tcc group

The California Endowment
Advocacy General Operating Support Evaluation:

Summary of Expert Interview Findings

June 28, 2006

INTRODUCTION

This memo summarizes TCC's recent interview findings with selected policy advocacy experts (such as funders, researchers, consultants and practitioners) as well as a literature review of recent research. Drawing from its own work in organizational development and organizational effectiveness, TCC probed experts around four capacities TCC has found to be central to organizational effectiveness (leadership, adaptive, management and technical). The primary purpose of the research was to understand how the framework applies specifically to effective advocacy organizations. Both the literature review and expert interviews were intended to inform the development and refinement of a logic model for the California Endowment's General Operating Support Grant program in order to conduct an evaluation of the impact of the program.

Specifically, leadership capacity refers to the ability of organizational leaders to create and sustain the vision, inspire, model, prioritize, make decisions, provide direction and innovate, all in an effort to achieve the organizational mission. Adaptive capacity refers to the ability of a nonprofit organization to monitor, assess and respond to internal and external changes. Management capacity refers to the ability of nonprofit organization to ensure the effective and efficient use of organizational resources. Technical capacity refers to the ability of a nonprofit organization to implement all of the key organizational and programmatic functions. We also included organizational culture as a component of the assessment since it has a significant impact on each of the above core capacities. Each organization has a unique history, language, organizational structure, and set of values and beliefs. These cultural elements all serve as the context through which organizations define, assess and improve their effectiveness.

As suggested by the Foundation staff, TCC also drew from important findings from a recent publication by the Alliance for Justice (AFJ), "Building Your Advocacy Grantmaking, Advocacy Evaluation Tool and Advocacy Capacity Assessment Tool," in this analysis. Specifically, the advocacy capacity assessment tool is organized around nine broad indicators of capacity: decision-making structures, advocacy agenda, organizational commitment to and resources for advocacy, advocacy base, advocacy partners, advocacy targets, media skills and infrastructure, advocacy strategies, and knowledge, skills, and systems to effectively implement strategies. The AFJ capacity tool does an excellent job outlining these areas and identifying specific indicators of capacity. For the most part, TCC would categorize the capacities in the AFJ assessment as technical capacities required to effectively do advocacy, while addressing to a lesser extent other capacities, such as leadership. This memo serves to highlight TCC's efforts to further round out organizational characteristics of highly effective advocacy organizations and highlights where there is crossover with AFJ's framework.

FINDINGS

Organizational Characteristics
Experts were quick to acknowledge varying types of advocacy work, specifically organizations engaged more on the public policy side and those working more at the grassroots level trying to change community perceptions. Others also noted distinctions between organizations that work on multiple issues and those working on a single issue. The AFJ report also described various types of advocacy based on branch of government or the electoral process: administrative

advocacy, legislative advocacy, nonpartisan election-related advocacy, and legal advocacy.[1] Additionally, some organizations conduct advocacy campaigns to affect changes at all levels (federal, state and local) while others only work at either the state or local level. **While specific technical skill sets vary based on the type of advocacy work, overall experts seemed to indicate that basic organizational characteristics did not vary.** There were five characteristics that generally defined effective advocacy organizations:

- **Visibility of the organization and the issue.** Organizations need to consider both their name outreach and how well their issue is highlighted. Effective organizations had high name recognition and were considered to be credible with the public (credibility criteria are discussed below). In addition, organizations had a high degree of visibility on the particular issue.

- **Media savvy is critical to moving the issue forward.** Organizations need to be what one expert called "mediagenic." Being able to have connections with the press and frame issues that the press will act on is a very important technical skill even for grassroots advocacy. Having a broad-based connection in terms of grassroots is important, but in terms of really moving things forward the media becomes critical. Similarly, the AFJ report also argued that organizations should communicate effectively and systematically with and through the media to publicize and advance its advocacy positions and messages. However, experts noted a distinction between local issues and state/national issues, indicating that the more local the issue, the more important the base mobilization in comparison to media outreach.

- **Building and maintaining "working relationships" with advocacy targets.** Both the AFJ report and a number of experts highlighted the importance of identifying, building and maintaining working relationships with advocacy targets, such as legislators and their staff. Having a genuine working relationship will allow organizations to productively engage key staff members of the legislative branch or executive branch in policy-related discussions.

- **Creativity and using a variety of tools.** Successful organizations utilize more than one type of outreach tool (websites, newsletters, word of mouth, white papers, etc.). This also included knowing when and how to utilize a variety of action tools (direct action, reports, agendas, bills, etc.).

- **Highly credible relationship to issue and constituency.** Questions that emerged from experts that are important for advocacy organizations to ask themselves included: What are the links between the advocacy organizations and the resident constituencies? What is the composition of the advocacy team? Where are the offices? Are they respectful of the way they gather information on the issues for which they advocate? Several items emerged as important to promoting credibility:
  - All of the experts seemed to agree that the organization leaders had to be able to relate to a broad constituency. This was less about having an exact demographic match and more about **staying power** and being able to **convey issue information in an understandable way**.

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[1] Administrative advocacy refers to activities that influence the development of regulations, executive orders, and other executive branch policy vehicles, as well as enforcement of the law. Legislative advocacy refers to activities that influence decisions made by the legislative branch, including lobbying activities as defined by federal, state, and local laws. Nonpartisan election-related advocacy refers to nonpartisan participation in the electoral process, such as activities that encourage voting and educate voters and candidates. Legal advocacy refers to activities that use the judicial branch to influence policy through litigation.

- It is also important that an organization has a credible spokesperson. Does the particular timing or sensitivity of the issue require someone with a different background, language ability, ethnicity, race, etc.? Is that leader/person the right face to have media broadcast?
- To be credible you need to stand firm for something. Organizations that knew when to stand up and call others' bluff are often seen as more credible. However, this must be balanced with not being perceived as combative.
- The source of an organization's funding could compromise its credibility.
- The other caution was the use of information that highlighted the issue in a credible organization. "My own experience is that when you are dealing with facts, the most conservative fact is still shocking to the public. When you use the most shocking fact people get into a debate about the relative seriousness of the issue. So, don't overreach with the facts that you have."

Leadership
Leadership capacity refers to the ability of organizational leaders to create and sustain the vision, inspire, model, prioritize, make decisions, provide direction and innovate, all in an effort to achieve the organizational mission. The AFJ report stated that the organization needs to have a clearly defined agenda in place to guide advocacy activities. Several areas emerged in organizational leadership for advocacy organizations:

- **Leaders need to have clear vision and be able to articulate that vision.** Leaders need to be able to stay focused on what they are trying to achieve, even as they employ diverse strategies. The vision should be understood by all stakeholders, such as board, staff, funders and clients. Experts noted the importance of distinguishing between the vision and tactics, but added that they should not ever be in conflict (meaning, a tactic should not be used if it is antithetical to the vision).

- **Leaders need to be strategic about how to accomplish the vision.** They need to be able to present a coherent plan for how to achieve their vision, with clear goals and objectives that are understood both internally and externally. This includes talking in concrete terms with real proposed solutions.
    - Leaders should identify specific advocacy targets (e.g., public, media, policymakers, etc.) and develop specific strategies and policy action plans aligned with specific targets accordingly.
    - At least some goals and objectives need to be achievable in the short-term. Good leaders set outcomes/victories in ways that build, empower and encourage their constituency. This is done through:
        - Effective framing of the issue AND framing of expectations.
        - Grasping "low-hanging fruit"—victories that are easy, and perhaps even obviously going to be achieved.
        - Frame failures as platforms for the next step, though avoid claiming success where it is clearly not, as this ruins credibility.
    - Leaders should be able to articulate a variety of creative approaches and provide a rationale for when they are using them. For example, sometimes it is optimal to collaborate, whereas at other times it may be best to go it alone.
    - As indicated in AFJ's findings, leaders should develop appropriate strategies based on analysis of the policy environment, their organizations' capacity and resources, and the potential for support from other advocates.
    - The goals and objectives should be flexible. One expert noted, "I can't tell you how many organizations have failed because they are inflexible in their approach.

Sometimes having a single mode approach is not the most effective." However, experts cautioned that flexibility is not an excuse for being undisciplined.
- o Leaders should develop a plan to measure progress toward goals, such as having clear benchmarks and indicators to track progress.
- o Leaders should not take on fights that will frustrate their constituency. "You don't want to make the people you are advocating for feel hopeless."

- **Leaders need to have wide appeal.** Leaders should be strong and credible enough to speak to the powerful and the powerless. Experts noted that good leaders are able to be at the table with a wide range of people and maintain an ability to disagree without causing rancor.
  - o Having a respect for the cultures involved in the issue is important. This includes the base, collaborative partners and influencers.
  - o It is important to be able to speak an understandable "language." In the most literal sense, this means that people have to understand the actual language being spoken by both constituents and policy makers. However, this also includes avoiding jargon, as well as knowing and relating to an audience.
  - o Good leaders are affable and be able to work with a wide range of individuals and organizations.

- **Ability to inspire and keep people engaged over time.** This was considered one of the more important traits. Recognizing that there is a window of opportunity that may or may not be open in the immediate time period, leaders need to keep the constituency engaged until the right opportunity emerges. Some specific items included:
  - o Clearly communicate to boards and constituents the complexity of the issue and the concrete steps to get there.
  - o Unpack incremental steps in order to make things less complex for people to understand, and set measurable results.
  - o Combine both policy advocacy and grassroots advocacy over the life of the project rather than trying to merge later in the work.
  - o Genuinely thanking the constituency and partners on a regular basis for their help in incremental steps.
  - o Don't get burrowed into failure. Keep a healthy perspective.

- **Seek out other points of view, take advice and be willing to change your mind.** While all of the experts said that ultimately someone had to be the final decision maker (indicating the decision by committee is generally not the most effective in an organization), they did highlight the importance of formal mechanisms for hearing multiple viewpoints. It is particularly important for leaders to hear from those who are on the "front lines" (i.e., interacting with key individuals or groups) as well as constituents who will be affected by advocacy outcomes.

- **Is reflective of own leadership style, practice and performance.** Leaders need to be conscious of their own credibility (or lack thereof). This self-reflection is a leadership capacity, but often requires more formal organizational adaptive capacity in order to get the full data a leader needs to be truly reflective.

- **Engages the board.** The organizational leader needs to be able to clearly communicate with the board and is responsible for the board's level of engagement. This includes solid

recruiting for the board and making sure the board has clear roles and responsibilities and shares in successes.

- **Has leadership authenticity and knows when to let others lead.** The leader needs to be perceived to be "walking the talk" by both staff and those external to the organization. Some aspects of this suggested by the experts include:
    - o Constantly assessing his/her credibility.
    - o Being conscious of who should have the limelight at any given time in order to best advance the issue.
    - o Being seen as committed to the community the issue purports to affect. This could be living in the community, having been around for a long time, speaking a common language, etc.
    - o Making sure the vision of the organization is about an issue, not the leader.

- **Good leaders also need to be good managers in advocacy organizations.** What this looks like is discussed in the management section.

Board Leadership
The experts stressed that high performing organizations need an actively engaged board that is committed to and understands advocacy. The composition of the board should include people who have been involved in policymaking and implementation and who understand how it works and can educate others. The experts discussed how boards need to understand that advocacy puts them in the public eye, and that this will likely put them in conflict with people. As a result, it is important for boards, regardless of their level of engagement, to be mentally and emotionally prepared for advocacy. Six specific issues for board emerged:

- **It is important for boards to focus on the mission of the organization.**

- **Boards should have a clear role in the advocacy effort.**

- **Boards need help understanding how to check the direction of the organization in an advocacy effort**—e.g., understanding indicators—and how to keep advocacy efforts aligned with the organizational mission. This is particularly important for organizations that do multiple-issue advocacy.

- **Highly effective advocacy boards are engaged publicly on the issue and are made to feel involved and included in "wins."** However, it was acknowledged that the more technical the tactics/strategies of the advocacy organization, the more difficult it is to have an engaged board.

- **Boards need to have a long-term orientation and understand that it is okay to be unsuccessful on campaigns, or to have wins postponed.**

- **Boards should not micro-manage the day-to-day activities of the organization.**

Adaptability
Aside from leadership capacity, perhaps the most important characteristic is adaptive capacity. Adaptive capacity refers to the ability of a nonprofit organization to monitor, assess and respond to internal and external changes. Advocacy organizations need to be highly adaptable in order to be effective in ever-changing environments over the long run. Inherent in many of the

leadership issues discussed above is the flexibility and adaptability of the organization. Organizations need to revisit and adjust their strategies and tactics when opportunity or threat arises in a fluid policy environment. Experts highlighted several specific areas of adaptability important for advocacy organizations:

- **Regularly review and refine the policy agenda.**   A primary component of adaptability outlined in the AFJ Report, the policy agenda—goals, objectives and strategies—should be regularly reviewed and refined in response to new opportunities or threats as they arise   An advocacy agenda should have contingency plans (e.g., a decision-tree, if A happens will do B, if A doesn't happen will do C).

- **Develop an ongoing system and/or process for documenting and monitoring changes in a fluid policy environment**. Before organizations can react to changes in the external policy environment, they need to have a good understanding of the emerging issues and their surrounding contexts.

- **Reflect on successes and failures.** After every initiative or milestone, and sometimes in between, it is important for organizations to step back and ask, "Why did it succeed or fail?"

- **Create a plan from reflection.** While experts noted that many advocates were taking time to ask the "why" question, it is even more important for organizations to actually take the "why" question and turn it into a formal working blueprint for the future.

- **Formal metrics form the basis for successful adaptation.** Organizations that don't have solid metrics often find themselves "blowing in the wind."

- **Adaptability requires funding flexibility.** Organizations should have a range of funding sources so that they are not perceived to be unduly influenced by any one funder. This is also an important aspect of management, as discussed below.

- **Take time for stability.** While policy change is often characterized as a slow-moving process, those in the field often feel like they never stop running. Experts recommended a couple of things regarding stability as a way to improve adaptability:
    o   Take time to reflect and plan on the future. Retreats, planning sessions and so forth are generally found to be well worth the time even given competing demands.
    o   Celebrate victories, even the small ones. One expert said, "Good advocacy organizations understand that it is an ongoing process. They push and get as far as they can get and then having achieved that, they say, let's shake hands and celebrate. Then they start the next day and see how far they can get." Such pauses for celebration allow constituents to rest and remain engaged, as well as allow the dust to settle so that an effective new direction can be developed.

Management
Management capacity refers to the ability of nonprofit organizations to ensure the effective and efficient use of organizational resources. Management in advocacy organizations includes those basic tenets of all organizations: good communication, good people, good resource management, etc. One of the issues that appeared most distinct for advocacy organizations, however, is that good management is about running an authentic organization—one where staff are committed, engaged and believe in the work of the organization. Some of the specific management areas are discussed below:

- **Having resources available when the window of opportunity opens.** Experts discussed having relationships with funders that could be quickly capitalized on, or having ongoing flexible funding that can be shifted as needed. It was recommended that funding around short-term objectives might be a way to help organizations break down their visions into concrete action steps.

- **Staff need clear and meaningful tasks delegated to them, and then to be given the decision-making "space" to achieve those tasks.** One important mechanism for this is having clear job descriptions. However, the culture of advocacy organizations and the nature of the work require fluidity. Staff should be empowered to make high-level decisions given the quick pace of policy change.

- **It is important to recruit individuals who:**
  - Can effectively engage the relevant constituency.
  - Have the skills necessary to do the job.
  - Are adequately compensated.
  - Are interested in the issue.

- **Knowledge needs to be managed and facilitated between staff.** Experts noted that knowledge management was an area where organizations needed help. It was considered an important part of an organization for two reasons. First, it ensured that staff members were sharing relevant information that made them more effective in their work. Second, transfer of knowledge was considered an efficiency bottleneck, both in terms of time wasted reinventing the wheel and the difficulty of bringing people up to speed on projects, particularly new staff. Organizations should develop structured opportunities to share learning, e.g., reflective sessions, internal memos, etc.

- **Staff need to be evaluated on a regular basis.** Experts noted a couple of elements of effective staff evaluation:
  - Performance metrics are clearly outlined. While the experts noted that advocacy organizations have drawn from nonprofit HR policies, they often remain unclear about setting such metrics within their organizations.
  - Evaluation should happen both at regular intervals as well as immediately following large task completion. From these evaluations, a clear staff development plan should be created.

- **Management needs to develop training plans for supplementing skill gaps and building staff capacity.** Management should invest in staff development related to building advocacy skills in the areas of research, policy analysis, communications, community organizing and lobbying. This is discussed in detail in the AFJ report.

- **Having multiple people with similar job descriptions varies in effectiveness according to the size of the organization.** For smaller organizations, having someone who can do two or three jobs is an important way to make sure work gets done in a fluid context. This is particularly true for support staff. However, as the specialization level increases, redundancy becomes inefficient. **Experts recommended that organizational leaders should consider carefully combining multiple job descriptions into one and the reality of one single staff member being able to accomplish all of the roles.**

- **Committed to diversity and shared languages.** Organizations should be sensitive about languages, backgrounds and disciplines of staff in internal communications. Specifically, they should develop shared language that is grounded in common values, beliefs and politics.

Networks
Experts noted that networks were an important way for advocacy organizations both to advance their agenda through broader support and, more importantly, to fill in capacity or strategy gaps that another organization could fill more effectively. In particular, experts believed it is important for advocacy organizations to develop and maintain network/connections with:
  o Media outlets/reporters.
  o Legislators, legislative aides, and other policymakers.
  o Complimentary organizations (e.g., research, grassroots mobilization, etc.).
  o Policy implementers (e.g., government agencies, etc.).
  o Unlikely or non-traditional allies, such as organizations across issues, sectors and political lines.

As the AFJ report noted, the networks can motivate, prepare and quickly mobilize in support of its advocacy activities. It facilitates the "turn-out ability" of the organizations, i.e., ability to get people to show up, through partnerships and networks. Through the network, it also opens communication channels with the constituency: the organization should have some way to hear from those being affected by issues, so that they can ensure that strategies and tactics are reflective of their needs.

Six key themes emerged regarding networks:

- **Use networks to fill critical gaps and leverage resources.** A number of experts even noted that the historical division between grassroots advocacy and policy advocacy often caused problems and that those organizations that were highly effective were those that could operate in multiple context and who formed strategic partnerships to complement their skill sets.

- **Utilize established networks.** Experts noted the difficulty of forging new networks for every issue or advocacy need, and indicated that such an approach should be the exception rather than the rule. Rather, effective advocacy organizations effectively identified established networks whose interests were compatible, though not necessarily identical.

- **Understand how your issue fits into a broader network of issues.** Organizations need to think beyond the blinders of their own issue in order to build successful partnerships. This understanding increases the likelihood of an organization being able to identify an existing network to tap into.

- **Understand what your organization's niche/contribution is.** Organizations need to be able to clearly articulate where they bring value added to a partnership. This comes from thinking about your true strengths. Ultimately it is about having a clear idea of an organization's strategic place within a larger issue.

- **Networks need to be built with key decision-makers at the table.** While division of labor within organizations is important, strong networks need to have good relationships in senior leadership.

- **Validate your network.** This is as simple as taking the time to formally give thanks, jointly celebrate in successes, and so forth. It is important to continually acknowledge what others in your network bring to the table.

<u>Technical Skills</u>
Technical capacity refers to the ability of a nonprofit organization to implement all of the key organizational and programmatic functions. The AFJ report highlights that for each advocacy strategy, the organization should have staff who are knowledgeable about the process and have the skills and experience necessary to effectively implement the strategy. For instance, staff should have skills in research, policy analysis, budget analysis, communications, lobbying and community organizing.

Some of the important elements of technical capacity that were raised by experts include:

- **Organizations need to have an understanding of how policy change happens, i.e. both technical aspects (how a bill becomes a law) and practical aspects (politics, alliances, etc.).**
    - o Should be able to map the landscape of players.
    - o Need to understand rules governing advocacy.
    - o Need to understand where their issue is on the policy agenda.

- **Organizations should have a problem defined "properly," and should not have a solution in the problem definition.**

- **Organizations need a communications plan and dedicated resources.**
    - o Staff have communications training.
    - o Clearly defined communications strategy.
    - o However, not all strategies require intensive media components (e.g., litigation, more technical work around shaping a bill, etc.).

- **Organizations do not need to have capacity in every technical area of advocacy (e.g., legislative, legal, etc.), but need to recognize strengths and limitations, and have a strategy for acquiring these capacities (through partnerships, consultants, etc.).**

- **Technically, make sure your organization ALWAYS gets the facts right and presents respectful statistics** (i.e. don't exaggerate or use numbers at the top of a range, even if the range is based on careful analysis).

<u>Organization Culture</u>
We also interviewed experts about the organizational culture of successful advocacy organizations. Each organization has a unique history, language, organizational structure, and set of values and beliefs. These cultural elements all serve as the context through which organizations define, assess and improve their effectiveness. In general, experts identified the following elements about the culture of successful organizations:

- **Celebrate success**
    - o Leaders should always look for opportunities to give credit to staff for their efforts (since financial rewards are very limited).
    - o Retreats, birthday celebrations and diversity training are important.

- **Have a culture that embraces its constituency.** Highly effective organizations were reported to clearly demonstrate that they care for their primary constituency. Experts noted that organizations that are involved in the issue for the issue's sake, rather than for the people the issue affects are less successful. They are perceived as being phony and not truly having the best interest of people in mind.

- **Promotes a team-working environment**
    - Open and transparent.
    - Respect multiple viewpoints.
    - Culture of caring and sensitivity.
    - Creativity, collegiality, and team work.
    - Avoids office politics or unnecessary backstabbing.

CONCLUSION

The background research and interviews with experts in the field of advocacy provided valuable insight into how effective advocacy organizations operate. Specifically, the information has informed the specific make-up of four core organizational capacities as they relate specifically to advocacy organizations. This information will inform a next revision of the logic model developed for the evaluation of the general operating support grant program, and will further be used to develop specific indicators and tools toward evaluating the effectiveness of the program.

Interview List

Patrick Babcock, Acting Vice President, The Kellogg Foundation

Clint Bolick, President and General Counsel, Alliance for School Choice

Ruth Brousseau, Director of Evaluation and Organizational Learning, The California Wellness Foundation

Emmett Carson, President and CEO, The Minneapolis Foundation

Elizabeth Heagy, President, Center for Lobbying in the Public Interest

Netti Hoag, Deputy Commissioner, California Department of Insurance

Susan Hoechstetter, Foundation Advocacy Director, Alliance for Justice

Ruth Holton-Hodson, Director of Public Policy, The California Wellness Foundation

Andrew McGuire, Executive Director, Health Care for All

Ricardo Millett, Consultant and former President of the Woods Fund of Chicago

Frank J. Omowale Satterwhite, President, National Community Development Institute

Harry Snyder, Independent Consultant

Makani Themba-Nixon, Executive Director, The Praxis Project

Annotated Bibliography

Alliance for Justice. "Building Your Advocacy Grantmaking, Advocacy Evaluation Tool and
     Advocacy Capacity Assessment Tool." 2005.
The advocacy capacity assessment tool is organized around nine broad indicators of capacity:
decision-making structures, advocacy agenda, organizational commitment to and resources for
advocacy, advocacy base, advocacy partners, advocacy targets, media skills and infrastructure,
advocacy strategies, and knowledge, skills, and systems to effectively implement strategies.

Boney, Ret. "Barriers to Policy Engagement: Part 1." www.philanthropyjournal.org, March 13,
     2006.
Boney, Ret. "Barriers to Policy Engagement: Part 2." www.philanthropyjournal.org, March 23,
     2006.
These two articles explore aspects that can inhibit organizations from engaging in policy. A
couple of the highlights were that having flexibile funding is important and the importance of
being a leader in the issue area, not just by policy makers and beyond just one narrow policy
idea. He also advocates for the strategic use of boards, including some advocacy training and
the benefit of working within pres-established networks.

Chapman, Jennifer and Amboka Wameyo. "Monitoring and Evaluating Advocacy: A Scoping
     Study." Prepared for ActionAid, with funding from the UK Department of International
     Development (DFID) and Comic Relief. 2001.
This article explored various frameworks for conducting evaluation for advocacy work, and
pointed to the importance of monitoring process as well as outcomes. However, it focuses more
on evaluating outcomes than on frameworks for understanding the organization. The authors
significantly downplayed the concept of "taking credit" for change, insisting that promoting a
collaborative win is more effective in the long run. The article made it clear that frameworks
should not be seen as straitjackets, but as "tools for facilitating creative thinking." This is
probably worth highlighting in the introduction to the report.

The article also emphasized reflection is an important part of making tacit knowledge more
explicit. Further, it indicated that pre-set yardsticks may not be the best way to measure
success. However, they also indicate that the goals of the policy work need to be long-term to
include not only policy change, but monitoring of implementation. Finally, they do emphasize
that an initial theory of change is important, with the recognition that this will likely change over
time.

Church, Madeline, et. al. "Participation, Relationships and Dynamic Change: New Thinking on
     Evaluating the Work of International Networks." Working Paper No.121, University
     College of London, 2003.
This paper helped explore elements of collaboration and partnership. The article outlines a few
key areas of networks, including establishing trust; coordinated structure and representative
committee as a minimum, with less structured networks requiring greater trust; fairly uniform
participation, best accomplished through clarity of purpose; and continuous monitoring of the
network. This article, like the Chapman and Wameyo article, says, "Attempts to disaggregate
the 'impact' of the work of the individual members, and that of the network in a
lobbying/advocacy environment misses the point."

Cohen, David and Rosa de la Vega and Gabrielle Watson. "Advocacy for Social Justice: A
     Global Action and Reflection Guide." Kumarian Press, Inc. 2001.

This is a large guide that covers various elements of the advocacy environment. Particularly relevant chapters included: Lesson 9, Learning organizations; Lesson 10, Effective leadership; and Lesson 11, Well-rounded teams. Section II of the guide outlines the building blocks of a successful campaign, including skill building in various areas.

Dessein, Wouter and Tano Santos. "Adaptive Organizations." January 26, 2006 Draft Paper
        Version. Available at:
        http://gsbwww.uchicago.edu/fac/wouter.dessein/research/dessein-santos.pdf.
This paper helped explore elements of adaptive capacity and what they look like structurally. The paper highlights specifically the role of communication vis a vis organizational size and specialization.

Egbert, Marcia and Susan Hoechstetter. "Mission Possible: Evaluating Advocacy Grants."
        Foundation News and Commentary, January/February 2006. Vol. 46, No.1.

Foss, Nicolai J and Keld Laursen and Torben Pederson. "Organizing to Gain from User
        Interaction: The Role of Organizational Practices for Absorptive and Innovative
        Capacities." First draft, paper prepared for the workshop "Organizing the Search for
        Technological Innovation", held at Copenhagen Business School, 2005.
This paper looks at how intra-firm knowledge transfer and sharing leads to increased innovation. A major finding includes, "Although weakly tied project teams have an advantage in terms of their search ability, such teams have a problem transferring highly complex knowledge, because they are likely to incur transfer problems due to poor interaction with the source unit."

Heckman, Frank. "Instead of Constantly Trying to Adapt to Change…Why Not Change to Being
        Adaptive?: The Participative Design Approach." www.worldtrans.org/qual/workplac.html
        on March, 10, 2006. Copywrite 1995.
The brief article lays out three structural design issues, including coherency and focus of the organization, flexibility of the organization and how challenged and motivated staff are to do excellent work. In order to do this, the author recommends both redundancy of parts and redundancy of function.

National Committee for Responsive Philanthropy. "Not All Grants Are Created Equal: Why
        Nonprofits Need General Operating Support from Foundations." September 2005.
The paper lays out arguments in support of and against general operating support from foundations. Some foundations oppose giving general support grants to their grantees because it poses challenges in evaluating the outcome of the grant, fosters too much dependency on the grantees, and discourages competition and innovation among nonprofits since general operating support often only strengthens projects and organizations that already exists. On the other hand, other foundations argued that evaluation of general support grants should be conducted using a qualitative perspective and over the long run. They also felt that any grantee can become too dependent upon a foundation, whether they receive general or project-specific support. In terms of the competition and innovation arguments, these foundations believed nonprofits should be allowed to determine their own program agendas and not have to create new projects to keep funders interested.

The paper also cited NCRP's previous research on conservative advocacy strategies presented in *Axis of Ideology*. That report revealed two important findings regarding core support and funder control: (1) conservative advocacy organizations receive a higher percentage of core operating resources than their counterparts and (2) these organizations also seem to have funders that are more involved in the overall governance of the organizations they support.

Stead, Martine and Gerard Hastings and Douglas Eadie. "The Challenge of Evaluating Complex Interventions: A Framework for Evaluating Media Advocacy." Health Education Research, Theory & Practice. Vol. 17, no.3 2002. pages 351-364. Oxford University Press.