Building Capacity to Sustain Social Movements:

TEN LESSONS FROM THE COMMUNITIES FOR PUBLIC EDUCATION REFORM FUND (CPER)

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Ten Lessons from the Communities for Public Education Reform Fund (CPER)

By Melinda Fine and Lauren Jacobs

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INTRODUCTION:
Leveraging Investments through Capacity Building

Most funders agree that effective grantmaking requires pursuing a range of complementary approaches. Direct grants are the lifeblood of organizations and the cornerstone of funder practice, but grantmakers also provide critical value when they help grantees develop organizational leadership and governance, strengthen strategic collaborations with peers, network with new allies, and expand field knowledge, among other things.

This report explores how grantmakers can leverage their investments by coupling direct grants with strategically delivered capacity building supports. It focuses on building capacity for community organizing and advocacy groups, though many of its lessons are more broadly applicable.

Capacity building differs from direct grantmaking in that it focuses on building a sustainable infrastructure and enhancing an organization's ability to advance its mission and goals. Capacity building supports typically focus on internal organizational functions, such as leadership development, governance, evaluation, technology, communications, and solidifying a funding base. Training and technical assistance are common capacity tools. Funders that envelop targeted organizational supports within a broader, field building approach also tap intentional collaborative vehicles, such as peer-to-peer learning. Whatever the focus, capacity building is a well-recognized – though arguably still underutilized – grantmaking strategy for leveraging investments.

In *The Important and the Urgent: Challenges of Social Change Leadership,* Rea Carey, executive director of the National LGBTQ Task Force, makes a strong case for investing in leadership development, a foundational capacity support. Carey's argument applies just as well to the larger capacity building endeavor:

> *If you want your grants to be successful, if you want your grantees to do their best job at meeting their deliverables and moving the ball forward in their movements, you have to invest in [capacity building]…. It's almost like adding protein powder to your grants.*[1]

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[1] Cited in *The Important and the Urgent: Challenges of Social Change Leadership,* Evelyn and Walter Haas Jr. Fund, www.haasjr.org/what-were-learning/resource/important-and-urgent. Carey's original comment refers specifically to leadership development; the broader framing here is by the report authors.

At the Communities for Public Education Reform (CPER) Fund, we see capacity building as a field building strategy. CPER (hereinafter also referred to as the "Fund") is a national funders' collaborative committed to improving educational opportunities and outcomes for students – in particular students of color from low-income families – by supporting community-driven reforms led by grassroots education organizing groups.

A highly effective lever for change, community organizing nevertheless requires considerable time, stamina, and strategic savvy to realize results. Organizing seeks to bring community members together to analyze issues, identify shared goals, map power structures, and develop strategies that they put into action together. Through this approach, organizing helps build community leadership and power while propelling policy change. These sustained civic capacities can be tapped policy after policy, issue after issue, year after year.

CPER's multi-year investment in community organizing sought to achieve systemic education policy reforms while building youth and parent leadership, a grassroots base, and civic skills for the long term. The Fund's strategies accordingly included direct grants to groups in specific locales; resources and services to foster collaboration across diverse organizations, constituencies, issues, and regions; and capacity supports to fortify individual groups and strengthen field infrastructure overall. Although the majority of CPER's funding was dedicated to organizing groups, the Fund also supported allied advocacy organizations, which also received capacity building services.

This report begins by describing core features of CPER's capacity building model. We follow with ten lessons learned about effective capacity approaches. Next, we ground this discussion by describing the most common capacity challenges CPER grantees faced and the ways we sought to address them; we also recommend grantmaker actions to bolster the capacity of groups that are working for change in education as well as other issue areas.

CPER's experience suggests that social change funders stand to gain by lodging targeted, organization development supports within more holistic and far-reaching efforts to build capacity in fields as a whole. We hope this report will deepen funders' understanding of key capacity challenges that community organizing and advocacy groups need to surmount – education organizing groups, in particular – while contributing to a larger conversation about how grantmakers can most effectively build capacity in social change fields committed to advancing movements for opportunity and justice.

If you want your grants to be successful, if you want your grantees to do their best job at meeting their deliverables and moving the ball forward in their movements, you have to invest in [capacity building]…. It's almost like adding protein powder to your grants.

—Rea Carey, executive director of the National LGBTQ Task Force

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Capacity building as field building: an imperative in today's educational landscape

Over the past two decades, public education has undergone a sea change. Particularly in large urban districts, traditional public schools are being replaced by privately operated charter schools. Mayoral or even state control is replacing elected school boards. Powerful investors are funding structural and policy reforms that change the face of education in our cities. Low-income communities are being heavily impacted by these reforms, and yet the decisions to move forward are too often happening behind closed doors.

In communities where grassroots organizing groups traditionally build their membership through neighborhood-based chapters, these reforms change the very nature of organizing. When parents in a single community are likely to be sending their children to a marketplace of schools across the city – some governed by a local district, others by private boards – it is much more difficult to bring parents together around education reform. In fact, these new landscapes can pit parents *against* one another as they compete for precious seats for their children.

How do grassroots community groups begin to connect the dots and develop strategic campaigns to strengthen public education in their communities? How do they bring together members and leaders around a new decentralized education system? How do they build and maintain their base in this new context?

One way is to come together *across* cities and states, supported by national-level technical support providers who can offer the research, connections, knowledge base, facilitation, and organizing support to help.

This has been the function of CPER's capacity building initiative. **Through CPER, a range of support providers have been able to keep one eye on the big picture while local groups pound the pavement in impacted communities. Working together with national intermediaries, research organizations, or other technical support groups, grassroots organizations can build relationships across geographies** to coordinate local strategies; find the research to craft their demands; build the case for their positions; and amass more power to win changes that affect multiple communities at once. CPER's support for such organizations helped forge multiple new, important efforts to strengthen public schools, and the parents, students, and educators who cherish them.

– Leigh Dingerson, consultant,
   Annenberg Institute for School Reform at Brown University

THE CPER MODEL:
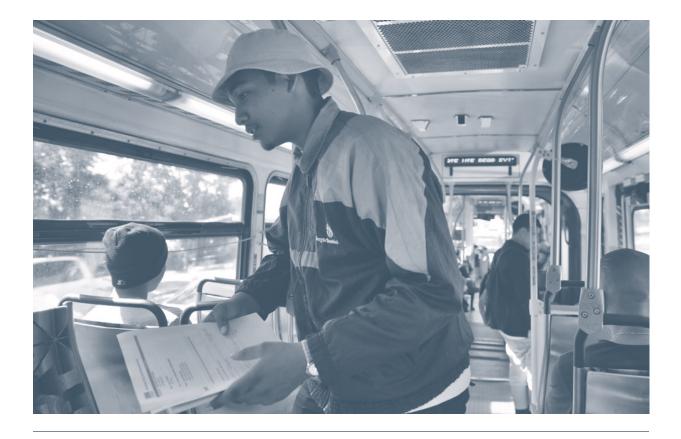## Strategies to Support Capacity Building

In 2007, funders active in Grantmakers for Education's Working Group on Education Organizing (WGEO) launched Communities for Public Education Reform (CPER), in partnership with NEO Philanthropy (then Public Interest Projects), the 501 (c)(3) public charity engaged to direct the Fund. Over an eight-year period, **NEO engaged a highly diverse set of 76 local and national funders in the CPER collaborative, raising close to $34 million and investing nationally in some 140 community groups and advocacy allies in national coalitions and in six target sites** of varying scale (California, Chicago, Colorado, Mississippi, New Jersey, and Philadelphia). **These groups, in turn, developed local leadership, national coalitions, and cross-issue alliances that helped to win over 90 policy reforms that strengthen educational equity and opportunity.**[2]

Building community power to achieve systemic policy reforms was central to CPER's mission from the get go. In the Fund's initial years, strategic inputs and resources focused on directly supporting clusters of strategically savvy but often financially fragile organizations within the Fund's investment sites across the country. Supported groups shared site-level policy goals while pursuing campaigns embraced by their individual organizations. Locally based consulting staff coordinated and facilitated work across groups, supporting CPER's national staff at NEO Philanthropy in conducting due diligence and facilitating the work of local donor tables. National staff also worked to bridge donor members and grantees by carrying out all grantmaking and grantseeking responsibilities, and bringing both funders and grantees together in annual convenings, donor briefings, and other venues. In this early period, capacity building supports were relatively minimal and largely provided on an ad hoc basis.

As Fund resources expanded and investments began to have an impact, the education organizing field itself matured, growing in both strength and numbers. At the same time, challenges in the overall education environment expanded, and groups struggled to tackle onslaughts to equity and excellence that included slashed public school budgets, increases in high stakes testing, massive neighborhood school closings, and harsh disciplinary policies – to name just a few. To amplify the voice of youth and parents fighting for similar reforms, groups increasingly sought to connect with one another across regions. Both organization and field-wide needs increased and crystallized.

Striving simultaneously to support dynamic field growth and to respond effectively to shifting environmental conditions, CPER donors and staff reflected on Fund strategies and impacts while

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[2] For a discussion of CPER's overall grantmaking model and impacts, see *Greater Power, Lasting Impact: Effective Grantmaker Strategies from the Communities for Public Education Reform*. For analysis of strategies to foster collaboration among groups, in particular, see *Strengthening Collaboration: Ten Lessons from the Communities for Public Education Reform Fund*. Both reports are available for download at www.neophilanthropy.org.

taking stock of field gaps and needs. We decided to significantly ramp up capacity supports to CPER's grantees. To inform development of this new effort, our staff and consultants conducted an intensive field scan that involved reviewing successful capacity building models as well as speaking with grantees, CPER local site coordinators, and Fund members to identify field needs. Capacity building programs developed by other NEO Philanthropy collaboratives, such as the Four Freedoms Fund, proved particularly instructive during this period. CPER also drew on strategies to strengthen capacity and campaign development piloted by CPER's local Colorado funder table, as well as on peer funders' earlier efforts, such as those pursued by the French American Charitable Trust.[3]

This six-month, multi-part inquiry resulted in the design of a new, comprehensive, national capacity building initiative that was grounded in clarity about organizational and field-wide needs as well as research about best practices. **A generous part of the Fund's budget was apportioned to this new pilot effort, but the bulk of resource dollars remained in direct grants and various other vehicles to foster collaboration among groups, such as convenings.** CPER's national capacity building program operated successfully for three years, until the Fund entered its final spend down period.

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[3] See *Strengthening Organizations: A Capacity Building Program Report from the French American Charitable Trust (FACT), 2004-2012.* Though FACT has spent down its endowment, its approach to capacity building work with community organizing groups continues through its organizational spinoff, RoadMap.

CPER Capacity Building Model

FIELD ASSUMPTIONS

- Education organizing groups have grown in number, knowledge, and skills over CPER's initial years of funding. These positive developments notwithstanding, organization development and campaign **needs persist in core areas such as leadership development, strategic communications, assessment, fundraising, business planning, campaign strategy development, governance, and technology support.**

- While many pockets of strong localized work exist, **the field needs effective vehicles to strengthen collaboration, learning, and shared strategizing** across geographies, constituencies, and issues.

- Education is a relatively new focus for many community organizing groups. To wage successful campaigns, **groups need to deepen their understanding of education strategies, research, and policy advocacy.**

PROGRAM OBJECTIVES

- **Strengthen organizational capacity** around key organizational development needs.

- **Deepen knowledge** of education reform and policy advocacy strategies to heighten effectiveness of campaigns.

- **Enhance field cohesion** through shared learning and strategizing.

GUIDING PRINCIPLES

- **Supplement not supplant:** pair capacity supports with continued, stabilizing direct grants

- **Pull not push:** encourage rather than mandate participation

- **Bolster not burden:** use a simple application process and manage all program logistics, making it easy for grantees to get the assistance they seek

- **Coordinate not duplicate:** identify gaps and align supports with other peer funding efforts

- **Honor local practice:** balance local decisions about what's needed with resource coordination to achieve scale and strengthen connections across regions

- **Experiment:** pilot different approaches to meet highly differentiated needs

- **Remain nimble:** adapt and retool program features as needed, in response to feedback and new opportunities and challenges

MENU OF CAPACITY BUILDING COMPONENTS

- **Technical assistance:** tailored support services addressing the specific needs of individual organizations

- **Multi-group trainings:** interactive learning opportunities meeting common capacity needs within and across sites and/or campaigns

- **Follow-up supports:** specialized services to organizational participants of group trainings, helping these groups put lessons learned into organizational practice
- **Peer learning communities:** multi-group, cross-site cohorts engaged in cycles of learning, reflection, research, policy analysis, and campaign development around specific education topics identified by grantees
- **Rapid-response grants:** quick turnaround, supplemental funds enabling groups and alliances to seize emerging opportunities and/or confront unanticipated challenges
- **Supplemental grants:** ancillary supports for groups to attend trainings and conferences hosted by peer funders and allies

OPERATIONS

- **Capacity building providers:** provided training, coaching, research, facilitation, and other support services
- **Local site coordinators:** worked with grantees and national staff to prioritize needs, identify effective delivery mechanisms, and manage logistics on the ground
- **National capacity building program coordinator:** coordinated all program elements, such as sharing information on available supports to stimulate grantee pull, vetting grantee requests, identifying and shaping supports to meet multi-site needs, matching providers and grantees, and serving as communications point person
- **CPER national staff at NEO Philanthropy:** developed and oversaw capacity building program, with responsibilities such as supervising staffing, approving budgetary allocations, managing contracts and grants, synthesizing assessments to solidify field knowledge, and communicating broad needs and progress to CPER funders, while safeguarding sensitive grantee information

RESOURCES

- **Up to $600,000** approved per 12-month grant calendar
- **Total investment:** $1 million

ASSESSMENT

- **Grantee and local coordinator assessment** of provider knowledge, fit, and service value through surveys and verbal debriefs
- **Grantee tracking of relevant change indictors,** such as increased revenue following fundraising trainings, through informal communications and grant reports
- **Capacity provider assessment** of grantee learning and continuing needs, through debriefs with national staff and lead capacity coordinator
- **National staff synthesis** across provider and grantee assessments to identify field patterns, progress, and continuing needs

CAPACITY BUILDING KNOWLEDGE:
Ten Lessons for Grantmakers

What did we learn about effective funder practices to build capacity in community organizing and advocacy groups? Here are ten lessons grounded in the insights of CPER grantees, capacity support providers, and staff.

1. Leverage direct grants with supplemental supports

Grassroots organizations are chronically under-resourced. They depend on direct grants for staff and program support, and must continuously fundraise to cover their needs. It's not surprising, then, that if there's a trade-off, groups are likely to choose direct support over capacity resources. To maximize an organization's ability to engage in capacity building work, **funders must consider allocating dedicated resources, *supplementing* rather than *supplanting* direct grants.**

2. Target resources to groups that are ready for them

A sound resource investment requires intentional commitment to engage in the work. But organizing staff and community leaders are busy people, often working long days, nights, and weekends. Though groups may need to build capacity in key arenas, time devoted to capacity activities pulls from time needed for pressing program work. As capacity provider Marjorie Fine (see pages 20-21) acknowledges, "Groups must really want it. They need to make a commitment and show up for the calls or the trainings."

Requiring involvement when groups are neither ready nor eager to participate is likely to backfire. That said, funders can encourage grantees' engagement by incentivizing involvement, making their participation easy through simple application processes and giving groups voice in selecting the supports they need and the providers with whom they would like to partner.

3. Be clear on expectations

Funders, grantees, and capacity building providers must agree at the outset on their expectations for capacity investments. Capacity building providers Amanda Cooper and Holly Minch of LightBox Collaborative (see pages 22-23) recommend that both funders and capacity trainers work with grantees to "right size" their goals, making sure their expectations for change align with the resources available as well as a group's strategic sophistication and abilities:

> *The most successful training content meets grantees where they are in terms of their knowledge and experience, so it is easy for them to share and replicate with extended staff, collaborators, and allies.…The key ingredients for successful capacity building include the alignment of grantee and funder around the goals for the engagement, such as long-term capacity building or more short-term strategic investment in a particular outcome. Targeted training that closely tracks grantees' current skill set yields the best results, and where that assessment can't be made to scale, or where there is a wide range of competencies, coaching or strategic interventions might be more fruitful.*

4. Match grantees and providers with care

Building capacity within organizing groups demands particular care. Community organizing groups share policy objectives with advocacy allies, but organizing has its own distinct methodology and mission. Capacity building provider Leigh Dingerson of the Annenberg Institute for School Reform (see pages 28-29) notes, "The building of knowledge and self-awareness, political appetite, and collective power is, at heart, just as important in community organizing as the policy or community victories or losses." In this context, effective capacity providers must bring more than knowledge of a skill or issue area to a group. They must also bring deep understanding of – if not actual experience with – grassroots organizing and its core values, as well as a commitment to building sustained power as an outcome of the work.

Funders can play an important role in identifying and vetting knowledgeable capacity providers whose skill sets, knowledge base, and experience matches the needs of grantees. They can also help manage logistics and administrative tasks to lessen burden on supported groups. Giving grantees a say in selecting their capacity providers is also critical, so grantees trust their partners and buy in to the work.
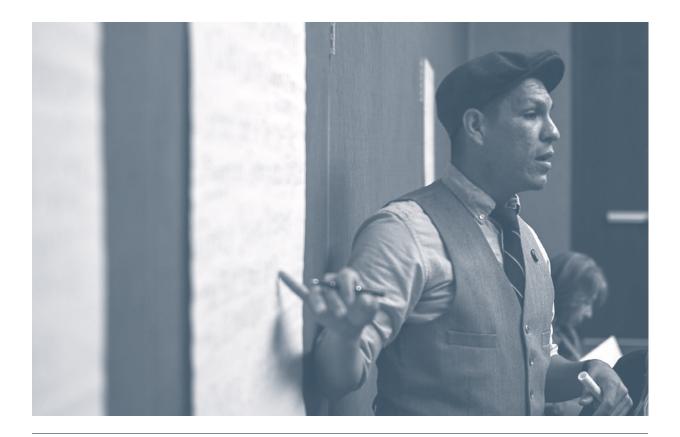
5. Allow time for relationships to develop

Capacity building seeks to build skills and knowledge that will stay with a group long after a provider has completed his or her engagement; **it is grounded in relationships between providers and grantees that develop over time.** Capacity building provider Jim Freeman of the Grassroots Action Support Team (see pages 26-27) observes:

> *The best support organizations build mutually respectful, sustainable relationships by being mindful of their role, prioritizing their partners' organizational needs over their own, and being willing to invest deeply in the communities they serve….The "how" is just as important as the "what."*

CPER found that **a combination of group trainings followed by targeted coaching to a subset of grantees allowed for the time needed to build trusting relationships and translate learning into practice.** By starting broad and then engaging more intensively with a subset of groups, we were able to balance reach with depth, directing concentrated supports to grantees most interested in further developing their learning.

6. Tailor supports to meet different needs

Success requires customization, flexibility, and an ability to adapt to particular circumstances. Group-oriented approaches (like trainings by region or campaign issue) help address common needs, strengthen collaboration among key partners, and maximize economies of scale. Targeted, organizational approaches (like technical assistance) tackle specific internal, organizational development needs. In the CPER capacity building model, we offered a diversity of group and targeted approaches (see pages 8-9). All capacity resources and service options were open to all grantees, and grantees themselves chose whether and/or when to participate, and through what means.

7. Time services strategically

An organization's capacity needs reflect both internal conditions (such as organizational history, staff, programs, and resources), and environmental factors (such as local policy context, community strengths and challenges, and local allies and foes). **The best capacity building meets groups where they are, addressing their specific needs in timely, tailored, and practical ways.** This requires a flexible and agile support structure that can respond quickly to emerging needs when they arise.

Amanda Cooper and Holly Minch of LightBox Collaborative argue that **capacity building is often most effective when groups are trying to reach a new level or are focused on achieving a specific goal:**

> *If you can find ways to offer trainings at the right time, when groups will be able to put their learning into action quickly, it increases the value of the offering by creating opportunity for practice and feedback and reinforcing learning. For example, spokesperson training done right before a speaking engagement allows people to use, test, and improve new skills, and produces better results than general skills building that is not time sensitive.*

8. Support strategies to build field capacity

When change goals are large and far-reaching, no single organization can achieve them. Rather, big changes depend on a well-networked and coordinated base of grassroots activists, advocacy allies, researchers, and stakeholders that are committed to moving the ball forward — together. For social change funders, **building stronger organizational capacity must be seen as a first step toward building field-wide capacity as a whole.**

Collaborative learning vehicles such as peer learning communities and convenings bring groups together across issues, sectors, and change strategies. These off-site forums help partners place their

local experience in national context, enabling groups to strategize across regions and see themselves as part of a larger, more powerful whole (see page 5). Admittedly, however, these types of activities pull groups away from addressing immediate, on-the-ground needs.

We found that engaging grantees in shaping the content of these activities from the beginning fostered their eagerness to participate. **When driven by or responsive to grantees' interests, these types of collaborative learning vehicles nurture the conditions that accelerate effective collective action.**[4]

9. Synthesize perspectives to construct a field-wide picture

Grantmakers have a unique perch. By engaging with peer funders, grantees, and capacity support organizations, they acquire a bird's-eye view of the state of the field. **Integrating diverse perspectives provides grantmakers with a comprehensive field picture that can be helpful to grantees and peer funders alike.**

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[4] See *Strengthening Collaborations to Build Social Movements* for a description of CPER's peer learning communities and annual convenings. Available for download at www.neophilanthropy.org.

CPER's national staff and capacity building coordinator solicited input on capacity challenges from the Fund's local site coordinators; grantees (through feedback forms and annual reports); capacity providers (through verbal debriefs and written assessments of services); and peer funders. These qualitative assessments were of value, but relatively informal. With more time and resources, we would have institutionalized mechanisms to share learning among groups and support organizations. With grantee input, we would also have developed **simple assessment metrics to assess capacity change.**[5]

An approach taken by the capacity support organization RoadMap is illustrative in this regard. Working closely with a vetted pool of organizational development consultants, RoadMap periodically **brings together its consulting team to share knowledge, insights, strategies, and suggestions with one another.** Among other benefits, this approach equips consultants to better serve individual organizations while engaging all parties in a collectively constructed view of field needs and progress.

10. Reflect, revise, and retool as needed

At its best, **grantmaking is a dynamic art.** Efforts evolve over time; they are responsive to strategic gains and losses, assessments of impact, environmental shifts, and changes in available resources.

Over its eight-year trajectory, CPER remained true to its mission of improving educational opportunities and outcomes for low-income students of color by supporting community-driven reforms led by grassroots education organizing groups. However, the Fund's grantmaking strategies and operational features evolved to better support the developing strength and reach of grassroots groups. In the arc of CPER's lifecycle, **capacity building – initially an informal and relatively ad hoc program input – became increasingly important to our goal of solidifying and amplifying field strength.**

The Fund's overall ability to adapt and elevate promising strategies mid-course paralleled its willingness to revise and retool features within the capacity building program itself. For example, finding that some groups pulled extensively for capacity supports, while others (which needed them just as keenly) did not, we intensified and formalized mechanisms to encourage groups' request for services, while allowing greater diversity in the kinds of activities these resources could support. Similarly, finding that groups valued broad group trainings, but sometimes stumbled in implementing lessons learned, we added targeted, follow-up coaching for group training participants who needed more sustained supports. These shifts, and others like them, were facilitated by CPER's multi-tiered staffing and by NEO Philanthropy's ability to turn around grants and contracts very quickly once grantees' needs were known. **Remaining nimble, responsive to genuine feedback, and open to experimentation helps ensure that capacity supports provide maximal value and meet both funders' and grantees' needs in real time.**

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[5] For assessing capacity building, see the Four Freedoms Fund at www.neophilanthropy.org/fff. For assessing community organizing overall, see *Getting to Outcomes: A User's Guide to a Revised Indicators Framework,* available for download at www.neophilanthropy.org.

CAPACITY SPOTLIGHTS:
Common Organizing and Advocacy Challenges

While capacity needs varied across groups, five areas emerged as common challenges among many of the Fund's grantees working to advance educational justice:

fundraising
strategic communications
evaluation
policy research and advocacy
alliance building

We believe these capacity challenges are common to groups working in other social change areas as well. In this section, we dive deeper into these capacity areas, elucidating why these needs are so persistent and identifying supports and approaches CPER pursued to address them. To encourage effective grantmaker investment in capacity building work, we also note evidence of impact and recommend actions peer funders might take to build capacity among these kinds of groups.

Spotlight on building financial capacity

NEED

Social change organizations must be on stronger financial footing if they are to maintain a foothold – much less to grow in numbers, reach, and impact. While all nonprofits must continuously raise funds to meet their organizational budgets, community organizing groups face particular challenges in doing so.

Unlike social service organizations, organizing groups typically lack access to government grants. Because these groups work in low-income communities, their members can contribute only minimal resources. Most groups are overwhelmingly dependent on foundation funding, a chronically problematic situation because, as noted by the National Committee for Responsive Philanthropy, social justice grantmaking "comprised [just] 12 percent of the grant dollars of the nation's largest foundations in 2011," and the "median funder provides just 2 percent of [its] grant dollars for social justice grantmaking."[6] Moreover, in this period of "strategic philanthropy," foundations have increasingly sharpened their focus, and organizing groups, in particular, have struggled to match their community-driven priorities to foundations' more circumscribed agendas.

Conditions internal to organizing groups compound these environmental challenges. Because most social change groups are small, fundraising responsibilities often rest with staff who have little or no background in this arena. Executive directors typically bring program experience, and perhaps some familiarity with writing proposals and reports, but little knowledge of how to shape an effective organizational strategy to generate funds. Similarly, board members of community-based groups bring community perspective or topical expertise, but also typically lack fundraising experience. To sustain and grow vital work, both staff and board members must develop further in this arena, strengthening an organization's ability to secure foundation grants while creating long-term fundraising plans that help groups diversify their revenue.

SUPPORTS

To address these capacity needs, CPER engaged organizational development consultant and trainer Marjorie Fine. Fine provided day-long, multi-group trainings in each of CPER's six investment sites, with additional time built in for individual group consultations. Trainings addressed common capacity gaps, with emphasis varying according to site needs. Following these broad group trainings, interested groups received tailored, follow-up supports from Fine, such as executive director coaching, review of written materials, and additional fundraising training for staff and boards of directors. On occasion, CPER was able to share costs for these services with other donor collaboratives at NEO Philanthropy that supported some of these same groups, thus amplifying donors' efforts and strengthening intersections across the fields of education, immigration reform, and juvenile justice.

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[6] See Niki Jagpal and Kevin Laskowski, *Smashing Silos in Philanthropy: Multi-Issue Advocacy and Organizing for Real Results.* National Committee for Responsive Philanthropy, Washington DC, 2013, p. 14.

APPROACH

Through role plays and other exercises, Fine helps training participants:

- shape multi-year fundraising plans;
- engage all staff, members, and directors in generating resources;
- integrate revenue generation within the organization's ongoing work;
- identify and build relationships with major donors; and
- craft donor campaigns and events, building on organizational milestones.

Recognizing that most people feel uncomfortable asking for money, Fine begins trainings by giving participants space to voice those feelings, and then helps them get beyond their discomfort by comparing fundraising to more familiar (and comfortable) activities:

I believe in starting where the people are, so I grounded all the [CPER] trainings in fundraising as an organizing activity, since these participants were primarily organizers, activists, and advocates. This gave people confidence. They realized they knew more about fundraising than they thought they knew when they first came in the door, and that the tenets were similar: the importance of relationships, the need for campaigns, and the usefulness of evaluation and taking an institutional approach.

PAYOFF

CPER groups took solid steps forward, for instance by hiring a full-time development director, creating a fundraising plan, engaging the full staff in donor identification and fundraising activities, and diversifying revenue sources. Many groups re-thought their usual solicitation and event strategies and experimented with new formats, such as house parties. For example, Public Citizens for Children and Youth in Philadelphia launched its first major fundraising campaign, in honor of its departing director, and within six months raised $340,000 from individual donors.

RECOMMENDATIONS

Fine recommends that grantmakers:

- work with grantees to identify realistic fundraising targets, based on an organization's staffing and resource capacity;
- encourage executive directors to develop long-term fundraising plans;
- sit in on a fundraising training to gain a better understanding of the challenges grantees face and the comprehensive approach they need to take; and
- provide multi-year funding for groups to hire full-time development staff.

Spotlight on building strategic communications capacity

NEED

Social justice activism revolves around communication: framing issues, engaging community members, convincing people to take action, and persuading policymakers. An effective communications strategy is inseparable from campaign development and essential to achieving impact. However, many activists think of communications as coming into play only in the final stage of a campaign, when spokespeople must be prepared and press releases issued. While these are certainly important end-stage tasks, communications work must begin much earlier, with the initial articulation of campaign goals.

Most social justice groups need coaching or training to help them integrate strategic communications effectively. For example, many groups fall into the trap of building campaigns around their own values, rather than identifying the values of their target audience and framing messages in ways that are likely to appeal to them in order to spur desired action. This is not surprising, since communications responsibilities in leanly staffed social justice organizations typically fall upon staff who lack experience in this arena (just as with fundraising).

Today's new media environment raises new challenges as well. With newspapers shrinking in number and staff, earned media coverage has become harder to capture. While new media venues allow groups to expand their reach, organizations must go beyond merely accumulating Facebook friends and Twitter followers to have impact.

SUPPORTS

To help groups achieve their goals and use their resources more effectively, CPER engaged LightBox Collaborative, an organizing-savvy capacity provider with expertise in strategic communications. LightBox provided diverse supports attuned to grantees' needs. Some groups chose to participate in a LightBox communications workshop at a national CPER convening. New Jersey and Philadelphia grantees subsequently participated in a joint, day-long on-site workshop, with follow-up coaching for interested groups. Some Chicago grantees travelled off-site to participate in an intensive, five-day "Spin Academy" to fortify their communications skills.

California CPER grantees solicited extensive communications capacity services to support their campaign for a ballot initiative (Proposition 30) that would generate additional revenue for public education by raising taxes on California's wealthiest residents. To help groups effectively counter public resistance to increased taxation, LightBox provided extensive coaching to grantee staff and community leaders, and conducted more than a dozen, in-depth trainings on strategic campaign and communications planning, storytelling, messaging, and framing.

APPROACH

LightBox helps groups see the integral relationship between strategic communications and other campaign activities. LightBox's Amanda Cooper and Holly Minch observe:

Strategic communications is an essential element for any effort to engage community and make change.…We refuse to silo the discipline. We work with our clients to ensure that their communications efforts are tied, strategically and organically, to their broader vision and goals. The shifting landscape of electronic communications means that more and more, communications and organizing are one and the same. This makes it even more essential for community organizers to integrate communications, organizing, and policy staff and strategies.

LightBox shapes its trainings around participants' current campaigns so that trainings function as work sessions, rather than as dissociated opportunities to acquire new skills. Though groups are most likely to identify their capacity needs in terms of campaign messaging, Lightbox starts by investing substantial time in goal-setting, before working with groups to idenitfy audiences, articulate messages, and choose engagement strategies. Cooper and Minch explain that articulating measurable, realistic, and time-bound goals pays off down the road:

Lightbox's clients and their funders often push back when they see how much time we plan to devote to goal setting in our training and strategy session agendas. However, when grantees are asked to define success for their efforts in ways that are strategic and measurable, they often need more time and support to fully develop their campaign goals.

PAYOFF

With LightBox's assistance, CPER grantees better defined their goals and refined their campaign messaging and implementation. California grantees enhanced their ability to frame messages around voters' values, get powerful stories covered through diverse news outlets, and greatly expand social media work. Their increased communications capacity contributed directly to a huge victory: California grantees and their allies succeeded in passing Proposition 30 in 2012. The ballot win yielded an additional $3 billion for public education in FY 2013 alone.

RECOMMENDATIONS

LightBox Collaborative recommends that grantmakers:

- assess organizations' differentiated needs and provide supports accordingly, such as targeted coaching partnerships or trainings by cohorts' skill level;
- offer supports for communications capacity building early in groups' campaigns, so that they can integrate learning throughout campaign development and use resources most strategically;
- build in plenty of time for grantees to translate their initial, broad ambitions into measurable, realistic, and achievable goals; and
- support grantees in activities that will help them reach new audiences through means such as audience segmentation, research into values, message development, and identification of effective delivery mechanisms.

Spotlight on building evaluation capacity

NEED

Whatever the endeavor, evaluating progress toward goals is vital. Evaluation helps groups adjust their strategies and efficiently target their resources for greater impact. Evaluation also enables groups to obtain support, as foundations expect groups to demonstrate outputs and outcomes in order to justify their investment.

Campaigns seeking to change policy and institutional practice frequently confront evaluation challenges. It is difficult to attribute causality in a complex and dynamic environment, and rarely can one actor, or even one coalition, claim to have single-handedly achieved policy change. In addition, it takes a long time to achieve policy outcomes—much longer than a funder's usual granting timeline. Despite these challenges, organizations need to be able to document their role in and contribution to policy campaigns, while acknowledging that other forces are also at play.

Organizing groups face additional evaluation challenges as well. Organizing seeks to achieve policy change in a way that increases the leadership and civic capacity of community members for the long term; accordingly, organizing outcomes encompass change in individuals and communities as well as the policy realm. However, evaluation metrics—and funders—frequently ignore (or give more cursory attention to) these other dimensions.

Some aspects of evaluation are familiar to organizing groups. For instance, organizing groups customarily debrief events to identify weaknesses, opportunities, and next steps. Many groups also analyze past campaigns as part of regular strategic planning processes. For the most part, though, these assessments are relatively informal, relying on staff and community member reflections rather than diverse data sources and the more structured and rigorous kind of analysis that funders often expect.

SUPPORTS

CPER sought to help groups better understand, document, and communicate their accomplishments to funders and other stakeholders. Towards that end, CPER contracted with Fund partner Research for Action to produce *Getting to Outcomes: A User's Guide to a Revised Indicators Framework for Education Organizing.* Designed to help both grassroots groups and funders identify and track meaningful indicators of organizing change, *Getting to Outcomes* describes a "theory of change" for how organizing works and proposes relevant data sources and methods to help groups measure impact on individuals, communities, policy, and practice.

To help organizations put theory into practice, CPER also engaged Guide authors Eva Gold and Elaine Simon to conduct workshops with CPER groups across the country.[7] Grantees in Chicago, Mississippi, New Jersey, and Philadelphia participated in trainings on site; others were able to access these workshops through online

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[7] The *Getting to Outcomes Guide* and video recordings of workshop sessions are available for download at www.neophilanthropy.org.

video recordings of the sessions. Finally, Gold and Simon were engaged for tailored coaching services, such as providing feedback on grantees' foundation proposals and advising grantees on evaluation design and data collection methods for campaigns.

APPROACH

Having worked in partnership with grassroots organizing groups for years, Gold and Simon articulate challenges groups often face in meeting their funders' assessment expectations:

Organizers are most typically trained to think in narratives that tell the stories of people, their issues, and how they are working to change the reality of their communities and children. They are not trained to think in the more abstract or conceptual terms of indicators and measures. Although impacts may be embedded in compelling narratives, it is often difficult for organizers and leaders to extract outcomes and impacts achieved and report on them as such.

Using the *Getting to Outcomes* Guide as a framework, Gold and Simon helped groups develop a more formal articulation of their work. They helped groups delineate the elements of their theory of change by clarifying their strategies for building power, taking action, achieving educational wins, and transforming schools, communities, and individuals. In both workshops and follow-up coaching, Gold and Simon walked groups through the steps of: identifying indicators of progress; developing evaluation questions; and selecting assessment measures, data sources and collection methods.

PAYOFF

Participating groups used their enhanced understanding of evaluation to shape more sophisticated internal assessment processes, as well as to improve their proposals and reports. For example, Grow Your Own Illinois (GYO), a Chicago CPER grantee, utilized evaluation capacity assistance to formulate its application for a federal Department of Education Investing in Innovation grant, ultimately receiving high scores. GYO's evaluation plan remains a central part of this coalition's blueprint for scaling up its operations and impact.

RECOMMENDATIONS

Gold and Simon recommend that grantmakers:

- provide motivated grantees with evaluation coaches who can help them develop skills and organizational processes for self-evaluation;
- provide guidance on selecting and utilizing appropriate technologies and tools for data collection and analysis;
- coordinate with peer funders regarding expectations for data collection to minimize grantees' duplication of effort; and
- support grantees in developing meaningful evaluation infrastructures that meet their own organizational needs and serve them well over time.

Spotlight on building capacity for policy research and advocacy

NEED

Organizing groups cultivate buy-in for policy change by speaking passionately from personal experience and demonstrating public support for their position. To achieve policy wins, though, groups must also back up their arguments with sound research and analysis. As campaigns roll out, activists must also know how to navigate legislative and regulatory processes. Solid research and advocacy capacity boosts a group's chances of winning policy change and of shaping final policy language.

Unfortunately, few grassroots organizations can afford to employ lawyers or policy experts. When working within broad coalitions, groups may be able to draw on the expertise of allied legal advocacy groups, but getting access to these resources is not a sure thing. To acquire the advocacy strengths needed to secure policy reforms, then, organizations must develop these capacities internally, among their own staff and community leadership.

This imperative is largely consistent across different issues and sectors, but it is particularly important for education organizing groups. In recent years, education organizers have found themselves confronting a well-coordinated opposition that has spent millions of dollars (often within a single locality) to advance a policy agenda that is generally opposed by grassroots groups. To counter such well-funded campaigns, groups must present well-crafted policy alternatives grounded in solid research.

SUPPORTS

CPER drew on existing relationships to build grassroots advocacy capacity. Previously, grantees had worked with the Advancement Project on disciplinary policy reform, participating in Advancement Project "Action Camps" on the school to prison pipeline issue. When Jim Freeman, Advancement Project's senior attorney and Action Camp point person, left the organization to become an independent consultant, CPER and NEO Philanthropy partner the Just and Fair Schools Fund (JFSF) supported his continuing work with Padres y Jóvenes Unidos (PJU), an intergenerational community group in Denver, and Voices of Youth in Chicago Education (VOYCE), a coalition of youth-led groups. Freeman facilitated planning sessions, helped develop campaign strategies, conducted research, produced communications materials, and assisted with policy analysis, negotiations, and advocacy.

Freeman also collaborated with Youth United for Change (YUC), a Philadelphia-based grantee. When the School District of Philadelphia released plans to shutter 57 neighborhood schools, YUC used a CPER rapid-response grant to engage Freeman in helping groups research and author a community plan that provided strategic alternatives to school closings.

APPROACH

Committed to enabling transformative change, Freeman strives to help groups meet short-term needs while building their long-term capacity. He explains:

Ultimately, organizers' goals are not to secure a one-time or one-issue win, but rather to challenge entrenched and inequitable power structures and create broad systemic change. A key component of that is ensuring that capacity is built within the community through the organizing process and advocacy campaigns. Support organizations can play an important role in developing long-term capacity….For example, research…and policy advocacy can be designed to maximize community participation. Incorporating these strategies throughout a campaign is vital to helping people experience the policy change process and assume leadership roles within their community.

Freeman's fundamental orientation is toward building capacity rather than producing products. This developmental goal requires trust and sustained engagement. Freeman explains:

My goal is to be a "one-stop shop" for grassroots groups' advocacy needs, from the initial phases of a campaign (identifying the issue, obtaining and analyzing data, formulating demands, developing organizing, policy, and communications strategies) to the active advocacy phase (implementing multi-faceted strategies, drafting laws and policies, and negotiating with policymakers). Most contracted projects are part of long-term partnerships between myself and the grassroots partner.

PAYOFF

With Freeman's support, VOYCE built a statewide coalition powerful enough to win passage of discipline reform legislation in 2014. Illinois now requires all publicly funded schools to provide discipline data, and mandates that districts with high suspension and expulsion rates submit improvement plans. PJU in Colorado built on the Smart School Discipline Law (which it had helped win in 2012) by monitoring implementation and creating a statewide "school discipline report card." In Philadelphia, grassroots groups exerted sufficient pressure to force the School District to reduce the number of school closings by more than half. No further closings have been proposed since, and the district has advanced a school turnaround plan that draws on the community's recommendations.

RECOMMENDATIONS
Freeman recommends that grantmakers:

- confirm mutual interest in collaboration between grassroots groups and providers before moving forward;
- contract with capacity providers who envision their role as one of support rather than leadership;
- secure the buy-in and engagement of organizational leadership and front line staff; and
- provide mechanisms for grantees to build relationships with peer grassroots groups around the country.

Spotlight on building alliances to advance social justice movements

NEED

Low-income communities across the country face common challenges, including under-resourced and inadequate schools, increasing poverty and hunger, diminished affordable housing, and limited access to quality health care. Working independently, local groups stand little chance of shifting the federal policy and national discourse that drives much of what happens on the ground.

To advance social movements for opportunity and justice, capacity building must move beyond merely strengthening individual organizations. In addition, it must help groups build vital relationships, strengthen collaboration across issues and locales, and connect local experience to broader national debates that often ignore the very stakeholders whose voices must be heard.

SUPPORTS

CPER turned to the Annenberg Institute for School Reform (AISR) at Brown University, whose Community Organizing and Engagement staff brought extensive knowledge of school reform issues, research and policy expertise, longtime experience as community organizers, and existing relationships with many of CPER's grantees.

To deepen grantees' knowledge about education reform issues and connect campaigns on these issues across CPER sites, AISR facilitated peer learning communities across the country, convening participants for work sessions, and providing research and analysis to support participants' campaigns. For example, in facilitating a peer learning community on charter school accountability, AISR consultant Leigh Dingerson compiled briefing sheets on state charter school laws; helped groups develop state-based charter accountability strategies; and authored a report proposing accountability standards to ensure charter school transparency, equity, and access. These collective materials helped grassroots groups identify specific, local demands while coordinating a national effort to increase charter accountability.

Concurrently, AISR supported emerging coalitions of grassroots groups. For example, AISR staff helped members of the Journey for Justice Alliance fight for sustainable school transformation, supporting groups in developing this nascent national coalition's infrastructure and strategic plan. CPER also engaged AISR to support a regional coalition (the Philadelphia Coalition Advocating for Public Schools, or PCAPS), by providing issue expertise, national contacts, and facilitation for PCAPS' community schools campaign.

APPROACH

Grounded in respect for the power of community organizing, AISR seeks to connect organizing groups to relevant research, national debates, and peer groups across the country. In facilitating new coalitions, for example, AISR helps groups move from identification of shared goals to an effective common strategy. Dingerson explains: "Often, external facilitation is the best way to keep fledgling coalitions together. It takes an unbiased ear and strong facilitation skills to keep groups at the table and to make sure all interests are being served." By working with grassroots groups in multiple states while maintaining a presence in national education policy circles, AISR is able to provide high altitude analysis and connective framing across campaigns, policy levels, and sites. This orientation strengthens movement building, helping to place local work in national context while ensuring that national work reflects local realities.

AISR also bridges the worlds of organizing and research by making research intelligible to organizing groups; shaping research to be of use in grassroots campaigns; empowering groups to use research strategically; and providing turnkey data and analysis. Flexibility and timeliness are critical. AISR's Dingerson explains:

One key to being effective partners to community organizing is the ability to take advantage of opportunities that arise unbidden, to build power and engage in a larger education justice debate. Often, these opportunities require rapid-response research, written materials, or strategy development when parents or youth have only a few days to step into the spotlight to demand that their voices be heard. For example, when the Journey for Justice Alliance planned an event in Washington to protest school closings, Annenberg staff conducted research and created fact sheets on school closings in six cities. These fact sheets were produced in just a couple weeks, and were used heavily during the event.

PAYOFF

AISR's strategy development, knowledge generation, and support for coalition building across geographies and networks has enabled critical work to move forward on the national level. For example, the Journey for Justice Alliance now operates with a clear strategic plan and dedicated funding, and is continuing to grow. The charter accountability learning community evolved into a working group that continues as a national campaign with participation well beyond the initial membership, undergirded by AISR's nationally released report on charter accountability standards.

RECOMMENDATIONS

Dingerson recommends that grantmakers:

- prioritize supports to strengthen connections among groups, while fostering individual organizational growth;
- tap providers who bring content and research skills as well as the credibility to build trusting, productive relationships with groups on the ground;
- be poised to jump in immediately with the necessary resources when campaign opportunities arise; and
- create neutral spaces for relationships to grow, and nourish these spaces with supplemental resources and skilled facilitation so groups can take advantage of opportunities for joint work.

Final Thoughts

Grantmakers have a pivotal role to play in helping to build the capacity of individual organizations and their larger fields of practice. Sustained, strategically delivered, supplemental capacity supports simultaneously help groups enhance their effectiveness and funders leverage their investments, thereby advancing a more cohesive and powerful movement for social change.

Reflecting on her own organization's growth, Executive Director Akua Jackson of Youth Together in California observed:

> *Our organizing capacity shifted tremendously over the course of being a CPER-supported group, allowing us to more fully engage the organizing strategy that Youth Together has honed over the last 16 years. Our membership has tripled and we have more success-fully integrated grassroots outreach tactics as a part of our work on our school sites. We have built a parent organizing component to our work by bringing on a parent organizer who has developed a cohort of parent leaders. Our youth have gained critical advocacy and campaign planning/execution skills. We have developed new political education toolkits and have begun to integrate social media tactics more into our organizing work. We are working more closely with organizing groups we hadn't worked with before. We have experimented with our communications work, learning both how to talk about our work overall in new ways as well as how to message our campaign issues more sharply. We are significantly stronger as an organization than we were at the beginning of our partnership with CPER.*

Acknowledgements

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to the capacity building support providers whose insights informed this report:

Amanda Cooper and Holly Minch are partners in the LightBox Collaborative. Together, they bring more than 30 years of communications experience through hands-on work with nonprofit and labor organizations, philanthropies, and social entrepreneurs. Past clients include such organizations as the Ms. Foundation for Women, Forward Together's Strong Families Initiative, Demos, Transgender Law Center, and the Ella Baker Center for Human Rights. Cooper and Minch are frequent speakers and bloggers on strategy, communications, and branding for social change organizations. Contact: info@lightboxcollaborative.com.

Leigh Dingerson is a consultant to the Annenberg Institute for School Reform (AISR) at Brown University and the author of numerous articles and reports on education trends and policy. Her work with AISR has included supporting parent and youth organizations in the areas of local, state, and federal education policy and helping to develop strategies and campaigns to support public school improvement. AISR's Community Organizing and Engagement program helps youth, parent, and community education organizing groups develop sufficient power to improve the quality of education in low-performing school districts through providing policy research, educational data analysis, training, facilitation, coordination, and strategy development services. For more information: http://annenberginstitute.org/community-organizing-engagement.

Marjorie Fine provides training, coaching, program, and organizational development services to grassroots groups across the country that are working on a broad range of social change issues. She is the former executive director of the North Star Fund as well as of the Unitarian Universalist Veatch Program at Shelter Rock. As director of the Linchpin Campaign, a project of the Center for Community Change, Fine interviewed and surveyed more than 200 donors to develop guidebooks for groups and funders to expand the resources for community organizing. Contact: marjoriefine1@gmail.com; (202) 302-6818.

Jim Freeman is the founder and executive director of Grassroots Action Support Team, which supports the efforts of low-income communities and communities of color to address systemic injustice and achieve large-scale, transformative social change. Through sustained partnerships with groups, Freeman's one-stop shop for meeting grassroots advocacy needs includes supporting campaign development, obtaining and analyzing data, developing organizing and policy strategies, drafting laws and policies, and negotiating with policymakers. Previously, Freeman served as a senior attorney with the Advancement Project. Contact: jfreeman@grassrootssupport.org; (202) 316-0959.

Eva Gold and Elaine Simon provide research and evaluation expertise to grassroots organizing and education advocacy groups across the country. Gold, a senior consultant with Pathway Strategies, previously co-founded and co-directed the nonprofit Research for Action. She has published widely, with a particular focus on the intersection of schools, communities, and families. Simon co-directs the Urban Studies Program at the University of Pennyslvania. A former senior researcher at Research for Action, Simon's research and publications focus on the intersection of communities and schools through the study of education policy and community organizing. Contact: evagold47@gmail.com; (215) 962-4884 or elaine.l.simon@gmail.com.

Special thanks also to **Leslie Ramyk,** CPER Capacity Building Program Coordinator, 2011-2012

Helpful resources

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About NEO Philanthropy

NEO Philanthropy is a leader in developing innovative philanthropic strategies and partnerships that marshal the collective resources of people passionate about driving positive social change. Launched in 1983 as Public Interest Projects, a 501(c)(3) public charity, NEO brings together diverse organizations driving cutting-edge social change work, resulting in a movement for equality, fairness, and a stronger participatory democracy.

Building Capacity to Sustain Social Movements is one of several reports CPER prepared to share lessons learned about Fund impacts and effective grantmaking strategies. It can be downloaded at www.neophilanthropy.org, along with the following complementary reports:

Greater Power, Lasting Impact: Effective Grantmaker Strategies from the Communities for Public Education Reform Fund
Addresses the value of community organizing for education reform and strategies pursued to support growth in individual civic capacity, community social capital, and policy change.

Education Policy Impacts 2007-2014
Summarizes key policy wins at the school, district, state and federal level achieved through multi-year campaigns led by CPER grantees.

Strengthening Collaborations to Build Social Movements: Ten Lessons from the Communities for Public Education Reform Fund
Explores effective grantmaker strategies to nurture collaboration between field advocates and allies in order to advance social justice movements.