these partners. So everyone started with the same questions. But when we gave it to a media outlet to use with a Hispanic community, they may have added or tweaked or translated it in ways that a person at the Foundation would not have. And that was part of the goal too: we needed folks who were culturally competent to be able to pick up these answers in a way that made sense. We didn't want to be driving the conversation. We wanted to hear from people literally where they started the conversation.*

▶ Listening in the Context of Providing Services or Programs

Some nonprofits that engage in advocacy or policy activities are also involved in direct service provision or other kinds of community programs or projects. This direct service or project work often provides unique and valuable opportunities to listen to and understand community perspectives and experiences. As one nonprofit respondent explained:

We also do direct service work (legal services, a helpline, technical assistance) and community education (free workshops and trainings), and our policy agenda is rooted in what we see on the ground working with families (i.e., we're getting a lot of calls from parents about the same issue/problem, so in addition to working with those parents individually, we try to address the issue more systemically by talking to policymakers, pushing for additional funding or new programming, etc.).

▶ **Conferences**

In a few cases, nonprofits and funders mentioned that they use conferences or third-party convenings as listening opportunities. For example, one interviewee working on conservation advocacy noted that he attends annual meetings of growers and cattlemen to listen to their thoughts on policy options. Another interviewee working on environmental issues at a foundation described how she attends a grantee's annual convenings of sporting groups to better understand what this constituency cares about and to hear how conservation comes up in the conversation.

In explaining why these kinds of gatherings are a useful listening opportunity, an education advocate emphasized the value of "putting yourself in situations where you can listen to what they have to say":

A lot of times I'm invited to conferences where I speak; sometimes I just go to listen. Making sure you're consistently taking time to hear what conversation is among the community that you seek to serve is so important as an advocate. When you forget to do that, that's when you lose touch.

▶ **Advisory Groups**

Advisory groups represent a more institutionalized listening mechanism. They establish a formal structure through which an organization can solicit regular community input or feedback. Examples include issue-based advisory committees, advisory bodies that provide feedback on policy recommendations, and broader advisory groups offering insights into the perspectives and experiences of community members.

▶ **How Listening Informs Organizations' Work**

What happens after listening? Among nonprofits, a common response is that staff draw on insights into community priorities and experiences as they develop the organization's advocacy agenda, policy priorities, communications strategy, and messaging. In a more unusual and striking example, an education advocate described how issues raised through his organization's helpline and through conversations with parents ultimately led to a new policy initiative:

In 2001-2002, we started to get lot of calls through helpline from families with kids with Autism. This was before Autism was a household word. We recognized that there was something going on here that we were not sure about. It didn't fit in the general category of disabilities that we had worked with. As a result of these calls and talking to parents, we created a separate Autism Center. We had never done that before: a project that is specific to one disability as opposed to all disabilities. So that profoundly changed the way we approached a particular issue – because of the calls we were getting, and talking to parents, trying to understand what this was and how this was affecting kids, and understanding that this was different from other disabilities.

Listening also informs organizations' understanding of the problem that needs to be solved and how to solve it. As one advocate explained, it is particularly important to hear community perspectives "at the beginning" in order to "get the rest of it right."

If we don't get the beginning right, we don't get the rest of it right. Whatever the problem is we think we're trying to solve, we talk to the people who are most impacted by that so-called problem to hear what their experiences is, and how they identify the solutions… School discipline is a good example: we had 500 conversations with parents and community members that we tracked [in our database]; we learned a lot about how discipline was impacting students of color and ELL [English language learner] kids, to name a few. And then working with their caregivers, parents, or agencies, we sought to better understand why that was happening or what were the common traits.

These examples of listening are focused on **seeking to understand** community priorities and experiences, which then informs the nonprofit's plans or activities. Some nonprofits go beyond this level to **seek feedback** from communities about the specific plans, strategy, or solutions that the organization is proposing. Interestingly, nonprofits included in this research rarely used the language of "feedback loops." However, we observed interesting examples of how community feedback manifests in advocacy and policy contexts. In the above case on school discipline, for example, the advocate also sought community members' feedback as the school discipline policy was being developed, offering additional opportunities to shape the advocacy effort's objective: changes in specific rules.

Similarly, a representative of a coalition of youth-engaged organizations described an array of community input mechanisms (e.g., community input sessions, a youth leadership committee, focus groups) used to inform the coalition's development of advocacy campaigns and policy solutions, and then emphasized that the coalition "turns back" to community members and partners to "vet these campaigns and solutions." This advocate further noted: "folks are best equipped to act quickly when we're able to bring them a set of options (for any of these advocacy activities) that they can respond to; we then adapt based on feedback; and then mobilize our constituents to act." This additional step of "turning back" to the community for a vetting process and giving them something to *respond to* corresponds to "closing the feedback loop," especially when it is repeated.

A policy research organization described a similar process of soliciting community feedback on policy solutions, but through the lens of a startup: "Our M.O. for policy advocacy is to approach it like we would a startup developing a product: We develop a policy that we think will solve a problem, and then go get as much "customer feedback" on that policy as possible by talking with not just the groups that would directly be influenced by the policy, but also with academics, other NGOs, and policymakers."

Feedback can also occur as part of a nonprofit's process for developing its broader strategic plan. For example, over the course of a year and a half, one membership-based organization solicited input from its local chapters through a survey, did presentations at regional conferences of its chapters, and gave chapter leaders opportunities to provide feedback on draft elements of the plan. This helped ensure "good alignment" with local chapters' perspectives when the plan was finalized: "We didn't hear from anyone: gosh, where did this come from?"

A final form of feedback: asking communities about a policy's impacts *after* it has been implemented. As one advocate observed, it may be relatively less common for this to happen – or at least for it to be done in a meaningful way – either because feedback is sought prematurely before a policy can reasonably be expected to have changed conditions, or because feedback is sought from stakeholders who are not the ones most affected by a policy (e.g., consulting superintendents or school board members, as opposed to students, families, or teachers). This advocate described an example where researchers from a national policy research organization evaluated an equitable funding law: "Their findings were so starkly different from what organizations that work with communities were seeing. In the accuracy of the information, this is

problematic." The same careful listening process that is used upfront to inform policy development, she noted, can and should be used to evaluate the impacts of policy changes.

Among funders, interviewees most often noted that listening helped them understand how community members think or talk about issues, what they care about, and the contexts and spaces in which they live and work. Going a step further, a few foundation interviewees explained the strategic implications of their listening efforts. For example, one observed that the impetus for diversifying the portfolio to include a broader array of groups was "the direct result" of being on the ground talking to groups in the community: "That wouldn't have happened as much if we had just continued to talk with same old grantees that we've always worked with in the past." Another foundation interviewee noted how "listening directly" to people in communities is a new practice for the organization, which previously relied on grantees and intermediaries for these insights. This listening effort is intended to inform the foundation's strategy refresh.

As these diverse examples illustrate, the depth of listening efforts – and their impact on organizations' thinking and actions – vary widely, from a relatively light-touch approach to much deeper engagement. As we move into the deeper forms of listening, where community members' voices exert a stronger influence over the organization's work, we begin to shift towards a different definition of what it means to meaningfully connect. Rather than being in a more reactive role of providing contextual information, input, or feedback when asked, community members take on substantive roles in *creating* the organization's work. In the next section, we explore these co-creation practices in detail.

Co-creation Practices

As we have seen in some cases, organizations can "listen" in ways that intentionally create a close and iterative connection with communities. No bright lines separate these cases from those in which community members *co-create* advocacy and policy work – nor are there shared definitions among organizations about what qualifies as "co-creation." **Decision-making power**, however, is one way to distinguish between examples where community members are consulted or given the opportunity to advise – but do not ultimately make the decisions – versus examples where community members *are* the decision makers and co-creators of the work. As one interviewee pointed out, there is a difference between providing input or feedback and truly "being at the table":

> *We often ask for input. And then we turn around and we say: did we respond to your input? That doesn't mean you have any power; you're not making any of the decisions, your voice isn't growing, you're not at the table when decisions get made. So I think there's a real difference. Even if an organization changes, it's who has the decision-making power, who's at the table, who is informing the decisions in a consistent way. So it's not saying: we're going to check with you… and then someone interprets what they say. I'm not saying that's not helpful or that it doesn't offer some important information. But there can be unintended consequences unless people are really at the table and have some power.*

What does it look like to "be at the table"? Below we discuss several approaches designed to enable community members to exert real power over the development, management, and implementation of advocacy efforts.

▶ Approaches to Co-developing Advocacy Strategies

Organizations use varied approaches to co-develop advocacy strategies with community members. Organizations may embed co-creation into partnerships with grassroots groups who represent the

communities that are intended to benefit. That is, the partnership's structure reflects the expectation that grassroots groups will have an equal voice in co-developing the advocacy work.

For example, one policy advocate working on civil rights and social justice issues described the ways in which community groups should be part of the process of determining whether and how to move forward on an advocacy effort:

> *In a lot of cases, we find if you go in with a full idea, the groups will hate it. It's usually more a question of: how do you define the problem? And then: here are some possible ways we could try to make some progress. It's usually better to go in with more than one idea. If you go in with a bill you've already written, it's almost never going to work… From a community group's perspective, you're trying to just get token community support for something you've already decided you're going to do. So "get on board" isn't really the question. The question is: do you share these concerns, and if so, would this vehicle make sense or not? Would this approach make sense or not?*

Moreover, this same advocate emphasized, community groups need to be the ones to decide what "the bottom line" is when engaging in legislative advocacy:

> *You have to look at what you will not give away in a process, what's the bottom line, what is the thing on which there is no compromise or the grassroots group will feel totally abused. Whatever that turns out to be, that has to be the bottom line… Because a lot of what grassroots and community groups bring to the table is their own lived experience, you don't want to get into a situation where you're basically asking people to cry on cue in order to meet a set of objectives that are yours not theirs. I think that happens, and I think it is trust-destroying. If you're going to ask people to dredge up painful experiences and things that have happened to them and people they love in the interest [of] policy advocacy – which you are because good policy advocacy kind of requires that – then there really has to be an agreement on where the boundaries are. Otherwise it's just exploitative.*

Another example of a joint process for strategy development comes from the California Civic Participation Funders (CCPF). A collaborative that emphasizes the value of partnerships and grassroots voices, CCPF published a report documenting lessons learned from five years of working with local organizations to increase civic engagement and leadership among underrepresented groups. One of the key takeaways: "let local groups lead with their issues, not yours." The funders took a "non-prescriptive" approach allowing local groups to decide what issues they wanted to work on, and then used a "co-design" approach that brought the local groups and CCPF representatives together to brainstorm strategies. From the funders' perspective, this approach helped build more lasting partnerships and more sustainable local movements than, for example, "coming in and forcing people to work on short-term campaigns" the funders wanted to see.

Other organizations establish **committees or councils** as a mechanism for engaging community members in co-creation processes. This is different from the advisory roles that community members might play in the listening efforts described earlier. Here, the group plays a decision-making role in defining the policy advocacy work, and often participates in its implementation. This kind of decision-making structure is used by some membership-based organizations, where a sub-set of members will serve on committees that provide leadership and direction to the broader organization.

Two additional examples come from organizations focused on youth, particularly those in marginalized groups. The National Network for Youth has established a National Youth Advisory Council comprised of about 30 youth leaders who have experienced homelessness and/or human trafficking. These individuals are responsible for developing policy recommendations that help define the organization's advocacy agenda.

Participation on the council includes capacity-building activities to strengthen the members' advocacy, policy, and leadership skills, as well as opportunities to meet with policymakers and other stakeholders to advocate for their policy agenda.

The second example comes from outside the US – but in a closely related context. From 2011-2017, the Vancouver Foundation hosted two policy advocacy initiatives, one focused on immigrant and refugee youth, and the other focused on the transition from foster care to adulthood. To ensure that these initiatives deeply reflected youth perspectives, the foundation created two youth advisory groups comprised of young people who were immigrants, refugees, or had experience in the foster care system. The youth advisors met regularly to develop an understanding of the policy landscape and policy change processes, and to define the policy issues that were both important to them and were realistic targets for effecting change. Working in close collaboration with foundation staff (including program managers with lived experience as immigrants or former foster care youth) and adult allies experienced in working with youth, the youth co-created the initiatives' goals, strategy, and workplans, and participated in implementing advocacy activities.

Resources: Guidance on Co-creation

▶ Bolder Together 2: A report describing the California Civic Participation Funders' experience with co-creation and partnership approaches.

▶ The Vancouver Foundation's Youth Engagement report on lessons learned from its use of youth advisory groups in advocacy initiatives.

▶ Building Effective Youth Councils: A guide from the Forum for Youth Investment describing key steps for creating effective youth councils, along with concrete examples. While the guide focuses on youth engagement in government, much of its contents is relevant to nonprofits or funders seeking to establish advisory councils of either youth or adults to inform or co-create advocacy and policy work.

▶ From the Bottom Up: A report examining how membership-based organizations can engage more intentionally with community members. It includes concrete examples of three inclusive decision-making models: collective governance structures, consensus and modified consensus decision-making, and special advisory boards.

▶ Community-Engagement Governance Framework: An article describing a framework in which responsibility for governance is shared across an organization's stakeholders, including its constituents and community.

▶ **Community Organizing Approaches**

Community organizing often emphasizes community-led processes for making decisions. Although community organizing approaches differ in how inclusive the decision-making process actually is, we observed examples of organizations whose approaches are designed to transfer decision-making power to community members.

One example is a national organization engaged in student organizing on college campuses. Using a "student-directed structure," the organization recruits and trains students to develop and run campaigns on the issues they think are most important to their peers. Each semester, students on each campus go through a campaign selection process, which involves surveys of peers, consultations with other campus stakeholders, and facilitated brainstorming sessions to surface the most important and strategic issues to focus on.

Organizer staff provide advice and training, but "the students are the ones running the campaigns." In addition, student members on each campus elect a few of their peers to sit on a state board of directors, which is responsible for hiring an organizing director. These board members also participate in a national forum to discuss issue priorities and opportunities to cooperate on national campaigns. A representative of this organization emphasized that students – not the organization's staff – make the decisions:

> The one axiom of community organizing is that you're organizing yourself out of a job. If you're leading from behind, and being an effective community organizer, students are the ones who are at the front. They're the ones having the big meaningful discussions about what our vision is for the next year and how are we engaging in the campus… And not just having them _involved_ in decision-making; have them _make_ the decisions. When we have statewide student board meetings, there is a certain number of votes allocated to each campus. The organizing director is the facilitator of the conversation along with the statewide student chair. But only students have a vote; organizer [staff] don't have a vote. So if I were to make recommendations for other groups on how to meaningfully work with communities: one is giving the decision-making power to communities you're organizing.

Similarly, a statewide grassroots group seeks to advance educational justice by building the power of youth of color. Working with approximately 250 high school students across 12 schools in four districts, the organization focuses on building their capacity to become youth leaders deeply engaged in shaping advocacy campaigns, both within and across school districts. To ensure that advocacy efforts reflect the kinds of voices that are not typically heard, the organization seeks out and engages students who are marginalized and who are not typically represented in leadership groups like student councils. A representative of this organization described how these youth led the development of a recent campaign. The process started with students defining the research question: _what is the most important resource that students of color in particular need?_ They then developed and conducted a survey of 2,000 students across the four districts. To analyze these data, groups of 10-30 students worked in a "focus group style" format to surface key insights and identify potential options for the campaign. At a decision-making summit, about 60 of these youth, along with 40 adults representing different aspects of the education system, came together to discuss and vote on the options.

As this interviewee noted, "out of that decision-making meeting we landed on the focus of this campaign, which was relationships and connections. It was a big leap of faith because that was not at all, at that moment in time, what the field was saying was a priority." This comment reflects a point made by various other interviewees: when given a chance to define advocacy work, community members sometimes choose a direction that is quite different from what an advocate, funder, or the broader field might have chosen. This point is related to questions of power sharing and how organizations respond when they disagree with the communities on the right path forward – questions we return to in later sections of this report.

▶ Participatory Grantmaking

Participatory grantmaking puts community members directly in decision-making roles. As described in a recent Foundation Center report, this model centers on the belief that "the people who are being most affected by decisions have a right to make those decisions." It focuses in particular on the process of how grant decisions are made and by whom.

One example is the [Haymarket People's Fund](), a New England funder that supports grassroots organizations working on social justice issues. The funder's grant decision-making body is a volunteer panel made up of 18 community organizers, the majority of whom are people of color. Panel members serve a three-year term, and are tasked with the responsibility of reviewing applications, interviewing applicants, and making funding

recommendations. Staff play a coordinating and support role, while the Board of Directors provides final approval of the panel's nominations.

Another example is the Trans Justice Funding Project, which employs community-led grantmaking panels. Each year, a group of six trans and/or gender non-binary activists from across the country are invited to serve as members of the panel. They are responsible for reviewing all the applications, voting online, and then coming together for an in-person meeting to finalize decisions and award amounts. TJFP staff do not have a say in the decisions; rather, their role is focused on supporting the panel members. For example, they facilitate video chats as well as the final in-person meeting to help build trust among members, and to help them reflect on their values and how to take on the responsibility of making funding decisions. In recognition of the level of commitment required, TJFP pays the members of the panel.

> **Resources:**
> **Participatory Grantmaking**
>
> ▶ Deciding Together: Shifting Power and Resources through Participatory Grantmaking: An in-depth resource describing the core elements of participatory grantmaking, benefits, challenges, decision-making roles, and sample models.
>
> ▶ Mechanics of Participatory Grantmaking: Concrete descriptions of how individual funders have set up the participatory process.

The Chorus Foundation uses a "democratized grantmaking process" to make grant decisions supporting the local ecosystem in each of its four focus communities. The foundation has a small set of "anchor" grantees – primarily multi-issue membership organizations working in the focus communities – to which it has made 8- to 10-year unrestricted funding commitments. These anchor grantees co-design the process for making grants to other organizations that help support movement building in each local ecosystem. In some cases, the grantees indicate they'd like to play an advisory role in shaping the grantmaking process; in other cases, they propose a more robust role of deciding where funds should go. The Foundation sees this approach as a way to "share or hand power back to communities from which wealth has traditionally been extracted."

▶ **Capacity Building as a Key Component of Co-creation and Co-decision-making**

These kinds of co-creation and co-decision-making approaches often incorporate efforts to build the capacity of community members to contribute to or lead the advocacy or policy work. This capacity-building work goes beyond informing community members and encouraging them to take individual action. It involves an explicit effort to train or support community members so that they are well-equipped to play meaningful roles in defining and implementing advocacy and policy work.

This kind of capacity building is often built into community organizing models like the ones described earlier. As one advocate explained, leadership development is a "cornerstone" of youth engagement – or engagement with any community members, including adults:

> *We define leadership development as focusing on being confident, believing your voice matters, how to practice critical thinking in the context of making policy conversations. That leadership development is something we do with every new and continuing youth member. Even in just a school setting: if you were going to form a steering committee of community members, or even community nonprofit leaders like myself, including a day-long institute first to help people build relationships and feel more confident about what they're going to talk about, and then go into the feedback or decision-making spaces. If you're really serious about applying an equity lens, that's what it's going to take. Not everyone has the same starting point when it comes to voice. So what do you need to do to really uplift the voices that often aren't heard?*

As this comment suggests, leadership development is an important part of ensuring that the "voices least heard" are able to have a meaningful place at the table. Indeed, this idea is reflected in the practices of nonprofits beyond those specifically focused on community organizing.

For example, the state-wide policy advocacy organization Homes for Families offers parents who are experiencing homelessness the opportunity to participate in a curriculum-based public policy series, which explains how the state budget process works, lobbying, organizing, and awareness raising. The series typically concludes with some form of action, such as actions at the State House or opportunities to participate in a focus group. The Consumer Advocacy Team (CAT) is an optional next stage for families who wish to become more involved and integrated with the organization and to expand their leadership opportunities. CAT members meet on a monthly basis to engage in additional training and learning opportunities, and to vet the organization's advocacy strategies and initiatives. They play key roles in processing broader family feedback, and in planning, executing, and evaluating all major events, including the organization's Lobby Day at the State House. CAT members also have opportunities to serve on boards and other decision-making bodies in the community, complete internships, and participate in coalition work. CAT serves as a pipeline for the organization's board, which is mandated to have at least 50% of its members be families who are experiencing or overcoming homelessness.

Some funders incorporate capacity building into their practices for engaging community members in advocacy and policy work. The Vancouver Foundation's youth advisory groups and the Trans Justice Funding Project's community-led grantmaking panels – described earlier – include capacity-building components to help prepare community member for their roles in decision-making.

Other funders offer capacity building as a complement to funding in order to help strengthen local organizations with deep community ties. The Chorus Foundation, for example, looks to its anchor grantees to indicate what capacity-building and training opportunities will be most useful to them each year. A somewhat different approach: longer-term fellowships that target grantees led by members of historically disenfranchised or marginalized groups. The Ms. Foundation Public Voices Fellowship, offered in partnership with the Op-Ed Project, provided a one-year fellowship to grantees, the majority of whom are led by women of color, as part of an effort to amplify underrepresented voices in the mainstream media. The fellowship was designed to give grantees training, mentorship, and access to platforms through which to have their perspectives heard – and valued – in influential media forums.

To this point, we have focused on capacity building for community members geared towards ensuring they have the supports and skills needed to effectively lead or co-lead advocacy and policy work. These efforts can help counteract the systemic barriers that have prevented marginalized groups from having a voice. But there is another dimension of capacity building needed to address these systemic inequities: capacity building for nonprofit and funding organizations to ensure they have the institutional structures and internal commitment required to authentically hear and value community perspectives. At a basic level, this may come in the form of training or coaching for those who are in positions of power. As a few interviewees noted, those "who typically sit in the powerful seat" may need training – or at least "candid conversations behind closed doors" – to help prepare them to engage in an authentic dialogue that recognizes and respects diverse experiences and perspectives. At a more complex level, organizations need to have internal processes and norms that allow for diverse voices to be heard and valued. We will return to these ideas around institutional capacity and commitment in later sections discussing key ingredients of meaningful engagement and opportunities to improve practices.

▶ **Community Representation among Staff and Board Members**

Several nonprofits, as well as a few funders, observed that one way in which they meaningfully connect is to make sure that their board and/or staff includes members of the community that the work is intended to benefit.

Board members may be involved in high-level decision-making or provide guidance about the organization's strategic direction. They may also provide oversight and final approval on an organization's advocacy agenda. Some nonprofits mandate that their board include a stated minimum percentage of members from the communities intended to benefit from the advocacy work.

Other organizations include individuals from the communities they seek to represent on staff. Although staff members do not always wield decision-making power within organizations, they can shape the work in meaningful ways by virtue of having a permanent position and being part of the organization's day-to-day activities. And they play a valuable role in an organization's efforts to meaningfully connect with members of the community. Hiring someone who is from a particular community brings both contextual knowledge and the ability to serve as a trusted messenger through which to link an organization with that community. As one advocate noted:

> *Cultural competency is really important. When we have people working directly with a particular community, we always try to hire organizers from that community. Again, it's a very basic thing, but who's the trusted messenger? It's going to be someone who is closer to that community, understands the complications and values of the unique community.*

For its youth-engaged advocacy initiatives, the Vancouver Foundation hired program managers who not only had community engagement skills but who also had personal experience with the focal issues: namely, they were immigrants, refugees, or had lived experience in the foster care system. This lived experience allowed the program managers to more meaningfully connect with the youth members of the advisory groups, while also informing other components of the advocacy initiatives.

Another example that centers on hiring community members is the Promotora (or Promotor) Model, an approach adapted from health and social service provision contexts. Promotoras are skilled and respected community members or leaders who live in the communities where they work, build trusting and respectful relationships within their community, and have a desire to serve the community and improve conditions (*servicio de corazón*, or service from the heart).

Resource
A framing paper on the [Promotor Model](#), authored by Esperanza Community Housing, Latino Access Health, and Visión y Compromiso, and funded by the California Endowment.

As explained by an advocate whose organization uses the model in the context of community-based advocacy, promotoras' deep knowledge of and connections with the experiences of community members makes them uniquely situated to advance advocacy and policy change work – provided they have a meaningful seat at the table:

> *I've seen the model used around the country. In some instances it's done really well. In other instances, it is more top-down – like we're going to hire folks from the community, we get it, it's helpful, they are going to be a bridge to the patients, <u>but</u> they are not necessarily given power or leadership or listened to. It's more like: you go out and educate your community, and you translate this brochure, and help your community to be smarter about this stuff… That is not how we envision or use the model… If you*

really, really want to see change, and long-term systemic change, you have to build a program that is actually listening to the expertise of promotoras when they're within your walls. If you do, you will learn from them all the systemic and policy barriers that are keeping folks disconnected, unhealthy, not accessing needed services… Promotoras have to have real power, leadership, and advocacy tools, and then leaders have to listen – that's the part that gets left behind the most.

This particular advocacy organization seeks to make those connections between Promotoras and leaders, first by training Promotoras to strengthen their leadership and advocacy skills and their understanding of the systems they seek to influence, and then by connecting them with local agencies and other partners so they can be heard and can influence policy conversations. In making these connections, the organization looks for partners "who are humble" – that is, partners who believe "policy is better when community is at the table" and who recognize the limits of their own knowledge. Due to this advocacy organization's own resource constraints, it pulls out when it realizes that a potential partner isn't ready to learn from community members. As discussed in subsequent sections below, growing this kind of "capacity to be humble" is a key challenge for both nonprofits and funders.

Why Relationships Matter

Although relationship building is often part and parcel of the process of listening, co-creating, and sharing decision-making power, it plays a distinctive role in how respondents talk about what it means to meaningfully connect. It is a building block, not just for engaging community members but for achieving sustainable change. As one advocate put it: "It's about building relationships with people who are fighting for their own place."

Nonprofits underscore the value of their staff interacting with individual community members, and coming to understand their unique perspectives. This helps staff "figure out how to participate and how you can really understand how to work with that community over time." Another advocate emphasized that it is important to "see who they are versus whatever narrative is being put out about the community."

Getting to where they live, how they live, what they are interested in, why did they become involved, what was their trajectory. For me, it's being able to connect and know that about them, but also to connect in terms of their strengths. Who were they before they came to the US if they were an immigrant? What were their dreams, their goals? Did they want to be doctors? Are they still pursuing that? Really getting to know them.

A funder made a similar point about the relationships he seeks to establish with grassroots groups, observing the importance of seeing grantees "as whole people" – and likewise, for foundation staff to "show up as whole people."

We *spend as much time as we can in communities with our grantees, not just seeing where they work and where they live, but seeing them as whole people – seeing what they do in addition to their work. I think it's also important to us that we show up as whole people… Obviously the power dynamic inherent in philanthropy is always going to be there, but we really do try to cultivate the kinds of relationships with grantees that for other grant-makers might sound like an inappropriate nightmare. For us, it's a good sign when one of our grantee calls me at 11 pm to say: you know what, this process isn't feeling good in terms of whether things have been transparent, or in terms of what decisions have been made. It obviously doesn't feel great to have a grantee tell me something is not going well. But it does feel good that they actually think it will make a difference to let me know that. And so that is another way we have emphasized these relationships: the attitude that designing the right structures*

and processes and strategies – they are only as good as our willingness to throw them out if they're not doing right by the relationships that we're trying to be accountable to.

This comment speaks to a key reason why building relationships is so important: it creates opportunities to have meaningful, honest conversations that strengthen the quality and impact of the work. We explore this further in the following section on promising practices.

What are ingredients of meaningful engagement? What are promising practices?

No single approach or model will be right for all organizations engaged in advocacy and policy work. But respondents provided some key ideas about what is needed in order for engagement to be meaningful and authentic. It's not just about which approach to connecting is used; it's about *how* it is used, *why* it is used, and *who* is included.

Having the Capacity to Connect in Meaningful Ways

Many respondents emphasized the organizational capacities needed to meaningfully connect with communities. Most particularly, they noted the importance of language and cultural skills, facilitation expertise, and institutional processes that allow an organization to respond to what it learns through listening to communities.

▶ **A Diverse Staff with Language and Cultural Skills**

Advocates need to be able to speak the language of community members and be able to relate to people coming from different cultural backgrounds. As one interviewee observed, this can be essential for reaching groups that typically are overlooked or hard to reach:

> *We work with teams of phone bankers who are trilingual. So they have the capacity to speak to people who answer the phone in Cantonese, Mandarin, or English. We've also run other targeted (by language) outreach programs. One of the reasons that that set of voters is willing to answer our calls over and over again is because we're one of the few organizations that has ever outreached to them in their language. They are usually ignored by other bigger organizations on a whole range of issues. They are grateful that someone cares about them and their opinion and the power they bring as voters. To have an organization actually care enough about them to communicate in their language -- they respond a lot better to that than your average cold call phone bank.*

Another interviewee, who leads a national legal advocacy organization, underscored that nonprofits need to value the specific skills that are required to relate to community members and build relationships with them. It's not enough to have diverse staff members; organizations need to recognize that building relationships with communities is a different kind of work and requires a different set of competencies:

> *We think about our competencies differently than we used to. We used to think about functional lawyer skills or communicator skills or lobbyist skills – and those remain critical. But included in that functional skillset is: what is your cultural competency? Can you work with people who have different backgrounds than you? Can you have judgment about how to navigate a difficult political situation? When have you worked across difference, or within conflict between different people? These kinds of skills become*

what you're looking for in the first instance. And you find the people whose strength is getting out in the field and mixing it up. And then you value it. If someone's performance is rated on how many briefs or oral arguments they did or cases they won or filed, all of the incentives are to file well-written briefs that proceed on an early timeline and win good cases. I'm not suggesting we're abandoning that. But if you want somebody to be at someone's kitchen table at 7 pm, and be talking to them on the weekends, you have to recognize that case is not going to be filed for 6 months or a year, if ever. That you may be having twist and turns along the way doing some work you didn't think you were going to do. That you'll be there for the long haul. And that you're going to call out and celebrate that work. You're going to elevate people who understand how to do it well, and think very deliberately about how they can train up other people to do it with them. It's a different way of working, and you need to teach it, celebrate it, and resource it.

▶ **Expertise in Facilitating Conversations and Working Alongside Community Members**

Several interviewees observed that it takes specific expertise to engage in meaningful dialogue with community members – and that nonprofits and funders often lack this expertise among their own staff. Engaging consultants who have relevant facilitation skills can help ensure that efforts to listen to or work alongside community members are done well. As one funder noted, it also provides an opportunity for staff to observe and learn these skills, boosting the organization's internal capacity to strengthen community connections in the future:

If you have a bunch of staff who are not really experts in facilitating dialogue or going out and having honest conversations with the community about issues the foundation is working on, then you probably want to do some internal work before doing that. I find that community engagement is "sexy" right now. You have to consult with community before you do XYZ. There's a huge scale of how well people do that. It needs to be done well, and that may mean either increasing the capacity of the foundation's own staff or working with consultants who are expert in doing that kind of work. We engaged a lot of consultants throughout this process to help with various pieces of it. But through that, the foundation staff were also able to develop their own skills for doing that kind of work... It's a real skill, being able to do this kind of work alongside people in the community. And being able to confidently walk that line between what you're hearing in the community and how the foundation can make changes within its own practice to better support community.

Another interviewee noted that funders in particular need an external facilitator given the power dynamics that are typically inherent in their relationship with communities:

Funders can't facilitate on their own. You need someone external, someone who can push back, ask questions, tell the funder: "you know what, that was a problem." You need an external person to play that role. Someone who is not self-interested. It depends on what you're doing, but maybe you need facilitators for certain pieces – people who know how to work through the race issues, the power issues.

▶ **Responsive Institutional Processes and Structures**

Once an organization has listened to community members – what then? How do community perspectives inform the work? How does the organization respond? The answer to these questions relies in part on whether an organization's institutional processes and structures *allow* it to effectively act on what it learns from community members. For example, one interviewee at a large advocacy organization described how lack of integration across the organization meant that one team's deep relationships with community groups

were not brought to bear on another team's work drafting a piece of legislation that affected those communities.

Another example: if a funder is locked into specific practices around granting cycles or the kinds of support it provides, it can be difficult for it to shift in ways that are responsive to community perspectives. As one funder commented:

> *You need to assess: how willing are we as an organization to make changes to what we're doing based on what we learn from communities? Are we willing to change our granting cycles? Are we willing to offer other kinds of support? Some of that can't always be anticipated. But if you're the kind of organization that's like: we have two granting cycles a year, they look like this, that's how it's always been, that's how it will always be – then you're not going to be able to be responsive to community. Do you want to put yourself in the position of getting input from the community that then you can't actually use because you have no ability to change your own internal practice?*

Other interviewees made related observations about funder practices, noting that an insistence on pre-determined outcomes and timeframes can undermine the very purpose of listening to communities. As one nonprofit commented:

> *Often funders have a desired outcome that they want to see. When we're working with communities, we don't start with the desired outcome in mind. We start with the process of engagement and discovery about the change that's needed. Funders are often uncomfortable with funding a process without pre-determined outcomes.*

A consultant who works closely with funders and nonprofits made a similar point:

> *You have to be able to shift your programming and your funding. You cannot be like: ok, the logic model says you need to have this done by 12 months from now or we won't see this year as successful. There has to be an ability to shift based on what you're learning and hearing. Otherwise, what's the point?*

A number of frameworks help identify different levels of community engagement, including those listed in the **Resource** box to the right. These can be helpful to organizations as they consider what level of engagement is appropriate for them.

Resource: Frameworks Defining Levels of Community Engagement

▶ Building Movement Project's [client voice and engagement continuum](#).
▶ Roger Hart's [ladder of participation.](#)
▶ Three models of participation are outlined in the [Appendix](#) of The Foundation Center's report on participatory grantmaking.
▶ Foundation Consortium's [framework for inclusive governance](#), arrayed along a continuum from exclusive to inclusive.

"Hearts and Minds": Committing to Meaningful Engagement

Commitment refers to an organization's genuine interest in understanding, valuing, learning from, and acting on community perspectives. That is, assuming that an organization has the capacity to meaningfully engage, are its staff and leadership sincerely invested in learning from and working with communities?

A foundational part of this commitment: valuing the unique knowledge and wisdom that comes with "lived experience" – that is, first-hand experience with the problems, contexts, or realities a policy or advocacy effort aims to address. As one nonprofit interviewee observed:

If you don't have that belief and humility that people who are giving you feedback are experts – they have their own expertise – and you're not aware of the race, culture, gender, and class differences that play out, I think the process won't be successful in the long run. Changing hearts and minds is one of the biggest things we were challenged with when we thought about what it takes to have meaningful and authentic engagement with marginalized communities.

This perspective on expertise was echoed in a funder's explanation of the mindset she brings to her relationships with grantee organizations and the communities they represent:

I think it is more of our mindset – how we conduct ourselves when we're being a grant-maker. It's the mindset in terms of who we consider having the expertise and experience – it's not us, it's those most impacted by the barriers, the kinds of oppressions that are being challenged right now. So we look at ourselves as: how can we support the elevation of that expertise for our grantees and their experiences? Because our grantees, who are mostly led by women of color, are connected to grassroots, they are often the ones facilitating roundtables with women who have been impacted by domestic violence, police violence, barriers when they seek reproductive health care, policy barriers that are everyday new and coming up… It's about how we conduct ourselves in the relationship with the grantee, how we make time for the relationships we have, and how we practice deep and active listening with that mindset of valuing their expertise and experience.

This commitment to actively listening to those with experiential expertise is not just seen as a good in and of itself. It is understood as a core way to strengthen the impact of advocacy and policy work. As one consultant who works closely with funders emphasized:

It's really important for funders to recognize that there's an impact lens here. It's not just for the sake of "we should have a more diverse set of grantees." But rather: most of the time, the issues we're working on disproportionately affect people of color, and you're not getting those ideas and working with the people who are most proximate to those issues and challenges – and who probably have the best ideas as to how to solve them. So there's a real impact lens for why it's important to increase the diversity of organizations who receive funding. You have to come from that real place of: this will make our work better and stronger.

Organizations need to have honest conversations about why they want to engage with communities in particular ways and whether they have the internal buy-in needed to listen and respond in meaningful ways. The commitment cannot just reside with a few staff members who deeply value the work; it needs to extend throughout the organization, including the leadership and board. As one funder observed, "If your board is not comfortable, that's a good indicator you have more internal work to do."

Relationships: Investing Time, Building Trust

As discussed earlier, relationships based on trust, respect, and mutual understanding represent an important theme in respondents' perspectives about what it means to meaningfully connect – and as important, what it takes to achieve sustained, long-term change. Funders and nonprofits can build strong relationships with community members and/or with other organizations working closely with communities by demonstrating that they understand, value, and are responsive to community perspectives.

One interviewee described how his organization worked in Wyoming communities for 10 years, building trust and friendships with ranchers and farmers by working on infrastructure projects that served both

conservation and landowners' interests. They backed off working on a controversial law on water leasing, instead focusing on building relationships. When the government introduced a pilot program for water leasing, the organization was able to leverage those relationships, ultimately resulting in landowners supporting – and in some cases even advocating on behalf of – the program. "The bottom line," this interviewee concluded, "is that success came out of the patience we had and our ability to not always go to the first fire-burner issue, but to just take a step back and see how we can work with these people and meld [our] issues with their operations."

Several respondents observed that **distrust**, and even fear, represent a strong barrier to building relationships with communities. In some cases, distrust stems from a history of negative experiences with nonprofits who have engaged with communities in disrespectful ways:

> *Building real trust and relationships so that the groups we seek to benefit realize that our agenda is formed by their agenda. Too many grassroots groups and individuals have had bad experiences working with non-profits who appear to be in it to perpetuate their own identity rather than to fulfill a broader mission. So trust, transparency, and inclusivity is critical from the start of our work, not in the midst of our work.*

> *The poor history of white-led enviro groups using/disrespecting/harming people of color-led environmental justice groups makes it harder to build and earn trust.*

In other cases, contextual factors undermine community members' willingness to engage with advocates. A key example of this: the fears that immigrants feel in the current political environment. As one advocate explained:

> *Particularly in places with a lot of agriculture where ICE shows up – everyone shuts down. Parents are worried about sending their kids to schools, or wonder whether the school will rat them out – to use their words. So Latino, Latina, LatinX communities are less accessible and they're very scared. It helps that we have staff who look like them and speak the language, but they can't keep them from being deported.*

How is trust built? Respondents emphasize that part of it is about **showing up with respect and with humility**. As one funder put it, you need to build trust over time in order to be "invited into the kitchen":

> *Actions speak much more loudly than words. We have to show up and show up and show up. And not just showing up for regularly scheduled meetings. It's going to community events, being out in community. It's also how we show up – showing up with cultural humility, showing up to listen and learn… We have really hard conversations with executives and boards and leadership about the state of their organization or their needs. But it takes a while to get there, to really be invited into the kitchen… It just takes time to build that relationship. In philanthropy, there's a lot of history where it's the flavor of the month and then you're on to the next thing. There's not necessarily follow-through; it's top-down, it's "we're going to hold you accountable."*

A recent report commissioned by the Hewlett Foundation yielded similar insights into promising practices for relationship building: come into communities with humility; don't assume you have all the solutions; and be ready and able to work with and respond to community perspectives in defining the problem, identifying threats and opportunities, and developing solutions. Moreover, the report noted that relationship building is necessary to achieve sustainable conservation gains – and flagged that current efforts "fail to embody these best practices":

While the fundamentals of this approach may seem like common sense, it warrants repeating that interviewees resoundingly believe that conservation efforts in the West may not endure because they fail to embody these best practices or establish the baseline conditions for successful collaborative, community-driven conservation. To build long-term support and achieve sustainable conservation gains, advocates should invest in building long-term, trusted relationships within rural communities that are based on a deep respect for the knowledge, wisdom, values, and culture that reside in those communities.

> **Resource**
>
> [Rural Perspectives on Western Conservation](): Commissioned by the Hewlett Foundation, this report includes relevant research findings on effective relationship building with communities in the context of conservation work.

This emphasis on long-term relationships speaks to the **time investment** required to build trusting relationships and to engage thoughtfully and iteratively with local communities. As one advocate put it: it's about "working at the speed of trust." This is not necessarily as "efficient" or "easy"; but it is more effective. As one advocate noted: "It would be easier to simply take state and national messaging and priorities, and push them down to the local level. We believe locals know more about what's best for them than those in Lansing (MI) or Washington DC. We need to listen to them and let them shape our work."

Another advocate contrasted the difference in "transactional burden" and time investment when using a model that relies on partnering with known groups who are well-resourced and "speak the same language" versus a model that involves going into communities to discover who the community leaders are and what they think the problems and solutions are.

What we're talking about is going from a model where you have trusted, well-resourced colleagues that you know over many years, who have the bandwidth to work with you, and you have institutional understandings and speak the same language. The transactional burden of working in that way… is nothing compared to the investment of time [for community-based work]. If I want to do some work in Missouri and I know the Sierra Club cares about the issue and has a chapter there, then we're off to the races… It's a role that Green Latinos plays or NAACP or any group that has a national overlay representing local constituents. And what environmental justice groups would say is: those groups don't actually have a ground game, they aren't actually the community groups. So while they play an important role, they get conflated in the minds of mainstream greens as being "the environmental justice voice." And they aren't. There is no such thing. There are a million different groups. …The reality on the ground is that these groups are small, they are rarely staffed by dedicated FTEs, they are scrambling for money, and they're struggling just to get any seat at the table where a conversation is happening. Even if you want to find out who they are, you may not know them – and the history you have to overcome once you do meet is significant. So the barriers to finding each other, trusting each other, and working with each other are big. And I think that's why, despite good intentions and understanding that local work and environmental justice work is critical and needs to be better resourced, I think this is why it isn't yet. It takes an understanding that it's gotta be an investment of time and relationship building, place by place.

Lastly, **transparency** is a key ingredient for building trust. Organizations need to set clear expectations upfront about what role community voices will play in the advocacy or policy work. For example, if the objective is to gather the perspectives of different stakeholder groups regarding priority issues, an organization should describe to those stakeholders: whose input is being sought, how it will be used, and whether there will be additional points at which the organization will reach back out to stakeholders. Or if

community members are going to play more substantive roles developing or implementing the work, the organization should clearly define the specific responsibilities and/or decisions that community members will – or will not – be undertaking. As one advocate noted:

> *Policy work is time-consuming and there are points when decisions need to be made very quickly. It is important to discuss with community members in advance that there are times when response times are extremely short and that we cannot always wait to have a full discussion. It is good to have a system set up in advance for this, especially if the decisions on last-minute policy changes are difficult.*

Representativeness: "Who You Choose Matters"

In many cases, it is not possible to connect with *all* members of a community – at least not at an equal level of depth. So the people with whom an organization connects need to reflect the diversity of the community. "It's really easy to celebritize an N of one," an advocate observed. "We celebritize that one experience to the point where we can create a one-size-fits-all notion around what the solutions are."

But as one interviewee queried: **who counts as "the community"?** Who authentically represents community perspectives? Another interviewee noted that, when her organization approaches a community, it isn't always clear who the community leaders are, nor is there always local agreement on this.

One way advocates and funders try to better understand the diversity of perspectives in a community: work closely with organizations or local leaders who have deep connections to the groups whom the advocacy or policy work is intended to benefit. For example, advocates reported that they partner with direct service providers who have built trusting relationships with community members. And funders make grants to organizations that have deep community connections – or are led by individuals with direct personal experience with the problem or issue that the advocacy work aims to address. As one funder explained:

> *If you look at our LGBT grantee list, every single one is community led. And most groups in our immigration portfolio – their executive directors are either immigrants themselves or children of immigrants. And they have a base. We look for this… as part of our due diligence, we look at the places where your community members, your paid membership base, are in the governance structure. And how do their priorities float up in your organization as shared priorities, as you set your advocacy agenda for the year. Therein lies the difference… We really look to partner with groups that have this deep community connection. So we don't need to leapfrog them and start having our own community meetings. It's built into their structure.*

Another way to diversify the voices that an organization listens to: explicitly look beyond "the usual suspects" – the voices already within its circle. For example, one interviewee described the process that she and her foundation colleagues used to identify people who were "on the outside of our circle":

> *We didn't really know where to start. There were lots of people we could hear from. In addition to students and teachers, there are many influencers on those folks – employers, academics, parents, and others we thought we needed to hear from. So we sat down with our whole team and mapped out those different categories of folks, and had our team put up names (literally on stickies) of people they had heard of but didn't necessarily know – who were really on the outside of our circle. We shouldn't have any stickies at the core of our circle; we know who is at the core of the circle – they are the ones we interact with all the time.*

Accessibility: Making It Feasible for Communities to Participate in Advocacy and Policy Work

Accessibility is a recurring theme in responses about how to meaningfully connect. Respondents emphasized the forethought and care needed to ensure that community members are able to effectively participate. This includes logistical considerations like providing child care, a travel stipend, or other forms of compensation, as well as thoughtful planning around what times and locations make sense for community members. As one advocate noted, "We try to be mindful that for a lot of folks, community participation is a luxury." Ensuring accessibility might also involve having interpreters for different languages, including American Sign Language.

Resource
[Action for Inclusion: A Resource Kit for Community Conversations](#). A resource kit to help organizations engage with the diversity of communities in meaningful ways. Includes a thoughtful discussion of different dimensions of diversity, and a detailed set of tips for organizing inclusive and accessible meetings or events with community members.

Harkening back to earlier points around the importance of inclusivity and respect, one interviewee commented that these kinds of preparations "acknowledge the situations people are in, and show the sincere commitment to ensure the people whose voices you say you want to hear can actually attend and participate." Another concurred, emphasizing that "you can't just at the last minute say, oh we need some input. This has to be intentionally built in from the beginning and heavily invested in for it to feel authentic, and not a check-the-box kind of thing."

Creating Value for the Community

Organizations' efforts to connect can feel one-sided, particularly in cases where input is gathered as a relatively isolated or one-off exercise. Communities are being asked to provide their perspectives, stories, input, and expertise in order to inform or strengthen advocacy or policy work. And oftentimes funders ask their grantees to engage in reporting practices – such as grant reports or site visits – that take considerable time away from their work. A good practice is to think about how efforts to connect or listen might be structured so that community members – or overstretched grantees – might also get something of value. As one funder put it: "In anything we do that's about listening or getting information, we don't want to be a siphon. We want that to be able to help the group."

For funders, this might mean approaching reporting practices somewhat differently. For example, the participatory grantmaking approach discussed earlier includes a focus on reporting mechanisms that are more effective for supporting grantee learning and capacity building. One example of this: for a final report to the California Endowment and the Tides Foundation, grantees were asked to create something that would help advance their work, such as a brochure or a presentation that could be given to local partners or other funders. The product had to include what had been achieved with the grant, but it was oriented towards yielding something of value to the grantee, as opposed to being solely designed to ensure accountability to the funder.

Funders might also consider how site visits or learning tours might be opportunities to raise grantees' visibility or help them make important connections that will advance their work. For example, one funder organized listening tours "as a way to connect with our grantees, to see their physical spaces – the landscapes and cityscapes – and to listen to what they have to say." But in addition, when grantees were willing, the funder recorded them explaining their work and the context in which they are situated, and then produced short videos to give back to grantees. "Now it's a video they can share with other people, other

funders, or community members about why they exist. So we got to listen and learn from them, and we also got to give back." Participants are also paid for the time taken away from their work.

A Washington, DC-based advocate described another example of this, where the funder helped her organization "get in doors" that would otherwise have been closed:

> *It's not just about the funder getting to see what we're doing on the ground. We can actually leverage the funder's presence for advocacy. For example, when our previous program officer came to DC, we did meetings on the Hill, we did a meeting with the White House, we did a meeting at the Department of Education. I can get in doors with someone from that Foundation that I can't get in on my own… So funders should think about not only seeing the communities, but how their voice can enhance the work that's happening on the ground.*

Creating value for communities can also come in the form of the capacity-building work described above. At the same time as a nonprofit or funder is listening to and learning from communities in ways that inform its work, it can also be engaging in activities that build those communities' capacity to have a voice in advocacy and policy contexts.

Having a Plan for Navigating Disagreement

It can be challenging when organization staff disagree with a community on what to do, or when communities want something that is outside the scope or wheelhouse of the organization. As one advocate noted:

> *Another important question we have to figure out: how do we weigh differences of opinions between different types of partners? We work in a lot of different communities, and they might not all agree on all the same things. So we are trying to think through not only how do we set up these processes to elevate the voices of our community partners, but what do we do when our community partners don't agree with each other?*

It is important for organizations to have a clear idea of how they intend to handle situations where disagreements arise. For organizations that support community-led efforts or community organizing – be they nonprofits or funders – it may be necessary to "do a certain amount of backing off" in situations where community priorities differ from that of the supporting organization.

> *It's hard for foundations to accept this: that a foundation has to do a certain amount of backing off if they want to support community organizing. We could come in with our PowerPoint on student centered learning, but sometimes they would all discuss it and say, yeah, but we really want to advocate for a new football field. We learned that if we help these organizations with authenticity and fidelity and give them the resources they need, and remain married to principles of authentic organizing, then eventually we will be OK. We learned that if they really want that football field, it's because it has some bigger significance that makes it really important to that community. We have to be ok with that. There was a risk in taking that approach, for sure. But we learned if we would allow the district and these community organizations to be left to their own devices, that they would come up with student centered learning on their own. They might not call it that; and it would not be exactly what we thought it would look like. But it genuinely worked out.*

A community organizer working on neighborhood campaigns voiced a similar perspective, noting: "There have been moments when the community says, whether you're in or not, we're still going to continue. And

our response is: if the community needs to take a certain action, that's what the community needs to do." Dialogue between staff organizers and community members can help ease any tensions around what direction to take campaigns, but staff need to understand that "the community really owns it and sometimes you kind of have to step back."

This question of how to handle disagreements relates back to earlier points around transparency. Differences of opinion will inevitably arise. It is important to anticipate this reality and be clear about how disagreements will be resolved – what processes need to be followed, who needs to be heard and how. And in cases where consensus cannot be reached, it should be clear how a decision ultimately will be made.

Addressing Power Dynamics, Shifting Power

Power dynamics are embedded in relationships between funders and grantees, between funders and communities, between nonprofit staff and community members, among nonprofits, and within communities. These power dynamics – rooted in differences of race, ethnicity, culture, gender, and class – need to be acknowledged and addressed as part of any effort to meaningfully and authentically connect with communities, particularly those who have been historically and/or are currently marginalized.

On the most basic level, funders need to be extremely aware of the power dynamic that shapes how others interact with them. As one funder quipped, "I sometimes tell our staff that if someone says, *That's a great idea, but I have a little suggestion* – you should take that as violent opposition to your idea as a funder." Another observed, "It might sound really nice and lovely to sit down with some grantees… But I think people sometimes have unrealistic expectations about what people can and can't say, and they don't acknowledge that there's a power dynamic."

The power differential between funders and nonprofits can manifest in the form of a funder dictating – or at least expecting to heavily influence – its grantee's strategy. This can create problems when the funder's preferences do not match what nonprofits are hearing from communities:

> *Say a funder like [redacted] comes out with a very strong proposal for habitat protection. They are a big player, science driven, and not necessarily doing community outreach. And our local chapters say: well, actually we want to support what we think is a more balanced proposal. And then the funder steps in and says, what do you mean you don't support our proposal? We've had to navigate that in the past. In a few cases, we maybe lost funder support. In other cases, we have convinced them that even though it may seem like we are not able to be as strong on this issue, because we are community-based it actually makes our voice more impactful than just a group that signs on to some larger proposal but that doesn't really have any community relationships to support it.*

Some funders have sought to address this power imbalance through the co-creation and co-decision-making processes described earlier. Other funders have used general operating grants and more flexible reporting practices to try to disrupt typical power dynamics with grantees. For example, the Trans Justice Funding Project provides "no strings attached" grants; grantees are given unrestricted funds and are not required to submit a final report. This helps shift the power dynamic between grantees and funders, reflecting the organization's view that funders reinforce power imbalances and the status quo by "regulating" grantees. Giving money without strings shifts the paradigm from thinking of the money as belonging to the funder or its donors, to thinking of it as "belonging to the movement itself." Similarly, the Chorus Foundation requires no annual reporting on its unrestricted, long-term support.

Power dynamics also arise in interactions between nonprofit staff and community members. For example, a community organizer noted the challenge of "getting our staff to feel comfortable voicing their opinion while also being mindful of the power dynamic going on here."

> *We have to be intentional because of the more seasoned organizers are like: we're ready to go. And it's like: well, you have to move with the group. Have you guys had a conversation in dialogue with the community about what is the issue, what's the root behind it? Have you done a community visioning session about what solutions you want to see, and what would it look like to have success? Have you done a planning session with them around how long is it going to take for something like this to be done and accomplished?*

Nonprofits that lack deep ties to a community also need to be mindful of how a position of privilege can create blind spots:

> *We also have to be mindful that we are not of those communities so how to handle that and not feel we are taking advantage of people's experience and expertise with our privilege. How not to have blind spots and to be careful to know that we do, even if we may not totally know what they are?*

**Resources:
Addressing Power Dynamics**

- ▶ A tool from the National Community Development Institute describing different sources of power and ways to reduce power differences.
- ▶ An organizational cultural competency assessment in *The Handbook of Community Practice*, 2nd edition. It includes questions around power dynamics and who has decision-making power.

As discussed earlier, ensuring that communities are represented within an organization's staff and governance structures represents a way to shift power. But this must be more than simply a seat on an advisory group; the invitation needs to include actual decision-making authority. This applies to nonprofits as well as funders. As one funder observed:

> *One of the themes I see in philanthropy is acknowledgment of the power dynamic and talk about sharing power. And in practice a lot of it is advisory committees – but not actually sharing the power. We actually have community partners sitting on our board, our decision-making committees, our grantmaking committees… [As] part of our commitment to disrupting power norms in philanthropy and also improving in terms of diversity of life experience, socioeconomic status, race, etc. over the last couple years, we have evolved in terms of who actually has power to make decisions in our organization. It's not: oh, thank you, three people from the community, we're going to seek your advice, but not pay you for it and we'll still decide whether we take your advice or not. They are sitting at the table with a voice in our decision-making around where we're investing and how we're partnering.*

What are key challenges? Where are opportunities to strengthen practices?

Bringing More Diverse Voices to the Table

There is widespread consensus that more diverse voices – and in particular, more voices from communities of color and other marginalized groups – need to be at the table in policy advocacy. As one funder put it:

I've been saying we need a hashtag: #policysowhite. It's amazing to me the number of rooms I walk into where it is all white people sitting around the table making the rules for the system that serves 50% kids and communities of color – and that has largely screwed them over for the past many years. And we're all pontificating about what we should do. And I put myself in that too – I'm a white lady.

▶ Funders

Some funders explicitly recognize that they need to strengthen their efforts to bring the voices of community-based organizations and organizations led by people of color to the table – though they may have some uncertainty about how to do so. As one foundation interviewee noted, a lack of grantee partners based in affected neighborhoods is "something we know we need and want to correct. But until we find that type of grantee, we don't quite know how to get that neighborhood's perspective." Another foundation interviewee noted her focus on questions of how to engage authentically and avoid tokenism:

We are actively undertaking some efforts and funding some groups to increase the capacity of communities of color to be part of those advocacy tables. But that's been one of the hardest things: how to do that in a way that is authentic and as a partner with them, rather than as a "oh, wow, we need a token person who doesn't look like that." As an organization, we don't always have the best record there. Trying to be more mindful about how we do that more meaningfully has been something I think about a lot and something I work on as I do my grantmaking: how do we be authentic in these conversations, and bring people to a whole lot of different tables, as partner or direct grantee?

As one interviewee noted, an important starting point for diversifying grantmaking portfolios is to track data on which organizations funds are going to – and the size of the grants. This enables funders "to understand that you need to make a change." From there, "look at what the barriers are. Is it about extending your sourcing strategy? Do your criteria have implicit bias?" This can help funders identify how to address disparities in the amount of funding going to organizations led by white people versus people of color. Another interviewee made a related suggestion around exploring different ways of investing in organizations:

Research indicates that organizations led by people of color have less capacity and deal with worse budget deficits. It may take more support through leadership programs. There may be different ways you have to invest. Not because people aren't as good, but because they may not have been afforded the networks and opportunities to be in this world where they are getting the grants that others get.

As a complement to such efforts to diversity grantees, funders need to do due diligence on the extent to which organizations are actually "on the ground" or "rooted" in communities. As noted earlier, one way to do this is to examine whether and how members of the community are incorporated into the governance of the organization, and how community priorities "float up" in the organization to inform its agenda. This applies to nonprofit grant applicants as well as community foundations who may serve as a national foundation's local partner. One interviewee observed that community foundations "have their own dynamic of who they are not funding. And the access of organizations to them is bound up in that... They are not staffed to go out and find grassroots organizations." Particularly in cases where a funder seeks to build the capacity of small grassroots groups, the choice of intermediary can have important implications for which groups are reached.

Another suggestion is to evaluate grant proposals not just based on face value – how polished is it, whether it includes all the right buzz words – but through the lens of understanding what the group is actually doing and how it reflects a particular community's experience. The Trans Justice Funding Project, for example, highlights this as part of what it means by "doing philanthropy differently":

Not everyone uses the same political language to describe their work – or to describe themselves. A lot of things factor into the way a grant application reads, including: where the writer is from, their communities, their class and education background, and their experiences with intersecting oppressions. It's easy to get excited about applications that are super well-written and use familiar language. But we don't want our decisions to be based on who is the best writer or who has access to the most current political thinking. We try to look past writing and vocabulary to make decisions on what the group is actually doing.

▶ Nonprofits

Some nonprofits noted challenges they face in connecting with those they intend to benefit – particularly communities of color and other marginalized groups. In some cases, the challenges arise from the difficult circumstances that these communities face on a day-to-day basis. As one advocate at a youth-focused organization commented: "it's hard to ask a homeless young person to take time/use their slim resources to be constant participants in our work."

In other cases, advocates acknowledge that they need to strengthen their efforts to incorporate diverse voices. For example, interviewees at two membership-based organizations noted that they have historically lacked formal recruitment strategies targeting voices that are missing from their membership. Another individual, representing a policy research organization, observed shortcomings in their efforts to connect with low-income communities and communities of color:

To this point, we have generally worked most directly with grassroots folks who, for the most part, do not (in present day) fall into the category of people whose lives we are actively working to improve. We have had limited closer interactions with grassroots folks who either come from the communities we aim to serve or are very closely in step with through their organizing work… We have a ways to go in increasing our connection to low-income and communities of color… our limited interaction (which we do plan to increase) has not created a robust feedback loop that informs our organization's policy priorities. That is where we are aiming to go though… We are a relatively small staff and do have a fair bit of research and analyst work we have charged ourselves with, but some analysts at our organization manage to balance that with ongoing and effective outreach to (at least) grasstops partners. None of our analysts come from organizing backgrounds, so they have a harder time understanding the importance of connecting with real people struggling with the issues we research. There's also an element of privilege (whiteness, socioeconomic, level of formal education etc.) that creates a natural distance between our staff and the folks we work in service of.

This response speaks to two important insights. One: grassroots groups are not synonymous with marginalized or underrepresented groups. An organization may have close connections with community members, but those community members may not be the ones who are intended to benefit from a policy – or who may be most vulnerable to any negative impacts of that policy. This is partly due to the high barriers to participation for groups who experience hardship, oppression, or are otherwise marginalized. The second insight: the "distance" that separates professionals with technical or policy expertise from the community members whose lives those professionals aim to benefit. As discussed later, this distance is reflected in tensions around how different forms of expertise are valued.

Gaps in Organizations' Capacity to Meaningfully Connect

There is ample room to strengthen organizations' capacity to listen and connect in meaningful ways. One straightforward example is language capacity: a number of nonprofits noted they don't have staff who speak the native languages of communities they aim to benefit.

But listening *well* requires more than a shared language. It requires "intentionality and expertise." As one advocate put it: "Overall, on a scale of 1 to 10, the field of really listening to community is at a 4. There's a ways to go. People think they are doing it well, but they're probably not." As an example, she described the discrepancy between what students and parents were trying to say versus what advocate partners thought they heard:

> A couple of our advocate partners came to talk to our student and parent groups about what was not working three years after the Local Control Funding Formula was passed. They took away that budget transparency is a problem, so we'll advocate for a new document that is more transparent. And yes, that was a part of it, but it was only 20% of what people were really saying. When you unpeel the layers a little bit more, it wasn't the budget documents; there was something much more deeply underlying that around the authenticity of the decision-making process itself. You can have beautiful documents that are really clearly laid out, but if there is not trust or authentic engagement between the school and the community, it still feels like a frustrating and vague process. So that is what those participants in those conversations were saying, but the advocates didn't quite hear that, or didn't quite spend the time or have the right process to unpack it.

Another advocate commented that "a lot of times constituents get involved in a very token-y way. And then that often doesn't sustain. The parents don't stay interested, or something blows up or creates problems."

Some organizations recognize that they need help to improve their listening efforts. For example, a consultant who works with funders and nonprofits observed "a strand of foundations that are becoming awakened… and they're actually seeking to learn how to facilitate these conversations and have these types of authentic and iterative conversations – and they know that they need assistance in getting to an optimal place." Some nonprofits are likewise reaching out to those with experience deeply integrating community members into their work. For example, one interviewee – whose nonprofit has integrated community members into its governance structure as well as in the development and management of its advocacy work – noted that her organization has helped other advocates deepen their community engagement practices, serving as a trainer, consultant, or even a full partner helping them set up internal structures and train staff.

Recognizing What It Costs to Meaningfully Connect

Beyond the skill sets and capacities necessary to engage meaningfully with communities, a major challenge is funding. One recurring observation is that it takes more resources – more funding – to connect with communities in meaningful and sustainable ways. Part of this has to do with the practical costs of enabling communities to participate – for example, covering the cost of travel, food, child care, etc. But even more fundamentally, funding needs to reflect the time and effort it takes to build the kind of authentic relationships that meaningful community engagement – and effective advocacy – requires. As one advocate put it:

> This is long-term relationship building, and funding streams rarely match that need. These are not new flashy projects every year or two, but the hard work of building authentic relationships with partners and community leaders that are only impactful if maintained over time.

Resources are needed to staff this kind of sustained relationship building. As noted by a respondent at a national policy advocacy organization, a full-time staff person is needed to lead the organization's work with an advisory council of youth. "We want to do this work in a sustainable and long-term way," this respondent continued, "but it is difficult to secure the funds we need year after year." Another advocate at a national conservation organization observed: "you can't put people in these places for 2-5 years – it's just not enough" for achieving long-lasting solutions:

> *If you're going to work in rural communities, you need to commit to it over time. You're not going to always agree; you're not always going to get to the solutions as fast as you'd like. But when you do get there, they will be longer-lasting.*

Mirroring this higher-level outlook, an interviewee at a national legal advocacy organization urged funders to invest more heavily in advocates' efforts to build local relationships:

> *To me, the challenge for the philanthropic community is to really make a leap and trust the groups who are doing this work, give them the free reign, the time, and the level of resources. Don't fund this at the 50K level; this should be getting the same 7-8 figure bets that other crucial strategies are. If people don't really believe this is a crucial strategy and they're dabbling in it, I think that's counter-productive. Because you can't do this [local level work] on a shoe-string budget… My pitch to funders would be: if you believe this is necessary, then really fund it. You cannot overstate how hard this is. The world isn't waiting for you to build a relationship and get this all straight. Someone has to get in there and fight about it. It's not neat. We will never get to the point where we have the relationships to jump in when the crisis hits if we don't start investing in it at some point.*

This kind of investment in relationship building speaks to the length of grants – and the level of certainty that grantees can have about a funder's commitment to supporting long-term community engagement processes. As one funder pointed out, funding organizations in 1-3 year increments consistently for 10 years is different from committing to them for 10 years upfront.

Funders' Internal Policies and Norms

Funders' internal policies, practices, and norms can play an important role in undercutting efforts to connect with communities. For example, inflexible grantmaking processes can make it difficult for funders to support small grassroots organizations. As one funder noted: "We've kind of gotten around that by using some intermediary funders," but it remains a challenge to meaningfully connect with community-based organizations that have "an uber-small budget."

A number of interviewees commented on the tendency for funders to award grants to larger, typically white-led organizations as opposed to smaller grassroots organizations led by people of color. As one observed:

> *The internal policies of grant making prevented us from genuinely reaching those organizations that represent the traditionally marginalized. The grant makers at traditional institutional foundations like [redacted] that have their processes and boards of directors, just by practice tend to gravitate to organizations that are equipped to navigate the bureaucratic bullshit. Those organizations tend to be bigger, more established, older, whiter. As a result, you miss out on the real, on-the-ground, grassroots organizations.*

One reason for this bias: "like funds like" – an idea captured in the term *homophily*.

Cheryl Dorsey who runs Echoing Green mentioned this phrase: homophily. It's basically: like funds like. Oftentimes nonprofit leaders don't have the connections or relationships with funders. And if you're coming from a different community or background, sometimes you don't have a way in. So it's on you as a funder, given the power dynamics, to actively break those barriers down. And recognize where do you have blind spots? Where is what you're funding not going to get you there because you're not working closely enough with the communities you're trying to serve?

As discussed earlier, inflexible organizational structures can also make it challenging for funders to actually act on the input they receive from communities. One interviewee observed that national funders "with really strong technocratic strategies… say they want community engagement, but they don't actually have any intention of modifying what they're going to do." The problem: the way this kind of organization is structured makes it hard "to go back to the board and say we're totally changing things because these people on the ground said this will not be helpful."

This observation brings us back to the earlier discussion of an organization's commitment to authentically connecting with those intended to benefit. There needs to be buy-in organization-wide, and a culture of valuing diverse perspectives and the expertise that comes from personal experience with the problems that the work is intended to solve. Commenting on the practices of a large funder, one advocate observed:

What I don't see is a process of engagement, even listening, before deciding what the strategy should be... I think that there's not just a role but a responsibility there. We should all better understand the lived experiences of the people furthest from opportunity whom we're trying to work with – and remember that we're trying to work with them and not for.

This "responsibility" applies not just to the community members a funder listens to or the grantees it supports – but also to the individuals who work within its walls. As one funder commented, it's not enough to just hire people who have lived experience – the organization itself needs to break down the internal norms that privilege one perspective over another:

You can hire people with lived experience, but then your organization has to change to make room for them. If we hire people with lived experience, and then we're like: you need to have all the same points of view and way of seeing the world and way of moving in the world that we've developed and that we think is the one "right way" that people of privilege have built – that's just tokenism. Part of our investment in the position of Director of Diversity, Equity, and Inclusion is to continue to evolve as an organization. How do we make this a place where people with lived experience can show up and be their whole selves and bring all the skills that they have connecting across all these lines of difference.

> **Resources: Addressing Institutional Norms that Reflect White Dominant Culture**
>
> ▶ A worksheet identifying norms of white dominant culture and alternatives to those norms, including around power sharing and decision-making.
> ▶ Changework Dismantling Racism Workbook.

Tensions around Power Sharing and Expertise

Organizations are still actively wrestling with how to address power dynamics and tensions around power sharing. As noted earlier, differences in race, ethnicity, class, gender, and culture underlie power imbalances that continue to pervade the nonprofit sector and philanthropy.

One manifestation of this is considerable tension around the role of expertise in advocacy and policy work – and who is (or is not) an expert. One definition of expertise comes in the form of professionals with in-depth knowledge and experience in policy, research, and advocacy. Then there are those who bring a different kind of expertise – the kind that comes from lived experience or working "on the ground" with communities. There is tension around how to value each form of expertise.

As a number of interviewees observed, community voices are frequently relegated to roles in advocacy and policy work that under-value their expertise. An interviewee whose organization represents a network of immigrant-led organizations described how advocates "who know how to pull the levers of funding" take the lead on immigration efforts instead of approaching groups with expertise and long-time experience working on these issues.

> *This is an issue and it does push buttons for a number of our members: when there's a campaign that is apparently designed by a marketing firm in DC, and then it's like "who's with us?" You get a package and you implement the package. That pushes buttons for our members. In fact, it's why we formed this organization in the first place; they wanted to be the ones to get to say: here's what we think is important and this is why we're going to work on these issues.*

An interviewee whose organization helps build the advocacy capacity of grassroots direct service organizations observed a similar set of dynamics between these groups and policy organizations.

> *There are several dynamics. The first is the calling you on a Wednesday, saying we need someone to come down to the Capital; can you find a low-income single mom with 3 kids but not 6, who is prepped and trained and can eloquently deliver an impassioned speech. That happens all the time; and it's really destructive to everyone involved, even if it sometimes helps advance the win. Some organizations have figured out how to be prepared for that, but most haven't. And then there's the dynamic of the relationship between policy organizations and direct service organizations … We are intentionally using that to connect those two different types of groups so the people get to know each other. We started with the policy groups coming in and saying here's our policy agenda for the year, here's what's coming, here's what we're working on, is anyone interested, here's how you stay in touch. What we're working towards is: how do we sit down with them <u>while</u> they are crafting the agenda – to make sure it is more reflective.*

These examples point to challenges around sharing power – the power to define or lead an advocacy effort. As one interviewee observed:

> *We still see some group as the experts who know how to do things, and sharing that expert power is a very difficult thing to do. I don't think we have the structures or systems to do it well. So we short-cut it because we are under stress, and we don't have a lot of time, and we want to get things going.*

Tensions around power sharing are exacerbated when it becomes an "either/or" calculation about which type of expertise to prioritize in funding decisions. From the perspective of an organization that has policy and legal expertise, it can be frustrating when funders focus solely on community groups without recognizing the need to support collaboration between these groups and traditional experts:

> *I know that including increased attention to the voices of constituencies that are feeling left out is very important. But it should not mean shifting resources away from knowledge, expertise, and data that could empower those voices to be more convincing and effective. It would be a better strategy to empower those voices and connect them with people who have the level of expertise that groups like*

mine have…. We set up stakeholder groups and sent our lawyers out to explain the regulatory and policy issues and talk about access to the system. And the funder supported the community groups but cut support for us. So we lost the funding we needed to speak about and explain the system – and then we had to do that anyway for free. I don't want to sound parochial or petty, but a real strategy would combine those voices with a coherent course of action.

Power-sharing tensions are also triggered by efforts to build the capacity of community members or smaller local organizations to be at the table and to have a voice in decisions. As one interviewee observed, teaching people how to fish (i.e., to have a voice) can feel threatening to those in power. Referring to his experience with community foundations, he made this distinction: "They're helping people; we're empowering them."

It is unlikely that these tensions around expertise and power sharing can be resolved using an "either/or" lens – that is, with "either" community voices "or" traditional experts driving advocacy and policy work. Rather, organizations should look for "both/and" approaches that value multiple forms of expertise. As one consultant explained:

There are things a community member certainly is expert in in terms of her own lived experience, and what she's experienced as obstacles. She may not have as much of a purview from the outside in terms of understanding the options; she may not know, for example, that there are other options besides predatory lending and that other people are experiencing financial services in a different way than she is. So it's important to recognize individuals' expertise, but also wanting to complement that with knowledge from people who have perspective across policies and communities. Both are important.

A funder made a similar point, emphasizing the need for both kinds of experts to play a role:

You need to have a community conversation with people who give a shit and know this problem inside and out to frame and understand the problem and where the system doesn't work. That is essential, and it takes time, and it's the thing we skip most often. People with expertise with a capital "E" and a doctorate – but who have never lived in the system – are often framing the problem instead of communities… I think lived experience is absolutely fundamental for the framing of these problems. Why do these ugly patterns that none of us want to see – why do they exist? It's critical to co-design solutions too. But let's not swing the pendulum and say: communities need to frame and solve all the problems. I also think there's a role for evidence and expertise. I think it's a both/and.

This kind of "both/and" approach requires a willingness to collaborate – and recognition that multiple types of expertise are required in order to get to the right solution. Here is one advocate's humble perspective on how her organization's expertise can complement the expertise that communities bring to the table:

If we're experts at all, which is really a question, it's not that we're experts on the issue or the lived experience. We're experts on wrangling the sausage factory maybe. What we're contributing is experience with doing certain kinds of things that may be important to getting a win here, but are not the full extent of expertise required in any way, shape, or form. So what we're doing is skills sharing. In other words, we're the advocates, you're the impacted community. You know how this stuff plays out on you. We know a little bit about bending the sausage factory around. So what we're trying to share with you is techniques and strategies on how to do that part. And what you're trying to share with us is what impact it will really have on the ground and how you can get your community energized about this particular thing within the constraints of what we agree what might be possible.

Supporting Direct Service Organizations to Engage in Advocacy and Policy Work

As several interviewees observed, organizations that provide direct services often have close connections with communities and can provide valuable insights into community perspectives, experiences, and challenges. This is not a universal rule; some direct service organizations are more deeply connected with and embedded in communities than others. But due in part to their regular interactions with populations that are intended to benefit from advocacy or policy work – including very marginalized groups – direct service providers are frequently in a better position than advocates, policy organizations, or funders to deeply understand the community in which they work and to have built trusting relationships with community members. Recognizing this, some advocates partner or collaborate with direct service providers who have deep ties to local communities – both to learn about community perspectives indirectly (via the providers) and to create opportunities where community members can directly voice their perspectives to advocates or get involved in advocacy themselves.

In other cases, the same organization takes on dual functions: direct service provision *and* advocacy. Our research surfaced a few examples of larger advocacy organizations engaged in direct service or community project work. As described earlier, these organizations gain important insights from their direct service or project work with communities, which then inform advocacy and policy initiatives. A different incarnation of this dual model: very small grassroots direct service providers who are beginning to incorporate advocacy into their work as a necessary means for addressing systemic problems. Interviewees suggest that this is a growing trend – one that is promising, but requires support and nurturing.

> **Resources: Supporting Advocacy Work among Direct Service Providers**
>
> ▶ The Building Movement Project's Engage to Change initiative and free repository of tools are designed to help build the capacity of direct service organizations to engage in social justice and advocacy work and to meaningfully involve constituents in those social change efforts.
>
> ▶ Nonprofits Integrating Community Engagement (NICE) Guide: Developed by the Building Movement Project and the Alliance for Nonprofit Management, this guide aims to help service organizations think about how to engage participants in social change work. It is full of tools and resources that organizations doing a mix of direct service and advocacy might find helpful.
>
> ▶ The Alliance for Justice's Advocacy Capacity Tool is a benchmarked guide that organizations can use to self-assess their readiness to take on advocacy. The Alliance also offers numerous other free tools and resources to support nonprofits' advocacy and social change efforts.

As observed by an interviewee who is deeply involved in efforts to build the capacity of direct service organizations to engage in advocacy work: these organizations need support to take on advocacy work and to make sure that constituent engagement is authentically a part of that work. They need a clear plan, embraced by the entire organization, that articulates why advocacy is valuable, what issues are important, and how constituents will be engaged. They need to resource that plan. And they need training on how to effectively engage constituents in advocacy work.

Another interviewee, representing a funder that supports organizations doing programmatic work in communities, observed: "for a lot of organizations, policy advocacy is very new." And as her organization "steps into that role of building capacity," she emphasized the need to be responsive to the needs that nonprofits express, whether it is technical assistance, a consultant who can help develop a policy advocacy strategy, or other forms of capacity building.

While nonprofits doing direct service or programmatic work are well positioned to do advocacy work that builds on and is informed by their community relationships, funding can be a challenge. A community-based organization that has applied for a grant to support programmatic work may not be eligible to apply to that foundation for a second grant. Organizations may face the decision of cutting back services to communities in order to engage in advocacy work. As one interviewee observed:

> *The decision to engage constituents in and to do advocacy work is most often a choice by these agencies to sacrifice in some way resources that would go to direct services. It's a brave choice, and a hard one, and our funding community has not caught up with that or resourced it in the way it should.*

Conclusion

This scan set out to understand how nonprofits and funders meaningfully connect with the people and communities they hope to benefit through their advocacy and policy work. The research revealed a rich, nuanced, and layered landscape of practices and perspectives around connecting with communities. Stepping back, we observe a few overarching takeaways for the field.

▶ **Meaningfully connecting goes beyond input and feedback.** Gathering input or feedback from communities represents a valuable – arguably essential – component of developing and implementing advocacy and policy initiatives that will ultimately have the intended positive impacts. But the many examples of co-creation, co-decision-making, and power sharing illustrate that the concept of connecting is broader and deeper than the terms "input" and "feedback" imply. In advocacy and policy contexts, the definition of "meaningfully connecting" becomes entwined with goals like social, racial, and economic justice, and even societal transformation. For many who are engaged in advocacy and policy work, building community voice and power, and putting decision-making in the hands of those who are most affected by those decisions, is both the definition of connecting and an embodiment of those goals.

▶ **Equity, diversity, and inclusion (EDI) is fundamental to meaningfully connecting.** Threaded through much of this report are themes around:

- *Who is heard:* Diverse voices? Those least heard? Different kinds of experts?
- *How are they heard:* Are there authentic relationships? Do community voices have influence? Is power shared?
- *To what end:* To help communities? To learn from them? To empower them?

These themes emerged in the context of how nonprofits relate to communities, how nonprofits relate to one another, and how funders relate to their grantees and to the communities they ultimately intend to benefit. In advocacy and policy work, EDI is not just a component of meaningfully connecting – in some important way, it defines how to connect meaningfully.

▶ **There are many different ways to meaningfully connect.** Circling back to the beginning of this discussion of "what it means to meaningfully connect," the multiple definitions we surfaced (shown in Figure 1) do not represent a continuum from less desirable to more desirable. Listening in order to understand and gather feedback, informing communities about policy issues and opportunities to take action, and co-creating advocacy and policy work are all valid and valuable forms of connecting – and each can be done in a deep, meaningful way or in a shallow, inauthentic way.

Nor is it always better to use direct as opposed to indirect pathways for connecting (shown in Figure 2). For example, some nonprofits are well-placed to use approaches that involve directly engaging with individuals in a marginalized community. But others cannot – and should not – go into that community expecting to directly connect with individual community members. The trust and relationships that are so important to authentic listening and engagement may not be there. In those case, nonprofits need to use partnership models that help them listen to or co-create with local organizations that are deeply rooted in the community.

Ultimately, organizations need not focus singularly on one model for connecting; they can thoughtfully draw upon multiple definitions and pathways for connecting that are appropriate to the type of advocacy and policy work that they do, their size and location, and their organizational history and capacities. What matters most: whatever combination of practices and pathways an organization chooses to pursue, *do it well.*

▶ **There is no silver bullet methodology or tool.** It is unlikely that a single tool or method can encompass the multiple definitions of "meaningfully connecting" and the multiple direct and indirect pathways through which connecting occurs in advocacy and policy contexts. Feedback surveys, which are a valuable staple in direct service contexts, may be an important tool in advocacy and policy contexts, but they are not fully representative of the participatory principles that many advocates – and some funders – see as a core part of what it means to meaningfully connect.

▶ **Funders need to meaningfully connect.** In general, our research findings suggest that funders need to meaningfully connect with the communities they intend to benefit through advocacy and policy grantmaking. Similar to nonprofits, there are multiple approaches and pathways that funders may consider using – and which one makes sense for any given funder will vary. Some funders are in the process of figuring out what that looks like, while others may not yet be aware of or embrace the kinds of approaches and funder roles surfaced in this research. An important takeaway is that piecemeal efforts to connect – a few program officers here and there, efforts to connect that lack follow-through – can be frustrating and counterproductive. Funders need to think about meaningfully connecting through a systemic lens, examining their own internal norms and culture, as well as the structures and processes that shape how strategies are developed, how decisions are made, and whose voice is valued.

▶ **There is ample room to strengthen nonprofits' efforts to connect.** The "state of the field" regarding nonprofits' efforts to meaningfully connect may be described as relatively fragmented and uncodified. Although there are certainly many examples of "connecting done well," there appears to be wide variation in the depth and quality of nonprofits' listening practices. Indeed, some candidly acknowledged the limitations of their current efforts – and in most cases expressed a desire to address these limitations. They also perceive various capacity-related challenges in trying to do a better job.

▶ **Funders can help nonprofits connect more meaningfully.** The onus cannot be placed solely on nonprofits to "step up" their efforts to connect with communities. Funders have an important role to play in supporting these efforts. For example, grantmaking approaches should reflect an understanding of the time, money, skills, and flexibility needed to build authentic (direct or indirect) connections with communities. Funds can be directed to support specific efforts to increase connectedness. Funders can create incentives by including questions in grant applications that ask how nonprofits connect with communities – and then using that level of connectedness as an

important criterion in decisions about the size and composition of grants. Funders can also support nonprofits' interest in learning about promising practices in community engagement. In doing so, an emphasis should be placed on *listening* to grantees; that is, taking care not to force collaborations, but rather asking what kinds of learning opportunities might best help them improve their efforts to meaningfully connect.

The insights surfaced through this research reveal a field ripe with promising practices as well as considerable opportunities to strengthen, support, and institutionalize efforts to meaningfully connect. We hope the findings help Fund for Shared Insight, as well as the broader field, to advance the goal of improving philanthropy by elevating the voices of those least heard.

Appendices

Appendix A. Methodological Details

Interviews with nonprofits, funders, and other relevant experts in the field

We used multiple strategies to recruit interviewees. We began by conducting interviews with a selection of Shared Insight's core funders, along with a set of nonprofit grantees whom those funders recommended as representative of their work in advocacy and policy. Within this subset of interviewees, we focused on the two issue domains of education (including early learning) and the environment (including climate and conservation).

We then used snowball sampling to reach a wider network of organizations, asking the nonprofit interviewees to suggest funders or nonprofits whom they thought would have an interesting perspective on what it means to meaningfully connect in advocacy and policy contexts. We also drew on input from Shared Insight committee members and responses to the survey and our listserv inquiries (described below) to identify additional interviewees, including those who play consulting roles in philanthropy such as facilitation, evaluation and learning, and strategy development. This snowball sample included interviewees working on a broad array of issues, including social justice, health, economic transition, immigration, and housing.

In some cases, multiple individuals from the same organization participated in interviews. In total, the interviews encompassed 54 individuals from 40 organizations.

Table A1. Interviewees, by organization type		
	Number of Interviewees	**Number of organizations**
Funders	21	11
Nonprofits	24	23
Consultants	9	6
Total	**54**	**40**

Online survey of nonprofits

We conducted an online survey of nonprofits to widen the reach of data collection beyond those who were able to participate in interviews. The survey consisted of two close-ended questions (a screening question and a checklist of issue domains) and four open-ended questions asking respondents to describe whom they intended to benefit, what they did to meaningfully connect with those groups, how they used what they learned from those connections, and any challenges they faced in connecting.

The survey was sent to a list of 6,003 nonprofits purchased from GuideStar and supplemented by grantee lists from Shared Insight core funders, where possible. The list of recipients was designed to target organizations working in advocacy or policy contexts across diverse issue domains; in addition, we included a screening question at the beginning of the survey to confirm that respondents engaged in US domestic advocacy or policy work. **A total of 224 nonprofits provided valid survey responses – and therefore were included in our analysis**. *Valid* is defined as: the respondent indicated that his/her organization engages in advocacy or policy work *and* the respondent completed at least one of the three questions about meaningfully connecting (approximately 4% of the initial list met this definition).

Table A2. Survey respondents, by issue area		
	Number of respondents	**% of respondents**
Health (including mental health)	101	45%
Civil rights, social justice	100	45%
Environment (including climate, conservation)	68	30%
Education (including early learning)	67	30%
Housing, shelter	60	27%
Employment, labor, workforce	52	23%
Immigration, migration, refugees	38	17%
Arts, culture, humanities	14	6%
Other*	79	35%

* The "other" category included things like election reform, transportation, veterans issues, hunger, and poverty. In most cases, respondents used this category to expand upon the other issues they selected.
Note: The percentages do not sum to 100 because respondents could choose multiple issue areas.

Listserv inquiries and desk research

We sent out an inquiry to four listservs in the advocacy, evaluation, and philanthropic communities to gather examples of tools, frameworks, and other resources relevant to this landscape scan. The "desk research" component of our work includes reviewing any written materials shared through listserv or interview responses, as well as conducting follow-up interviews with individuals who offered particularly relevant and interesting listserv responses.

Appendix B. List of Organizations Interviewed

The organizations below provided their permission to be named as interviewees. Three nonprofits are kept anonymous because we did not receive their permission to list them here.

Nonprofits: 23 organizations (3 anonymous), 24 interviewees

Acadia Center
Action in Montgomery
Alianza Americas
Asian Pacific Environmental Network
Californians for Justice
Committee for a Better New Orleans (2 interviewees)
Community Resource Center
Conservation Law Foundation
Cultivando
EarthJustice
Homes for Families
Jobs for the Future
League of Education Voters
Massachusetts Advocates for Children
Media Alliance
SOMOS Mayfair
SPARC
Surfrider Foundation
Trout Unlimited
U.S. PIRG

Funders: 11 organizations, 21 interviewees

Barr Foundation (5 interviewees)
Bill & Melinda Gates Foundation (2 interviewees)
Chorus Foundation
Evelyn and Walter Haas, Jr. Fund
Ms. Foundation for Women
Raikes Foundation
Social Venture Partners Portland
Trans Justice Funding Project
Vancouver Foundation
William and Flora Hewlett Foundation (6 interviewees)
W.K. Kellogg Foundation

Consulting and Supporting Organizations: 6 organizations, 9 interviewees

Action Evaluation Collaborative
Bridgespan (2 interviewees)
Building Movement Project (2 interviewees)
Feedback Labs
FSG (2 interviewees)
Independent Consultant

Appendix C. List of Resources

Frameworks for Defining Different Levels of Community Engagement

- ▶ Building Movement Project's client voice and engagement continuum.
- ▶ Roger Hart's ladder of participation.
- ▶ Foundation Consortium's framework for inclusive governance, arrayed along a continuum from exclusive to inclusive.
- ▶ Three models of participation outlined in the Appendix of The Foundation Center's report on participatory grantmaking.

Frameworks and Guidance on Inclusive and Participatory Decision-Making Approaches

- ▶ Building Effective Youth Councils: A guide from the Forum for Youth Investment describing key steps for creating effective youth councils, along with concrete examples. While the guide focuses on youth engagement in government, much of its contents is relevant to nonprofits or funders seeking to establish advisory councils of either youth or adults to inform or co-create advocacy and policy work.

- ▶ From the Bottom Up: A report examining how membership-based organizations can engage more intentionally with community members. It includes concrete examples of three inclusive decision-making models: collective governance structures, consensus and modified consensus decision-making, and special advisory boards.

- ▶ Community-Engagement Governance Framework: An article describing a framework in which responsibility for governance is shared across an organization's stakeholders, including its constituents and community.

- ▶ A framing paper on the Promotor Model, authored by Esperanza Community Housing, Latino Access Health, and Visión y Compromiso, and funded by the California Endowment.

- ▶ Deciding Together: Shifting Power and Resources through Participatory Grantmaking: An in-depth resource describing the core elements of participatory grantmaking, benefits, challenges, decision-making roles, and sample models.

- ▶ Mechanics of Participatory Grantmaking: Concrete descriptions of how individual funders have set up the participatory process.

- ▶ Bolder Together 2: A report describing the California Civic Participation Funders' experience with co-creation and partnership approaches.

- ▶ The Vancouver Foundation's Youth Engagement report on lessons learned from its use of youth advisory groups in advocacy initiatives.

Resources for Facilitating Community Discussions

- ▶ A toolkit covering multiple community engagement tools, including visioning workshops.
- ▶ A brief set of guidelines for conducting visioning exercises.
- ▶ A description of the World Café methodology, an approach for hosting large group dialogue.
- ▶ A resource called Liberating Structures, describing approaches to facilitating various kinds of group discussions.

- A brief overview of how graphic recording and graphic facilitation can help support productive group discussions.
- A description of Art of Hosting methods for dialogue and conversation, including Pro Action Café and Open Space Technology approaches.
- An overview of how to use Collective Story Harvest.
- Action for Inclusion: A Resource Kit for Community Conversations. A resource kit to help organizations engage with the diversity of communities in meaningful ways. Includes a thoughtful discussion of different dimensions of diversity, and a detailed set of tips for organizing inclusive and accessible meetings or events with community members.

Tools for Addressing Power Dynamics and Institutional Norms Reflecting White Dominant Culture

- A tool from the National Community Development Institute describing different sources of power and ways to reduce power differences.
- An organizational cultural competency assessment in *The Handbook of Community Practice*, 2nd edition. It includes questions around power dynamics and who has decision-making power.
- A worksheet identifying norms of white dominant culture and alternatives to those norms, including around power sharing and decision making.
- Changework Dismantling Racism Workbook.

Tools to Help Direct Service Nonprofits Engage in Advocacy Work

- The Building Movement Project's Engage to Change initiative and free repository of tools are designed to help build the capacity of direct service organizations to engage in social justice and advocacy work and to meaningfully involve constituents in those social change efforts.
- Nonprofits Integrating Community Engagement (NICE) Guide: Developed by the Building Movement Project and the Alliance for Nonprofit Management, this guide aims to help service organizations think about how to engage participants in social change work. It is full of tools and resources that organizations doing a mix of direct service and advocacy might find helpful.
- The Alliance for Justice's Advocacy Capacity Tool is a benchmarked guide that organizations can use to self-assess their readiness to take on advocacy. The Alliance also offers numerous other free tools and resources to support nonprofits' advocacy and social change efforts.