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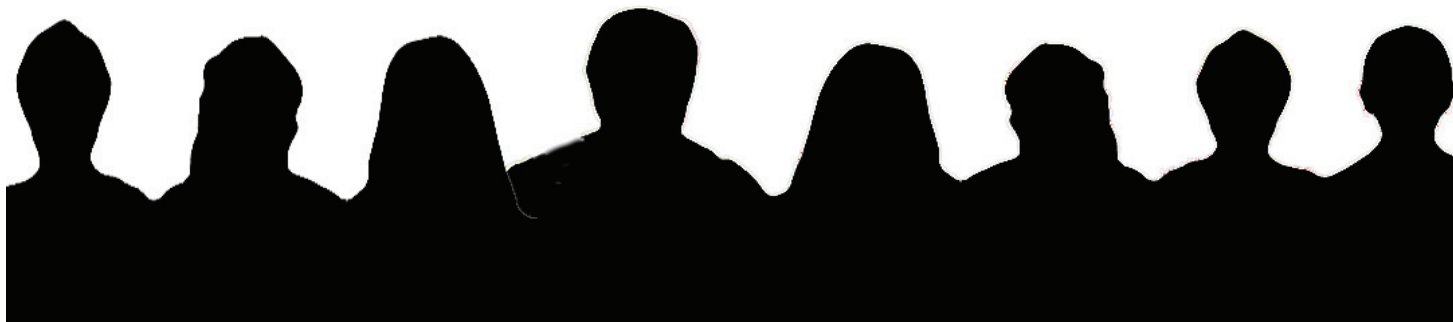
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“CHRONICLES OF CHANGE”

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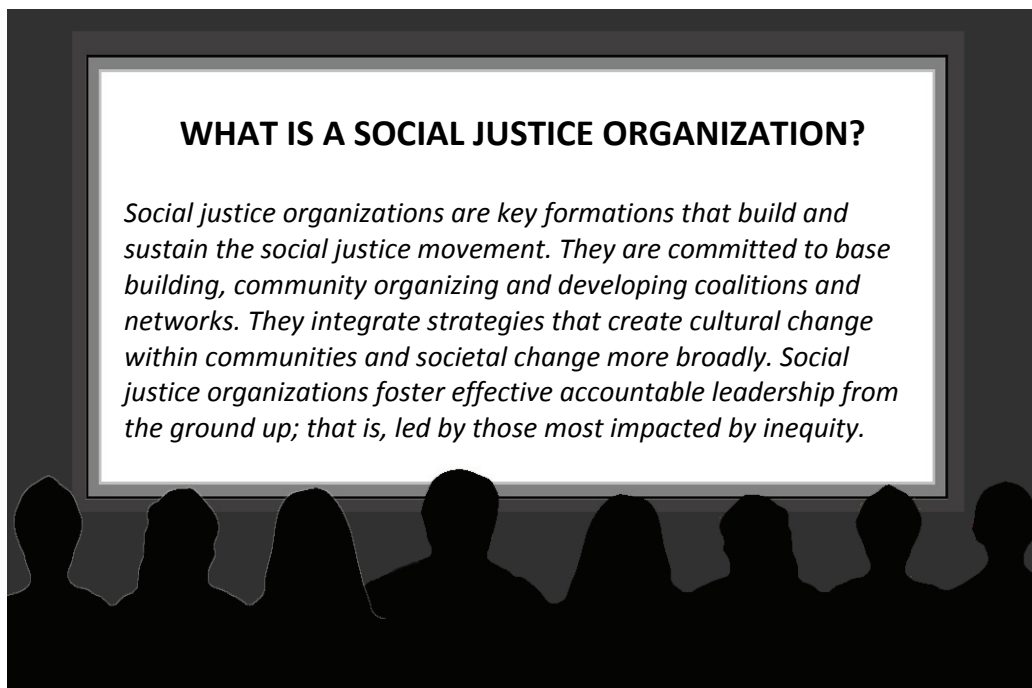
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I. INTRODUCTION

The National Gender and Equity Campaign (NGEC) believes that all social justice organizations are drivers of change and delivery agents of solutions in the social justice movement. As such, each should have a Theory of Social Change (TOSC) to be most effective and sustainable.

As part of the journey in the Organizational Fellowship Program (OFP), we believe that each group can achieve organizational transformation if they invest the time and effort to create a theory of social change. This guide suggests a process and specific activities that help achieve the product of a TOSC for groups. We believe that the combination of both the process and product makes a TOSC critical to organizational transformation.



WHAT IS A THEORY OF SOCIAL CHANGE (TOSC)?

Simply put, a Theory of Social Change (TOSC) is your organization's story—explaining how your organization understands, plans, and acts to build a better world. These components are often referred to as your assumptions, analysis, strategies, values and vision. From an organizational process standpoint, a Theory of Social Change generally follows the creation of organizational vision, mission, and values statements, and precedes the creation of a strategic plan.

A Theory of Social Change connects back to NGECE's larger framework of the *Anatomy of Social Justice Organizations*, and is a part of the articulation of an organization's identity (heart). To develop a TOSC, an organization has to also consider the other anatomy areas because they are integrally linked to having a Theory of Social Change. We have framed the TOSC process into 4 distinct areas, which we are calling the **"story elements"** of a Theory of Social Change.



"THEME"
Organizational
Vision & Values



"PLOT"
Organizational
Goals & Outcomes



"CHARACTERS"
Organizational
Stakeholders



"ACTION SEQUENCES"
Organizational
Analysis & Strategies

Once an organization has these 4 story elements, your organization's TOSC reflects its **"role in the social justice movement."**

An organization's TOSC is a reflection of how a larger vision will be accomplished over time through the achievement of goals that are informed by a clear sense of what the organization is trying to change and why. It is the NGECE's perspective that if organizations dedicate themselves to surfacing the assumptions that inform decision-making about strategy, programs, coalition work, etc., this process will yield greater consciousness amongst organizational stakeholders and a more strategic organization overall.

WHY A THEORY OF SOCIAL CHANGE?

NGECE strives to support organizations to become stronger and sustainable social justice organizations by offering a framework and suggested exercises designed to facilitate your organization's ability to:

- ★ **Articulate your community's experiences, perceptions of current problems, and future possibilities,**
- ★ **Surface existing community and organizational assets,**
- ★ **Build thinking and understanding for all those involved in your organization's work,**
- ★ **Describe your approach to making change happen,**
- ★ **Describe your intentions and aims,**
- ★ **Ask good questions in order to adjust your organization's role and work based on the context and environment you are operating in, and**
- ★ **Share your organization's impact and progress towards building a better world.**

As a product, your organization's TOSC tells your organization's **story**—past, present and future. As a process, your organization's TOSC represents the culmination of multiple processes informed by your organizational stakeholders.

These include your analysis of **WHY** focus on particular targets, **HOW** your organization will make change, and to specifically make transparent the assumptions that your organization has made about its work.

Ultimately, a TOSC serves to answer the question, “**What is your organization's role in the social justice movement?**”

This guide will support you in identifying the assets your organization has in relationship to a TOSC, as well as, to help you engage the various organizational stakeholders in a process of reflection and definition of your TOSC.

Furthermore, this guide was designed to support organizations along a continuum of capacity by suggesting exercises that can be applied to varying degrees of depth—serving the function of assisting organizations in creating each element or reevaluating an element to deepen your practice.

WHAT IS THE ROLE OF A THEORY OF SOCIAL CHANGE IN AN ORGANIZATION?

Implied by the word “theory” is the notion that in order for your organization to address root causes, you must clearly define your assumptions about the best ways to make that change. These assumptions or theories form the basis of your organization's longer term strategies and programming, which can be detailed in organizational processes like logic models, strategic plans, and annual plans.

By defining your organization's Theory of Social Change you will:¹

- ✓ **Establish common principles & vocabulary**
(build consensus and develop a shared understanding)
- ✓ **Make implicit assumptions explicit (scrutinize logic)**
- ✓ **Identify resources and check them for adequacy**
- ✓ **Design more realistic plans of action**
- ✓ **Clarify lines of responsibility and maintain healthy skepticism**
(build accountability)
- ✓ **Create more meaningful evaluations**

¹ Purpose of Theory of Social Change from “Mapping Change: Using a Theory of Change to Guide Planning and Evaluation.” Grantcraft. © 2006.

WHAT IS THE DIFFERENCE BETWEEN A THEORY OF SOCIAL CHANGE AND OTHER PLANNING PROCESSES?

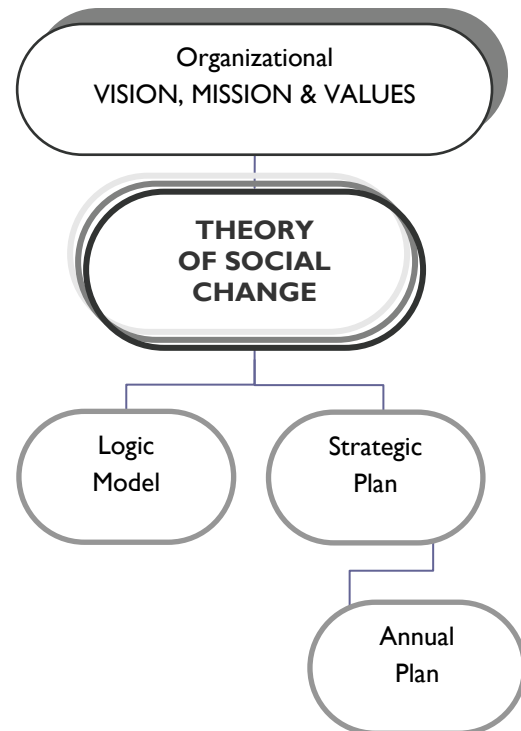
Theory of Social Change	Logic Frames (e.g., Strategic Plan or Logic Model)
Determines overall approach	Details how you control the resources (links activities to outcomes)
Provides analysis (“how” and “why”)	Outlines a program’s components
Social Change Goals	Service Goals
Resources You Have	Resources You Need
Strategies	Activities
Explanatory (describes how change is made)	Descriptive
Visually compelling (connects the dots)	Detailed narrative (explains rationale)
Evaluation and monitoring focuses on learning and telling story of impact	Evaluation and monitoring focuses on justification, input, output, and outcome based on logic plan
Continuously evolving framework	Fixed timeline (often 3-5 years)

From a process perspective, organizations utilize different tools to assist their planning. An **organization’s vision, mission and values** serves as an organization’s aspiration—the foundation of the organization’s identity and purpose.

A **Theory of Social Change** details how an organization is going to actualize their vision over time. A **logic model** is a versatile organizational tool that can be constructed to reflect specific change an organization is looking to make through a particular strategy, program area or at the macro level to detail out how the combination of strategies and programs will effect the change articulated by the Theory of Social Change.

A **strategic plan**, which is usually a mid-level view (3-5 years) of the organization’s work, articulates organizational milestones. And, an **annual plan** is a detailed planning document that draws from each of the other organizational planning processes to identify organizational goals for the year.

Individually, these planning processes help sharpen organizational focus. When used together, all of these planning processes allow an organization to increase its level of strategic intention.



HOW DO WE GET TO A THEORY OF SOCIAL CHANGE?

There are many approaches to create an organizational Theory of Social Change. Having gone through our own process, NGECE's staff team understands how much time and energy this endeavor takes.

In order to make this process both manageable, as well as draw from the existing assets of your organization, we have framed the process of creating a Theory of Social Change into four story element areas.

Each story element can be developed on its own depending on the organization's needs to increase specific organizational competencies. However, when the processes of the 4 story elements are combined, they will produce your organization's Theory of Social Change. A **TOSC Template** is provided at the end of this packet to help you with this final step.

To begin, you should use the **"Role in the Movement - TOSC Spotlight"** on page 7 of this guide to help identify your organization's capacity in each story element.

This will determine your approach in facilitating the process for organizational stakeholders—*Are you creating this competency or reevaluating it to deepen your approach?*

We invite you to engage with the following processes as you see fit for your organization's priorities. We hope the following framework and processes will be helpful in thinking about your work.

II. USING THIS GUIDE

This guide uses a “popular education” format, providing clear and concise instructions so that the reader can facilitate the exercises and activities presented. The exercises and activities can be modified to different organizational contexts and can be used in a variety of combinations. Our aim is to make this guide accessible and adaptable for your organization’s usage as part of its process of organizational transformation in the Organizational Fellowship Program (OFP).

HOW THIS GUIDE IS ORGANIZED

There are 4 “story elements” necessary to create a TOSC. This guide lays out the context for those elements and also frames some exploration questions to help your organization assess and think through each element. Additionally, we offer **14 exercises** in this packet and handouts that correlate with specific exercises as potential activities that your organization may choose to use in order to develop particular areas necessary for the creation of a TOSC.

The “story elements” for building a TOSC are presented in a sequential order that reflects NGECE staff’s best thinking about what sequence of organizational processes make sense when an organization is considering organizational transformation.

To that end, some exercises’ outcomes follow a natural progression into the next exercise, all with the goal of assisting organizations in answering the key questions introduced at the beginning of each element. Key terms used in the exercises are listed in the glossary section at the end of this guide.

The exercises and activities presented are not an exhaustive or exclusive means of generating the outcome for each section. Undoubtedly, you will have additional methods and tools for engaging your organization in this process. In the interest of nurturing our learning community, please share your feedback about what worked, what didn’t work, or what could be better—either through the evaluation at the end of this guide or via direct contact with NGECE staff.

GENERAL TIPS FOR CREATING A TOSC

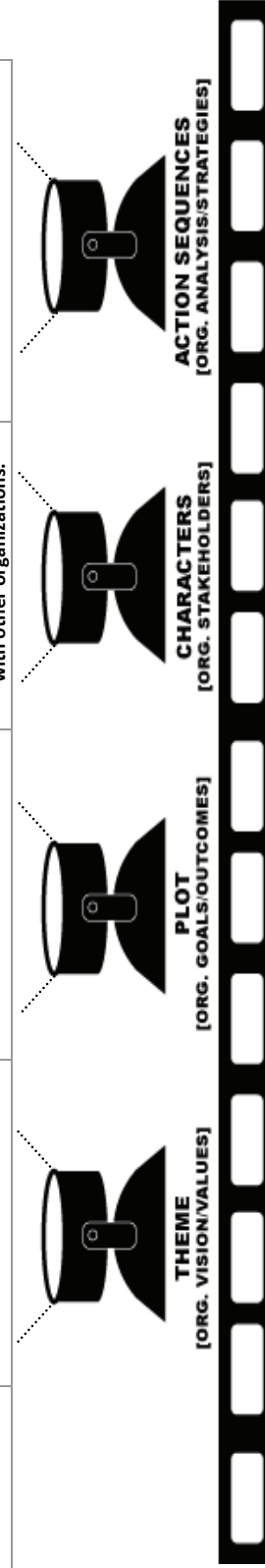
- ★ Ensure that the process is timely:
What did the BRIDGE Organizational Assessment Tool (BOAT) reveal about your organization’s capacity and need for a TOSC?
- ★ Ensure that the process is relevant:
Clarify how the TOSC can guide your work on an ongoing basis and how it connects to your overall strategic/annual plan.
- ★ Ensure that the process is inclusive:
Who do you plan to involve and why?
- ★ Ensure that the scope of the process is appropriate to your organization:
Invest the amount of time that matches the level of depth that you feel is necessary for your group, based on how many people will be involved, how you’ll use the TOSC, and how you want to share it with others.
- ★ Ensure that the outcome is relevant:
Begin to think through how and when to revisit the TOSC within your organization into the future.

III. TOSC SPOTLIGHT

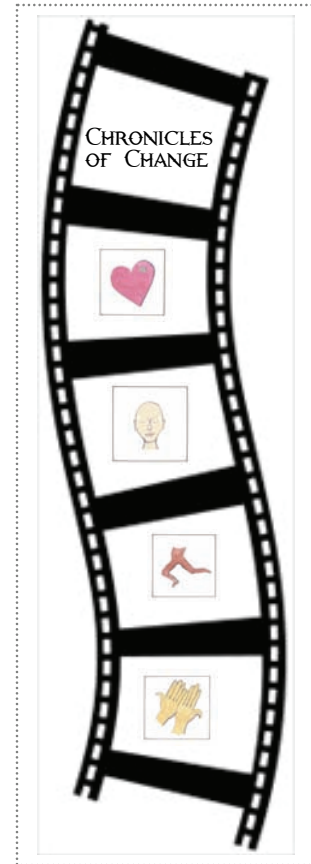
Directions: Review each column of story elements and determine where your organization needs to start your TOSC process, per your existing capacity.

ROLE IN SOCIAL JUSTICE MOVEMENT

SUSTAINABLE	<input type="checkbox"/> Organization's vision and values are consistently communicated throughout the organization and to our constituents.	<input type="checkbox"/> Organization's goals and outcomes pertain specifically and clearly to our role within the social justice movement.	<input type="checkbox"/> Organization engages those most impacted by inequity to speak and act for themselves.	<input type="checkbox"/> Organization is clear about or has a process for figuring out what our role is for any given situation.
STRATEGIC	<input type="checkbox"/> The vision is reflective of the long-term change that we wish to impact or achieve.	<input type="checkbox"/> Organization's goals and outcomes address the long-term change that we wish to impact or achieve.	<input type="checkbox"/> Organization has an up-to-date analysis of our allies, partners, and targets most critical for us to achieve long-term change.	<input type="checkbox"/> Organization works to engage those most impacted by inequity to help determine and shape organizational strategies and priorities.
INTENTIONAL	<input type="checkbox"/> Organization's vision and values reflect aspiration for social justice, which is shared and understood by the board and staff.	<input type="checkbox"/> Board and staff have clarity about how our organization's goals will be accomplished and what outcomes we are working towards.	<input type="checkbox"/> Organization incorporates methods for obtaining stakeholder opinion (e.g. advisory committees, town hall forums, etc.).	<input type="checkbox"/> Organization's board and staff are clear and in agreement about the root causes of the issue(s) we seek to address.
AWARE	<input type="checkbox"/> Organization's vision & values statements are reflective of our organization's current work.	<input type="checkbox"/> Organization has an annual plan, strategic plan, and/or logic model.	<input type="checkbox"/> Organization has engaged in a power analysis to determine its relationship--with the community and with other organizations.	<input type="checkbox"/> Organization has a process for aligning all of our programs and strategies with our vision, values, and goals.



IV. TOSC FRAMEWORK: STORY ELEMENTS



STORY ELEMENT #1: THEME

Organizational Vision & Values

OVERVIEW

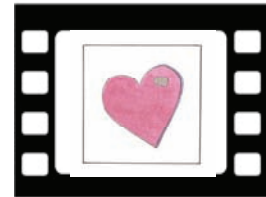
Your organization's identity is the foundation upon which your work is grounded. Therefore, before attempting to lay out your organization's Theory of Social Change, it is important that your group has a shared articulation and understanding of the organization's identity; that is, the shared principles, values, experiences, and ideas that determine how people in your organization interact with each other and with community.

Organizational identity is captured in your mission and/or vision statement, so you may begin by revisiting those statements as a group to check for consensus on the current statements. Some mission and vision statements may not include organizational values, so another step is to explore the underlying organizational values that are inherent in your approach, in your structure, and in your work.

Your organization's values are inseparable from the envisioned future for your community and the strategies your organization uses to enact social change. The fundamental values that shape how your organization views and understands the world creates the operating principles that guide the development and delivery of organizational strategies and decisions, and they inspire collective action. The exercises in this element attempt to help you uncover and discuss your core values.

Although many organizations have vision, mission and value statements already, we include this element as part of the process for creating an organizational TOSC to provide groups with the opportunity to revisit these key pieces.

As you review your current statements you might reflect on these questions: *Do these statements still hold true for your organization? If not, is it time to update them? Do all organizational stakeholders understand and support your organization's vision, mission, and values?* If not, engaging in the exercises connected with this key element may provide an opportunity to enroll your stakeholders in the larger vision of your organization.



In this story element, the following questions will be explored through these exercises:

What is our envisioned future for our community?

★ **Exercise #1: Headline News**

What are the fundamental values, beliefs, assumptions and convictions that shape how our organization sees and understands the world around us?

★ **Exercise #2: Valuing our Community's Vision**

★ **Exercise #3: What's My Worldview?**

How does our organization communicate our values?

★ **Exercise #4: 8 Squares**

Do we act in a manner consistent with our values?

★ **Exercise #5: V is for Values**



STORY ELEMENT #2: PLOT

Organizational Goals & Outcomes

OVERVIEW

Clarity about what all of your organization's programs, projects, campaigns add up to on a long-term basis not only brings focus to what individual board and staff members are working towards, but also provides a larger vision to community stakeholders about how they are connected to issues. Furthermore, transparency about the outcomes your organization is striving to achieve will give your allies a reference point and allow your coalition work to be more intentional.

Establishing clear milestones toward your organization's goals and outcomes increases the ability of your organization's stakeholders to be strategic about what issues it will take up in the organization's name.

Clear milestones also provide guidance for what impromptu coalitions or collaborations make sense and serve as a foundation for broader organizational decision-making that is grounded in common understanding.

While many organizations have existing goals and outcomes, the process of examining those goals and outcomes in the context of an organizational Theory of Social Change provides organizational stakeholders with the opportunity to reflect on the outcome of having strategic goals and outcomes that are aligned with a larger vision:

- ★ *How will your organization know it is successful?*
- ★ *Will your existing goals create the change necessary to achieve your vision?*
- ★ *What does all of your organization's work add up to?*



In this story element, the following questions will be explored through these exercises:

What are the short-term and long-term outcomes we are trying to achieve?

★ **Exercise #6: From Roles to Goals**

Are our organization's goals a reflection of what we NEED to do or what we CAN do?

★ **Exercise #7: Reorganizing Our Sock Drawer**

Does our organization have clear planning processes to achieve our goals?

★ **Exercise #8: I Follow Your Logic**



STORY ELEMENT #3: CHARACTERS

Organizational Stakeholders

OVERVIEW

As your organization reflects on existing community assets, consider how your partnerships and linkages in the community are strategic to help the organization be effective in the role it plays in community. This section will support you in examining your organization's stakeholders to gain clarity and purpose in how your organization mobilizes community, shares and leverages resources and knowledge, and combines efforts with others through collaborations, networks, coalitions, or other formations to achieve larger impact.

Going further, your group can reflect on power dynamics within and among your various stakeholders, and how the organization can become more intentional about building power. This type of reflection can contribute to building your organization's trust within and accountability to community and your overall capacity for long-term impact.

Organizational stakeholders change over time—as a community matures, the role an organization plays in community may evolve, or work with a new primary constituency. Reflecting on organizational stakeholders in the context of a Theory of Social Change allows a group to reevaluate their current role in community.

Further, it provides an opportunity to assess whether or not you have been able to capitalize on the skills and capacities of those who are most impacted, or involve marginalized groups (women, elders, youth, LGBTQ). In service to the larger movement, thinking about how your organization collaborates with other organizations to achieve social justice is a central outcome of examining your organizational stakeholders.



In this story element, the following questions will be explored through these exercises:

How do we define our community?

★ **Exercise #9:**
Stakeholder Mapping

How will we work with organizations and individuals in a way that leverages their assets and acknowledges their challenges?

★ **Exercise #10:**
Keys to Unlocking Community Assets

How do we want to change relationships of power both within our organization and community?

★ **Exercise #11:**
The Power Ladder



STORY ELEMENT #4: ACTION SEQUENCES

Organizational Analysis & Strategies

OVERVIEW

Essential to social justice organizations is the ability to identify the root causes of the problem it seeks to address. An organization's analysis – how it frames issues of inequity – determines its corresponding response. In this way, having a current organizational analysis can assist organizational stakeholders in determining which strategy will best address a particular need or concern on a case-by-case basis.

When your organization operates from this framework, you have greater clarity about what programs or campaigns will achieve your organization's long-term vision. In addition, the organization will become better equipped to respond to demands or requests from the community, funders, or partners, because the group will have a strong and well defined internal rationale for what fits and what does not fit into the organization's analysis and role in the social justice movement.

Because organizations exist in environments that change daily, it is important to examine the organization's analysis and strategies in the context of developing a Theory of Social Change to identify the external and environmental factors that affect your ability to do your work.

It is also an opportunity to reevaluate what core problems are addressed by your current strategies and how stakeholders understand and interpret the root causes of community issues.



In this story element, the following questions will be explored through these exercises:

How do we understand and interpret the root causes of the issues that our organization seeks to address?

★ **Exercise #12: Rooting Out Root Causes**

What core strategies will our organization deploy to serve our role in working toward a common vision?

★ **Exercise #13: One Story, Three Frames**

How can we support an issue given our organization's capacity and existing obligations?










★ **Exercise #14: Questions for Strategic Decision-Making**



**V. SUGGESTED
PROCESSES AND
EXERCISES
TO FACILITATE
YOUR TOSC**



EXERCISE I: "HEADLINE NEWS"²

GUIDING QUESTION	<i>What is our envisioned future for our community?</i>		
PURPOSE & OVERVIEW 	<p>This exercise utilizes creativity and imagination to help participants envision future change in their community by focusing on identifying concrete goals and outcomes of their organization's work over time.</p> <p>In this activity, participants will create a future headline news story about their organization 20 years from now. The headline represents the hoped-for outcome of efforts over the preceding 20 years. A sub-heading, main text, quotes, and caption helps to fill in the picture of the desired change. News stories are then shared in the large group.</p>		
LEARNING OBJECTIVES 	<p>This exercise aims to foster a shared sense of what the organization is working towards, while detailing key aspects of that vision.</p>		
 MATERIALS	<ul style="list-style-type: none"> ✓ Large poster or flipchart paper depicting the frame or template of a giant newspaper article (see  Handout A) ✓ Post-it notes ✓ Markers / pens ✓ Crayons, colored pencils or other drawing tools 	 TIME 60 - 90 minutes	 KEY TERMS "Goal" "Outcome" "Milestone"
INSTRUCTIONS FOR FACILITATOR:			
 	<ol style="list-style-type: none"> 1. Introduce the exercise by explaining its purpose and process for the group. Refer to the newspaper poster ( Handout A: Headline News) and give a brief overview of the different sections on the handout template. 2. Begin with a large group brainstorm of the following questions: <ul style="list-style-type: none"> ★ <i>How do we envision success for our work?</i> ★ <i>Who is the community impacted in the projects and efforts that we have accomplished?</i> ★ <i>What has happened? How can one see this impact?</i> ★ <i>What has our image become in the communities where we work?</i> ★ <i>What do people say about us?</i> 		

² Adapted from COOL and Idealist Civic Engagement Curriculum, <http://www.idealists.org/ioc/learn/curriculum/pdf/Cover-Story.pdf>



3. Feel free to generate other questions that may help the group conceive of and consider far-reaching, impact-oriented, or visionary work. The vision brainstorm will generate thoughts and ideas for the main headline.
4. Next, ask the group to think about 1 short and compelling sentence as a news headline to frame the story.

Participants can either silently write title ideas on Post-its and then share them, or the group can write up ideas together on flipchart paper. Once several ideas have been generated (about 10 minutes), take a vote or come to general agreement to select 1 headline that best reflects the change that the group wants to achieve.



5. Either in small groups or as a large group, instruct participants to complete the Headline News poster, section by section. Allow about 20 minutes for this part of the exercise. Encourage participants to be creative – this is an opportunity to “dream big” for the organization.

6. Reconvene all participants and have them post their headlines along one wall of the room. If desired, 1 member of each group can briefly present their news story to the rest of the group.

Then, ask all participants to gather in front of the posters to do a 10-minute “gallery walk”; that is, a silent, close-up viewing of all of the news stories. This sharing is a powerful part of the exercise for larger groups because it allows people to take a moment to learn from each other’s creativity and ideas.



7. End the activity with an appropriate closing reflection, evaluation, and next steps. Reflection can include statements by members of the larger group about their insights, impressions, and experiences about the exercise.

If appropriate, have the group identify 2 people who will create or amend the organization’s current vision and/or mission statements. Set a date for completion and a process for how the group will review and approve the mission/vision statements.

HANDOUT A: "HEADLINE NEWS" TEMPLATE

<p>HEADLINE: <i>In 5-10 words, encapsulate the community change envisioned</i> [Example: "LOCAL HMONG COMMUNITY ENDS THE PRACTICE OF POLYGAMY"]</p> <hr/>	
<p>SUB-HEADING: <i>Describe what your organization has done to help achieve this change</i> [Example: "Local organization has educated hundreds and pressured community leaders to acknowledge and challenge polygamy's pervasiveness."]</p> <hr/> <hr/>	
<p>MAIN STORY: <i>Include details that reveal the kind of image, vision, values, principles, and impact that you wish to convey about the change that your organization can make in community; including who, what, when, how and why</i></p> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/>	<p>IMAGE: <i>Illustrate a scene that depicts or represents your organization's vision</i></p> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/>
<p>QUOTES: <i>Include fictional creative quote(s) from important stakeholders that help capture your organization's image, vision, values, impact, etc.</i></p> <hr/> <hr/>	
<p>CAPTION: <i>Write 1-2 sentences to accompany the image that compellingly describes the change achieved</i> [Example: "Hmong women, together with their families, celebrate this historic moment."]</p> <hr/> <hr/>	

EXERCISE 2: “VALUING OUR COMMUNITY’S VISION”

GUIDING QUESTION

What are the fundamental values, beliefs, assumptions, and convictions that shape how our organization sees and understands the world around us?

PURPOSE & OVERVIEW



This exercise provides participants the opportunity to envision the effect of their organization’s work through the perspectives of key stakeholders. By expanding the vision of their organization to include the diverse perspectives of the community they serve, the organization will be better able to identify and refine their vision and the strategies necessary to achieve it.

In this activity, participants collectively identify 4 key stakeholders in their community. Participants then individually outline the vision of their community 10 years from now from the perspectives of these 4 stakeholders. The group then shares and reflects on the differing perspectives and common themes in the vision for their community.

LEARNING OBJECTIVES



This exercise aims to foster dialogue about a vision for the organization that is inclusive of the multiple perspectives and experiences of the community they serve.



MATERIALS

- ✓ Large butcher paper divided into 5 columns (1 for each stakeholder)
- ✓ Post-its (5 per participant)
- ✓ Markers / pens



TIME

40 - 75 minutes, depending on the group’s size



KEY TERMS “Vision”

INSTRUCTIONS FOR FACILITATOR:



1. Introduce the exercise by explaining its purpose and process for the group. Share that the exercise is meant to capture the various perspectives of the organization’s effect on the community in 10 years’ time.
2. Facilitate a brief discussion between the participants to identify 4 main stakeholders of the organization. [See Exercise #9: Stakeholder Mapping for a more extensive way to identify stakeholders]. Write the different stakeholders along the top of the butcher paper, one in each column.

The last column is reserved for the participants' individual vision and can be labeled "participants."



3. Ask the participants to answer the question, *"What would you like each of these people to say about your organization's work in 10 years?"* The 5th Post-it is for the participant's own vision in 10 years.
4. Pass out 5 Post-its to each participant and have them write for 10 minutes. Then have them place their Post-its under each column.
5. Gather the participants in front of the poster and ask them to silently read all the Post-its on the paper, looking for the primary themes in what was written.



6. **Group discussion questions:**

- a. *What do you notice? General reflections?*
- b. *Do the themes reflect the organization's current vision and work?*
- c. *If there are contrasting themes: What accounts for the differences you notice in the vision for the organization? Is there disconnect between the participants' vision and the vision of the community members?*
- d. *How will your organization reconcile and prioritize each of the different perspectives?*
- e. *Did any insights arise?*

7. Finish the exercise by providing a synthesis of the discussion and emphasize the following points:

- ★ There are many perspectives about the aspirations for the organization that are based on different lived experiences and they all matter.
- ★ Recognize the strength of having a common vision that is reflective of the diversity of the community's assets and needs.
- ★ This exercise is an attempt to help groups create a dialogue to develop and refine a collective vision, which is very important for organizations wanting to become more intentional about social justice work.

8. Additional follow-up questions that participants can discuss include:

- ★ *What are some challenges in implementing this vision?*
- ★ *What has to change within the organization to align the vision of the organization with its current work?*



NOTE

An alternative, but more extensive version of this exercise, would be to interview a few stakeholders (community members, elected official, former board members, other staff, etc.) and bring this information back to the group. This process would then require follow-up with these stakeholders in terms of the results of the visioning process, but may be a positive way to re-engage community members in the current work of the organization.

EXERCISE 3: "WHAT'S MY WORLDVIEW?"³

GUIDING QUESTION

What are the fundamental values, beliefs, assumptions, and convictions that shape how our organization sees and understands the world around us?

PURPOSE & OVERVIEW



This exercise helps participants reflect on their own values, ideas, and beliefs about the society in which they live. It also attempts to help individuals link their personal worldview with a more collective organizational worldview. The exercise specifically asks participants to draw out their values in order to think about their organization's approach to social justice work.

In this activity, participants share common proverbs or sayings concerning power and justice. Individuals identify which sayings either reflect or oppose their own views. The group then reflects on which saying(s) reflect the worldview of their organization.

LEARNING OBJECTIVES



This exercise aims to foster dialogue and shared understanding about individual and organizational values and principles.

MATERIALS



- ✓ Large butcher paper depicting a giant Planet Earth
- ✓ Small pieces of paper or index cards (approx. 3"x5"), at least 1 per participant. These can be in the shape of magnifying glasses to symbolize a "lens" or view on the world.
- ✓ Markers / pens



TIME

1.5 – 3 hours
depending on the
group's size &
depth of the
conversation



KEY TERMS

"Organizational
values "
"Worldview"
"Justice"

INSTRUCTIONS FOR FACILITATOR:



1. Introduce the exercise by explaining its purpose and process for the group.
2. Depending on the size of the group, divide participants into small groups of 4 - 5. Have the small groups take 7-8 minutes to brainstorm common sayings or proverbs concerning power or justice.

³ Adapted from "Introductory Activities: Worldview, Frames and Themes" by Grassroots Policy Project

Give the groups a couple of leading examples, such as:

“United we stand, divided we fall.”

“You can’t fight city hall.”

“Injustice anywhere is a threat to justice everywhere.”



3. If the sayings are in different languages, participants should explain the essential meaning in English or the predominant common language spoken by the group. Small groups can designate 1 person to write all of the sayings on index cards. Cards should be large enough for everyone to be able to read the words from a few feet away.
4. After 7-8 minutes, reconvene the large group and have 1 person from each group post the cards on the large “globe” paper. Gather the participants in front of the butcher paper and ask them to point out which sayings are disempowering or demobilizing, and which sayings encourage action or empowerment. Mark these with a “minus” or “plus” sign. Point out which of these sayings are dominant in society and which ones are representative of our own communities’ beliefs.
5. Now ask participants to name which sayings reflect or oppose their own personal worldview. Note these.

Which sayings reflect or oppose their organization’s current worldview?

Group these on 1 side of the globe visual.

Which saying(s) reflect the kind of worldview that you want for the organization into the future? Group these sayings as well, and ask participants to read them aloud together.

Is this how we have previously articulated the organization’s mission and vision? If not, what has not been captured in the past?

For example, discuss how the organization approaches issues of inequity. How does the organization view or respond to oppression based on gender, race, class, age, sexuality, or other factors?



6. Finish by summarizing the group’s discussion about the organization’s core values. Are people generally in agreement? Did any new insights arise? Any areas to flag for future discussion?
7. If appropriate, have the group identify 2 people who will synthesize the organizational values into clear and concise value statements after the exercise is complete. Set a date for completion and a process for how the group will review and approve the value statements.

EXERCISE 4: “8 SQUARES”⁴

GUIDING QUESTION

How does our community communicate our values?

PURPOSE & OVERVIEW



This exercise provides participants the opportunity to examine their organization’s current programs and activities in order to identify and explore their organization’s underlying values.

In this activity, participants receive a sheet of paper that is folded into 8 sections. In each section, they name a current activity of the organization. On the back of the sheet they write the benefit of this activity to their community as well as what the activity says about what the organization values. The group then shares and reflects on the various values named during the exercise.

LEARNING OBJECTIVES



This exercise aims to begin a process of identifying and outlining an organization’s values in order to create a shared sense of what is most important about the organization’s history, current approach and envisioned change.



MATERIALS

- ✓ 1 sheet of 11 x 17” (legal) white paper per participant
- ✓ Pens
- ✓ Flip-chart
- ✓ Markers



TIME

45 – 60 minutes



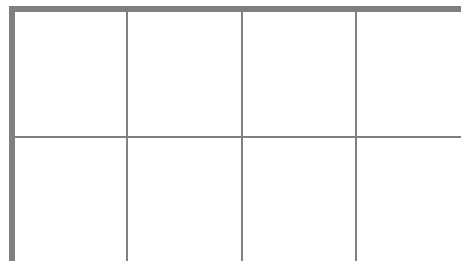
KEY TERMS

“Values “

INSTRUCTIONS FOR FACILITATOR:



1. Introduce that the overall frame for the values exercise is how the organization communicates its values in all of its various activities, from internal meetings to program events.
2. Pass out 1 sheet of legal paper to each participant. Have the participants fold the sheet into 8 sections.



⁴ Adapted from “32 Squares,” Developing Individual and Shared Visions, Interaction Associates, LLC 1998 ©



3. Instruct the group to individually jot down 8 different activities that their organization currently carries out on one side of the paper. (5 minutes)

Explain that these activities can encompass both internal (staff meetings, retreats) and external activities (community education, participating in coalition meetings).

4. Once everyone has filled in the front side, have the participants turn the sheet around and answer the following question for each activity listed on the front side. (15 minutes)

Ask the group, *"What does our participation in this activity say about what our organization values?"*



5. Once everyone has completed answering the questions, ask them to circle any words used multiple times.
6. As a group, have participants share their recurrent words and themes and write them on the flip chart.
7. Facilitate a discussion on several or all of the following questions:



- ★ *What are the overall themes in what the organization values? Identify and list themes.*
 - ★ *What values are missing?*
 - ★ *Is there overall agreement on the organization's values? If not, why?*
 - ★ *Values affect not only the type of activity an organization carries out but also how it carries them out. How do these values shape the way the organization carries out X activity?*
 - ★ *How can these values help the organization prioritize its work?*
8. Have the group identify 2 people who can synthesize the values into clear and concise value statements after the exercise is complete. Set a date for completion of the values statements and a process for how the group will review and approve the value statements.



NOTE

An optional follow-up activity is to lead the group in a deeper discussion through the next exercise, "V is for Values."

EXERCISE 5: “V IS FOR ‘VALUES’”⁵

GUIDING QUESTION

Do we act in a manner consistent with our values?

PURPOSE & OVERVIEW

This exercise helps a group think about how they operate in order to draw out collective values and allow space for dialogue about them.



In this activity, participants divide into small groups and complete a chart that articulates their values. Then, they chart out examples of how different values are practiced or not practiced within their organization.


LEARNING OBJECTIVES



As a result of this exercise, a group will be able to more clearly identify how to align their organizational values with their practice.



MATERIALS

- ✓ Copies of  **Handout B**
- ✓ Pens/pencils
- ✓ Flipchart paper



TIME


60 - 90 minutes
depending on
group's size



KEY TERMS

“Values”
“Organizational values”

INSTRUCTIONS FOR FACILITATOR:

1. Introduce the exercise by explaining its purpose and process for the group.
2. Pass out copies of the  **Handout B**: “V is for “Values” Alignment Chart.



Divide participants into small groups of 3 - 4 people.

Ask the small groups to brainstorm up to 6 of your organization's core values, and have 1 person (the recorder for the group) write the values in the first column (“Values”).

Then give the groups 20-30 minutes to discuss and fill in the rest of the chart together.

⁵ Adapted with permission from Leadership Paradigms, LLC.

If the group has already developed a set of core values and/or has completed the 8 Squares exercise, feel free to use these values for this column and skip to step 4.



3. Ask each small group to report back. Flag the values that were raised in multiple small groups, since there is some agreement that those are core values across the organization.

4. Facilitate a discussion about how the organization's values are conceived of and practiced.

★ *What were some of the difficulties or sticking points in thinking about how our organizational values are practiced?*

★ *What may be some concrete ways to become more deliberate and consistent about practicing the values that we named?*



Record insights on flipchart paper.

5. Wrap up by noting to the group that it is impossible to always consistently "live out" our values in our work, because there are inherent conflicts and complexities in any values system.

However, this exercise serves as a reflection tool to attempt to draw attention to how organizational values are practiced. The core values that were raised over and over become the values that the organization can underscore in its Theory of Social Change.



6. If appropriate, have the group identify 2 people who will synthesize the values into clear and concise value statements after the exercise is complete. Set a date for completion and a process for how the group will review and approve the value statements.



HANDOUT B: “V IS FOR VALUES” ALIGNMENT CHART

I. VALUES List your organization's core values in each space below <i>Ex: Unity</i>	II. ASSUMPTIONS of VALUE List your assumptions about this value <i>Ex: Everyone gets along in the organization; we are collaborative; our clients see "unity" in our services and programs</i>	III. DEMONSTRATION of VALUE List how you feel your organization demonstrates this value <i>Ex: We don't have staff meetings that often; There is unity but it needs to be more clear to staff; We should go out more as a group or do more things together; We do come together when there is a crisis, but mostly if we are in crisis.</i>	IV. WHAT SHOULD VALUE LOOK? In this space, write your dreams or visions of what this value should be as if it is happening now. <i>Ex: Staff and management are working together as a team and there is trust, reliability, accountability, and honesty represented in this value. When there is a decision that is made, our organization looks for input from everyone. We want our systems and processes to be created through and in unity.</i>

EXERCISE 6: “FROM ROLES TO GOALS”

GUIDING QUESTION

What are the short-term and long-term outcomes that we are trying to achieve?

PURPOSE & OVERVIEW



This exercise uses an open and welcoming space to help a group think about how the goals and outcomes of their organization add up to the long-term change that they seek to achieve within the community.

This activity is structured as a talking circle; a safe space guided by ground rules set for the open dialogue. Participants can jointly name specific goals of the dialogue, or they can be determined by the facilitator. The talking circle’s basic format is to share various opinions and perspectives. The facilitator guides the discussion in order to arrive at new and significant conclusions as a group and determine the implications for the organization.

LEARNING OBJECTIVES



This exercise allows participants to reflect on organizational goals and outcomes in order to gain clarity on their organization’s role in the social justice movement.



MATERIALS

- ✓ Flipchart paper
- ✓ Markers / pens
- ✓ Copies of the organization’s most current strategic plan or other planning document
- ✓ Symbolic object that will serve as a “talking stick” for the group
- ✓ **Handout C**



TIME

2 - 3 hours



KEY TERMS

“Talking circle”


INSTRUCTIONS FOR FACILITATOR:



1. Before convening your group together to engage in this exercise, think about which individuals you would like to be present in order for people to feel safe sharing their opinions and perspectives on the work. Is confidentiality important?

Decide whether to set up multiple meetings to facilitate talking circles with different groupings of people.

2. Introduce the exercise by explaining its purpose and process for the group. Describe the method of a talking circle so that everyone understands the process that the group is about to undergo.

3. Either in advance or together as a group, look at  **Handout C** and decide which quotes you would like to use to center the discussion. Determine as a group what the anticipated outcomes will be from the dialogue (i.e. what you hope to get out of engaging in the conversation). Set a timeframe for the dialogue.




4. Take 10-15 minutes to create a safe space for the discussion. Configure the chairs in a set-up that encourages dialogue. Take a few minutes to establish ground rules together and post them on flipchart paper. Appoint a note taker, a timekeeper, and a process observer (someone designated to observe how the discussion goes) if you wish.
5. Hand out copies of the organization's most current strategic plan, annual plan, organizational work plan, or other planning document that lists the goals and outcomes of the organization. Instruct the group to use this document as a reference point as the group engages in the conversation.

COMMON EXAMPLES OF GROUND RULES:

- ★ Acceptance of diverse perspectives and processing styles
- ★ Recognition that the process is as important as the outcome(s)
- ★ Attitudes of openness, cooperation, support, trust, respect, etc.
- ★ Patience and good listening skills



6. Use a symbolic object (such as a rain stick, a candle, or other object) and explain that a person must be holding the "talking stick" in order to speak. After each person speaks, they pass the talking stick to the next person who wishes to speak. Then, to begin the talking circle, ask 1 participant to read the chosen quote or quotes out loud from  **Handout C**.

7. Ask participants to share their reactions to the quote(s). *Does it resonate with your own experience or perspective? Are these stories similar to what's happening within our own organization? What specifically does it highlight or affirm in terms of the challenges of our organization's work? How do these issues and tensions play out in how we plan and carry out our strategies? Most importantly, what does this mean for the ongoing and future work of our organization?*



8. Note that your role as the facilitator is key to making this exercise successful. Try to be mindful of how to best guide the group and direct the conversation, while also helping to make the space feel open so that everyone can contribute.

9. About 10-15 minutes before the time ends for the discussion, ask to hear from the appointed process observer. The process observer can share what s/he observed. Some considerations may include: *Did everyone contribute? What style did the group exhibit? What style did the facilitator use? What was it like to observe?*

10. If the group decides to revisit or reframe any part of your organization's planning document as an outcome of the talking circle, identify the next steps. Set a date for completion and a process for how the group will review and approve any changes to the plan.



HANDOUT C: ROLES TO GOALS REFLECTIONS⁶

Quote #1:

As the Executive Director of a small AAPI organization, I'm in the grind every day trying to get to that next foundation proposal I need to write or trying to get my supervision time in for people... And I try to rationalize it by saying, 'by building this organization, I'm contributing to the building of a broader, more dynamic movement.' But the reality is, I don't step back and I don't have the perspective of a forest. I'm kind of stuck in the trees.

Quote #2:

If we're talking about social justice organizations, I think it's incumbent on us to really live the values that we are preaching and that's very hard to do, because I don't think we have a really effective concept of democracy. We don't have a good model to go on...and so, what I see organizations doing a lot is choosing efficiency over democracy. And sometimes that works, sometimes it doesn't.

Quote #3:

When you create organizations that are too rigid in their structure and where roles are assigned in too rigid a fashion, then you inhibit yourself from being able to be responsive and connected with people...we basically become too enamored with our own organizations and forget what purpose we're serving.

Quote #4:

I don't lie to myself. Our organization has been around for twenty years now. We are a part of the system. We've been incorporated. We have bylaws. We're United Way affiliated. We've got a board of directors. We have a strong nonprofit organization, but is this the entity that's going to bring about marriage equality?

Quote #5:

Our vision is maybe clearer than it's ever been...but the structures that we have in place, which were created twenty years ago, are suddenly not relevant to the work we have to do. And there are a lot of people wedded to the old structures whose power is in the old structures...I think this is true of a lot of groups, that the older generation does things in a certain way, based upon what they know. How can we address this dynamic within a cultural organization that values "elders in our community," and allows for younger people to lead?

Quote #6:

I think that most of us who have nonprofit status and are really about movement building have to realize that a 501(c)(3) will allow you to do certain limited things...so I think we need to come to the table understanding what a 501(c)(3) organization is and is not capable of doing.

⁶ Adapted from "Building Movement vs. Building Organization: Summary of Regional Discussions" by the Building Movement Project, http://buildingmovement.org/pdf/Building_Movement_vs._Building_Organization_.pdf



Quote #7:

One of the ways that we've tried to make our structure reflect our values is by having a board that is made up of people who are directly impacted by the gentrification in the neighborhood. Not so much a fundraising board, or a board of people with a lot of name recognition, but working folks who are bonded together because some developer wants to evict them and build million-dollar condos. The challenge is that while we value leadership development, it is a long-term process, and we struggle to balance these values with our needs as an organization.

Quote #8:

It seems important to have a notion about how change happens and an analysis....if you have an analysis, which may be right or may be wrong, at least then you can see how the pieces fit together and you can ask the question, 'is your organization advancing some piece of that strategy for change?' If you don't have an analysis that you share and agree upon, it seems to me the discussion becomes incoherent.

Quote #9:

When I first started doing this work, the emphasis in the early '90s ...was that organization building was the imperative. I mean it was like the main thing. You needed to build strong organizations, all right? So when we talk about community organizing, it was always with the sight of you needed to build strong organizations. And I think that started to unravel for me. So it was like well, organizations are really important but what are we actually building organizations for? So I know that organizers in other organizations have really started thinking about what it would take to have more transformative organizing.

Quote #10:

In order for our organization to create change, we need to focus on key things that interest our larger community. As part of this, we have to figure out how to transform the issues that Asian women face into messages that the community can understand. In this way, we can better bring men into the process rather than alienate them. And we can better help women to understand the issues and feel motivated to challenge the system and have a voice at the table. The timing to do this is now...we need to develop a deliberate philosophy, long-term views, and impact areas to help us focus our organization's attention.

Quote #11:

I am so excited to work for this organization but I've recently found out that some people have very different views about what direction the organization should go in and some seem to not even get along with each other. Sometimes it's really frustrating because it makes it hard to plan for the future. I'm realizing that it takes truly committed members who share a common vision to really move the organization along. Having members with high energy seems only second to having a similar vision for us to work together towards.

EXERCISE 7: “REORGANIZING OUR SOCK DRAWER”⁷

GUIDING QUESTION

*Are our organization’s goals a reflection of what we **NEED** to do or what we **CAN** do?*

PURPOSE & OVERVIEW



This exercise helps participants envision and prioritize goals and outcomes of the organization’s work that fit within its role for long-term change. It allows the group to focus on the work that best helps to achieve the organization’s desired impact without “being everything to everyone.”

In this activity, the group uses an analogy of a sock drawer to think about and reflect on their organization’s goals, outcomes and overall direction. The group divides into pairs to discuss and make recommendations.

LEARNING OBJECTIVES



This exercise aims to allow people within an organization to look at their strategic plan or another planning document with a new, fresh lens, which can help them think more deeply about what their goals and outcomes add up to.



MATERIALS

- ✓ Flipchart paper
- ✓ Copies of organization’s strategic or annual plan, logic model, or similar planning document
- ✓ 1 or more copies of “The Sock Drawer” story (📄 **Handout D**)
- ✓ Different patterns of socks drawn on small sheets of paper (1 per participant, so that they can divide into pairs)
- ✓ Markers / pens



TIME

1.5 - 2 hours



KEY TERMS

“Goal”
“Outcome”
“Milestone”

INSTRUCTIONS FOR FACILITATOR:




1. Introduce the exercise by explaining its purpose and process for the group. One of the most significant challenges of many organizations is prioritizing the goals and outcomes that best correspond to its role in the social justice movement, and in turn, the strategies and programs that best fit within those goals and outcomes.

It can be difficult to strike the right balance between being responsive to changing community needs while also knowing when to say no. In other words, it is important to hone in on the work that best helps to achieve the desired impact without “being everything to everyone.” This activity can help the group explore how to make sense of this challenge.

⁷ Adapted from “Spirit in Motion: Sustainability Toolkit” by the Movement Strategy Center, 2006
http://www.movementstrategy.org/media/docs/5857_SIMtoolkit.pdf

2. When introducing this activity, explain that this can be a very sensitive and/or political conversation, and that participants should feel safe and comfortable sharing. You may wish to have the group set ground rules and/or use other ways to establish a safe space. (See *Exercise #6 "From Roles to Goals"* for suggestions on how to do this.)



3. Share the story of the sock drawer ( **Handout D**), either by posting it on flipchart paper and asking 1 person to read it out loud, or by handing out copies of the story to all participants. Then ask people to divide into pairs to discuss the organization's "sock drawer;" that is, the goals and outcomes that underscore all of the organization's current work. Ensure that all participants have a copy of the organization's most current strategic plan, annual plan, organizational work plan, or other planning documents to refer to.
4. Divide the group into pairs by handing out random socks (drawn on sheets of paper) and asking each person to find their sock pair. Give the 2 partners 15-20 minutes to look at the organization's current planning document and scrutinize whether the stated goals best fit with their understanding of the organization's role and larger aims for long-term change. (*Note that if the group's understanding of this vision for long-term change is unclear or in conflict, begin with exercises from the first section of this packet to precede this exercise.*)

Each pair then needs to generate some reflections and recommendations for re-wording or revisiting any goals, outcomes and strategies. The guiding question for all of the pairs is, *"How can we best align our vision with our stated goals, outcomes and strategies?"* One person from each pair should record their recommendations on flipchart paper, and the other person can be assigned to share the conversation with the large group.



5. Instruct the pairs to come back together and share their recommendations. Are people generally in agreement? What does the group want to do about any differences of opinion? Did any new insights arise when you listened to the other pairs? How did pairs think about how we address issues of race, class, gender, sexuality, or other factors in our goals and outcomes? Are there any areas to flag for future discussion?
6. If the group would like to schedule additional times to continue the discussion, new or existing pairs can interview each other to elicit perspectives on a variety of aspects. Here are some potential topics to delve into:
 - ★ Links between our strategies and/ or our vision of social change, and the structure and/or form of our organization
 - ★ Assets that our organization uniquely offers that best positions us for a certain role
 - ★ Challenges we experience in keeping our organization going and in addressing the mission/vision of our organization
 - ★ Organizational structures that best facilitate working towards building larger momentum towards change
7. If the group decides to revisit or reframe any part of the organization's planning document as an outcome of the talking circle, identify the next steps. Set a date for completion and a process for how the group will review and approve any changes to the plan.



HANDOUT D: THE SOCK DRAWER STORY

My dad used to tell me that I could get new socks if I needed them. If my socks were torn, too small, missing their other half, or stretched out beyond repair, I could get new ones.

The condition of this was I emptied out my drawer and let go of as many socks as I got new. So, rather than jam new socks in on top of the torn up old socks, clean out the old before bringing in the new.



We thought this was a good metaphor for our organization in thinking about our programs and strategies. Rather than the idea of cramming more and more new things on top of what already exists (and that we may have outgrown, worn through, or lost pieces of), we want to take a minute to thin out what we've got and make space for our new socks.

In other words, we could have an overloaded and ineffective “sock drawer” if we respond to every opportunity, or every request, or every idea for a new initiative, or if we keep our old strategies beyond their timeliness. Also, it is important that all of our socks (programs, strategies, projects and initiatives) are well matched; that is, that they fit cohesively under the overarching vision that we are working towards as an organization.

Ultimately, the metaphor of our work as a “sock drawer” can encourage us to step back and be intentional. It allows us to think carefully and to assess not only what is needed in our community, but also what makes sense for our organization given our priority goals, our limited capacity, and our role within the social justice movement.

EXERCISE 8: “I FOLLOW YOUR LOGIC”

GUIDING QUESTION

Does our organization have clear planning processes to achieve our goals?

PURPOSE & OVERVIEW



This exercise helps participants synthesize the concrete goals defined and discussed in previous exercises. The corresponding template will help the organization think about their goals in relation to their community and organization’s assets and challenges.

Participants will review discussions from previous exercises about the organization’s goals, refine and synthesize the goals, and track them on the corresponding template. The discussion will focus on the how the goals are connected to an assessment of the community and organization’s assets and ultimately the organization’s strategic activities.

LEARNING OBJECTIVES



This exercise aims to create a shared sense of what the organization is working towards, while taking into account the context of the assets and challenges of the community in which the organization is situated. The exercise will help the organization evaluate whether their goals are reflective of and responsive to the current context of the organization’s and community’s capacity.



MATERIALS

- ✓ Large poster copy of **Handout E**
- ✓ Flipchart
- ✓ Current organizational goals
- ✓ Copies of notes from “From Roles to Goals,” and “Reorganizing our Sock Drawer”
- ✓ Individual 8 ½ “ x 11” copies **Handout E**
- ✓ Markers / pens



TIME

60-90 minutes



KEY TERMS

“Goal”

INSTRUCTIONS FOR FACILITATOR:



1. Introduce the exercise by explaining its purpose and process for the group.
2. Have the group quickly summarize the main points from the previous exercises “From Roles to Goals” and “Reorganizing our Sock Drawer” and chart the main points on the large copy of **Handout E**.
3. Have the group review its current organizational goals.

4. Divide the participants into 3 groups and give them 15-20 minutes to tackle 1 of the following questions.



- ★ *Given the previous discussions from earlier exercises, do our current organizational goals address the main themes from these discussions? If not, why not?*
- ★ *Do the organization's goals take into account the organization's own assets and challenges?*
- ★ *Are the organization's goals responsive to both the challenges and assets of our community?*

5. Gather everyone together and have the small groups report out.

Ask the large group:



- ★ *Given the individual discussions, are there goals that should be added or refined? Are their goals that can be combined?*
- ★ *What processes or steps can the organization take to reevaluate the organization's goals in relation to changing conditions in the community, experience of staff, emerging opportunities, etc.?*

6. If the group decides to revise its organization's goals, identify the next steps. Set a date for completion and a process for how the group will review and approve any changes.



NOTE

If your organization has existing analysis of your organization's and community's assets and challenges, it may be helpful for you to include this information in the following hand-out prior to having your stakeholders evaluate your current goals.

If your organization does not have existing analysis of these two areas, it may be helpful to conduct this activity in conjunction with exercises from Story Elements #3 & #4.



HANDOUT E

GOALS:

1.

2.

3.

4.

COMMUNITY:

<u>ASSETS</u>	<u>CHALLENGES</u>
---------------	-------------------

ORGANIZATION:

<u>ASSETS</u>	<u>CHALLENGES</u>
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EXERCISE 9: "STAKEHOLDER MAPPING"

GUIDING QUESTION

How do we define our community?

PURPOSE & OVERVIEW



This exercise encourages participants to think critically about how their organization develops and maintains relationships and linkages with others. Stakeholder mapping can help organizations 1) leverage and build upon partnerships in the future; and 2) determine how those who are most impacted by inequity can shape and participate in the work.

This activity leads a group through a process of analyzing organizational stakeholders. First, stakeholders are identified and their interests and influence are discussed. Then, the group begins to prioritize their cultivation, interaction and connection with the various stakeholder groups.


LEARNING OBJECTIVES



This exercise aims to help participants think more deeply about who is involved in their organization, what roles they play, and how they can help the organization be more effective in working towards social justice. Participants begin to identify how their organization's linkages and connections can become more strategic.



MATERIALS

- ✓ Large colored Post-it notes
- ✓ Large butcher paper
- ✓  **Handout F:** "Circles of Influence" Stakeholder Map
- ✓ Markers / pens



TIME

2-4 hours
depending on
the group's size
and
depth of
dialogue



KEY TERMS

"Stakeholder"
"Key stakeholders"
"Stakeholder analysis"
"Power"
"Client"
"Constituent"

INSTRUCTIONS FOR FACILITATOR:



1. First, explain the purpose and process of this activity for the group. Have posted definitions of the terms listed above on flipchart paper. Either read the definitions out loud, or have members of the group take turns reading the definitions out loud to the group.
2. Explore the notion of "stakeholder" as a large group. How do we understand the term? What kinds of terminology do we currently use to refer to categories of our stakeholders (such as client, member, constituent, affiliate, partner, participant, or other labels)?

Remind the group that stakeholders do not only refer to a category of individuals, but that the term can also include ally organizations, social service agencies/organizing groups that cater to the same constituents, government institutions, funders, or other types of groups that are linked with the organization.



3. Next, ask the group to brainstorm the key stakeholders of the organization, meaning those who have significant importance, support and/or influence. Write the stakeholder names on large Post-it notes and post on butcher paper. Spend no more than 10 minutes identifying stakeholders.
4. As a group, review the stakeholder list and discuss them to better understand the people, groups, and institutions connected to your organization. Encourage small groups to stay focused on their key stakeholders. The amount of time that you spend on this step can vary quite a bit, from 20 minutes to over 1 hour, depending on the level of depth you would like to accomplish.

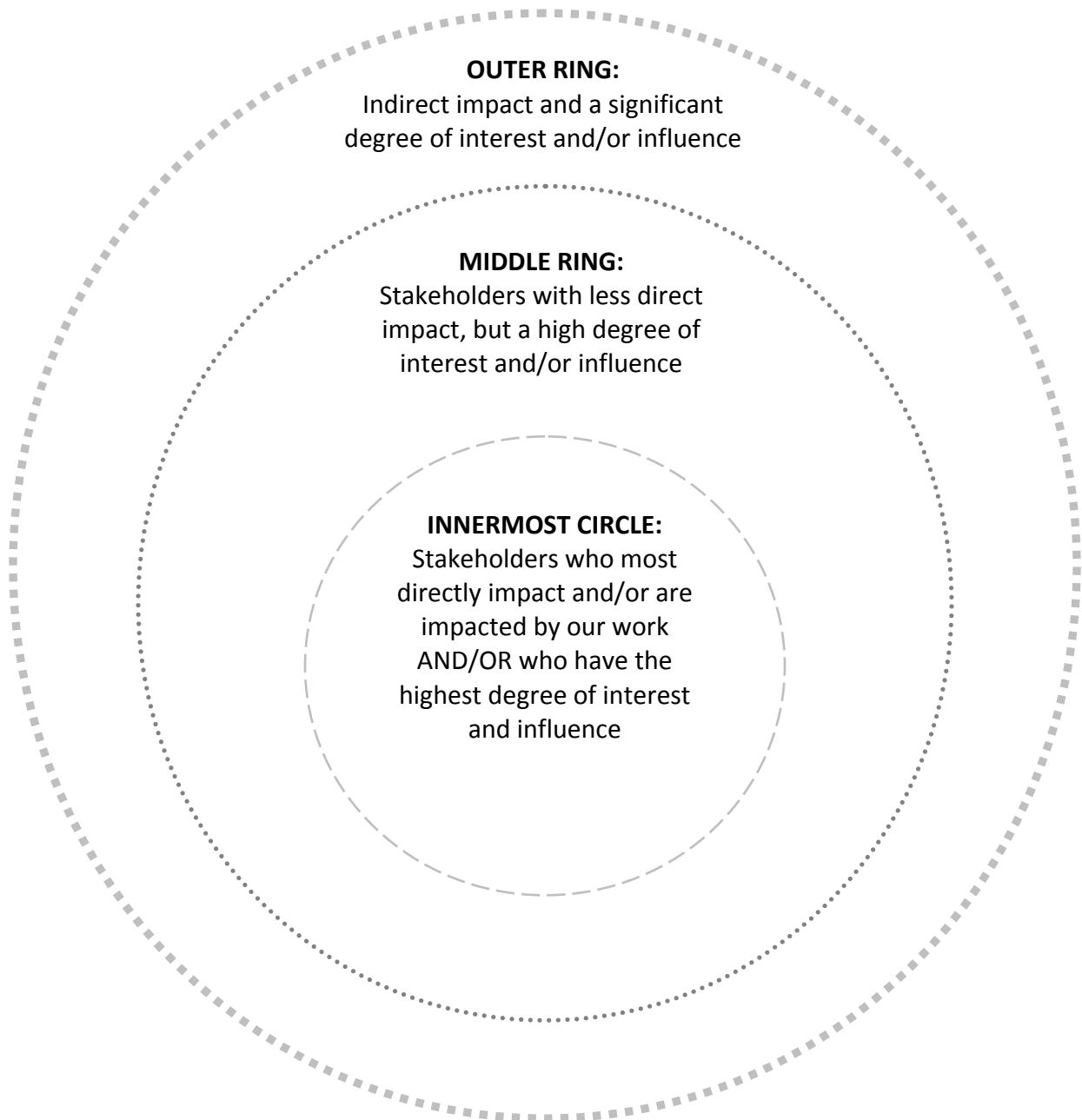
Here are some questions and criteria that may center the discussion:



- ★ How is this stakeholder group important? What is their “stake” or their interests?
 - ★ Assess their level of influence or impact in the community or in the organization (high/medium/low). Mark it on the Post-it.
 - ★ Assess their level of support towards the organization (positive/neutral/negative). You may also note specifically what this stakeholder group contributes to the organization.
 - ★ Assess their level of interest in the organization’s success (high/low). Mark it on the Post-it.
 - ★ Assess their attitude towards the organization (supportive, receptive or obstructive). Mark it on the Post-it.
5. To wrap up this activity, bring the group back together and ask participants to briefly share their assessments of the various stakeholder groups. Which stakeholders are of highest priority to cultivate or to better involve? If time permits, you may post or draw a chart of “Circles of Influence” (📄 **Handout F**) for your organization. Then, instruct the group to position the stakeholder Post-its on the inner and outer rings of the circle, depending on who is of highest priority and of most direct impact. Explain that the circles are not rigid; some stakeholders may fall between the lines.
 6. Note that certain factors may arise that are most relevant to your organization at this time, such as the relative positions of women and men in terms of representation and influence and a desire within the organization to shift the status quo. Think also about urgency and timeliness of the work when considering which stakeholders are of highest priority. Consider how to involve the members of your community who are most impacted by inequity.
 7. Thank participants for their thoughtful reflection and outline next steps together, if any.



HANDOUT F: “CIRCLES OF INFLUENCE” STAKEHOLDER MAP



EXERCISE 10: “KEYS TO UNLOCKING COMMUNITY ASSETS”

GUIDING QUESTION

How will we work with organizations and individuals in a way that leverages their assets and acknowledges their challenges?

PURPOSE & OVERVIEW



This exercise helps a group analyze community stakeholders as an important and vital resource for the success of their work. It encourages a deconstruction and reconstruction of who they think of as allies, partners and targets of the organization.

In this activity, the group selects 1 or more case studies to read and discuss. The group uses the case(s) to draw parallels and spark dialogue about how their own organization views, engages, and capitalizes on the stakeholders within their community. *(Note: This exercise is a follow-up to Exercise #9: Stakeholder Mapping)*

LEARNING OBJECTIVES



This activity goes one level deeper than a stakeholder analysis. It allows participants to reflect on levels of power and different roles in the organization and in the community. Participants are encouraged to think more deeply about how their organization can better leverage its relationships.



MATERIALS

- ✓ Completed stakeholder map “Circles of Influence”
- ✓ **Handout G: “VAYLA-NO Case Story”**
- ✓ Markers / pens



TIME

1 - 2 hours



KEY TERMS

“Stakeholder”
“Key stakeholders”
“Stakeholder analysis”
“Power”

INSTRUCTIONS FOR FACILITATOR:



1. Introduce the exercise by explaining its purpose and process for the group.
2. Divide the group into pairs or small groups. Select 1 or more of the case studies for groups to read and have a discussion about (See **Handout G: “VAYLA-NO Case Story”**). Ask groups to discuss their impressions of the story and what similarities or differences they can see within their own organization in terms of how they think about their community stakeholders.

3. Come back together as a large group and ask for volunteers to share what their groups discussed. Did the story prompt people to think about their own organization's stakeholders differently?
4. Now, ask the group to turn their attention back towards the "Circles of Influence" stakeholder map that they created in the last exercise.



The intention of this part of the exercise is to help participants think about their organizational stakeholders more strategically. In other words, participants can generate ideas for how various stakeholder groups can be incorporated and engaged in new and different ways in service of achieving the organization's long-term goals.

Potential discussion questions that may accompany the case study include:

- ★ *What is the change that our community wants to see happen?*
- ★ *What are the assets of our community stakeholders?*
- ★ *What are the challenges and opportunities of our community stakeholders?*
- ★ *What are the oppositions or sticking points of this stakeholder group to our stated goals/vision?*
- ★ *How can we work more collaboratively with community stakeholders and vice versa?*
- ★ *What are the spoken and unspoken tensions between different stakeholders and our organization?*
- ★ *What are the lessons learned from our previous experience working with these stakeholders? How can we most effectively address prior experiences of working together and/or tensions in order to move forward together?*



5. To close the activity, ask the group what new insights the discussion has flagged for them in terms of who the organization's allies, partners and targets are, and how those categories may have changed.
6. Thank participants for their thoughtful reflection. If the group decides to engage specific stakeholder groups differently as an outcome of the discussion, identify next steps. Set a date for completion and a process for how the group will communicate with and engage these new or existing stakeholders.



HANDOUT G: VAYLA-NO CASE STORY

Overcoming the generation gap in order for youth and elder leaders to work collectively is a constant issue that occurs in the AAPI community. This story is a teaching tool highlighting how environmental issues and Hurricane Katrina brought together both types of leaders to unite the community.

The Vietnamese community residing in Eastern New Orleans had been experiencing a generational and cultural divide between the elder community members and youth.

In accordance with the traditional community leadership structures, elders held much of the power and made decisions for the community without much input from the younger generation. Although they sponsored programs for youth, youth were not allowed to be part of the decision-making around program development and funding allocations.

VAYLA-NO (Vietnamese American Young Leaders Association of New Orleans) is a multi-issue youth organizing group that emerged to combat environmental racism taking place in Eastern New Orleans during the post-Hurricane Katrina reconstruction.

In February 2006, the mayor of New Orleans announced his intention to place a landfill in the New Orleans East community, less than a mile away from Village de l'Est, historically a low-income African American and Vietnamese American community. Known as the Chef Menteur C & D Disposal Site, the dumping site was chosen through an Executive Order without any community input. Community members protested and organized efforts to stop the toxic dumping of construction debris in their neighborhoods.

The crisis of the landfill both galvanized the entire Vietnamese community and created an opportunity for Vietnamese youth to play a role because language barriers prevented the elders from effectively organizing against the power structures that made the decision without community input. This was the first time the youth and elders were able to work together effectively to change the conditions of the community. The youth were able to build the bridge between their community and allies in greater New Orleans and, in collaboration with the elders, effectively created a campaign strategy to mobilize the community to protest the landfill.

All of these efforts led to the closing of the landfill and the end of a successful campaign. The Vietnamese community of Eastern New Orleans learned a valuable lesson from this success: multi-generational organizing is needed for the community to fight for justice.

Elder leaders and youth leaders have not traditionally worked together on a particular issue. In addition, the majority of the leaders tend to be male at both the youth and elder level. The youth leaders attended a community town hall where elders asked where were the youth in helping with the situation. Youth leaders addressed the situation for the first time by articulating that youth have always been opened to supporting but have never been given a real chance to do so. This was the first time where both sides actually openly confronted the generational obstacles that existed in the community publicly. In this particular case, an open space to have a dialogue or articulate issues was critical.

A real open and honest discussion was needed. The crisis brought elders and youth into the same room and created an environment for people to articulate their long held beliefs. Benefits to this approach were that it allowed everyone to speak their minds and articulate frustration. The challenge is that this environment does not often occur and exist and did so because of a crisis. It is not possible to always have the privilege of this space.

Now the generational divide has narrowed quite a bit but the elder community leaders are still wary of sharing community power with youth leaders. Although elder leaders have been much more considerate of soliciting concerns and opinions of the younger generation, they have not yet offered youth leaders a seat at the decision-making table.

This situation has taught VAYLA that it is possible to bridge divides and that youth have a valuable place in social justice work. Strengths such as education and language capacity can also be assets to the entire community. The organization continues to engage in discussion with elder leaders to eventually work collectively on a proactive campaign.

EXERCISE II: “THE POWER LADDER”

GUIDING QUESTION

How do we want to change relationships of power around us both within our organization and community?

PURPOSE & OVERVIEW



This exercise helps participants think more deeply about how their organization can better leverage its relationships and build its power.

In this activity, participants identify and analyze the critical power relationships that operate in the organization and in the community. The group then explores how to shift and change some of those existing power dynamics. *(Note: This exercise can be a follow-up to Exercise #9: Stakeholder Mapping)*

LEARNING OBJECTIVES



This exercise aims for groups to explore how to influence and dismantle the existing mechanisms of power, not just in society as a whole, but also within their own communities.



MATERIALS

- ✓ Large Post-it notes
- ✓ Large butcher paper or blank “Power Ladder” visual
- ✓ Markers / pens
- ✓ **Handout H: “Power Ladder”**
- ✓ Completed stakeholder map “Circles of Influence” from Exercise #9 (if available)



TIME

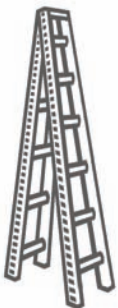
2 – 4 hours
depending on the group’s size and the depth of the dialogue



KEY TERMS

“Power”
“Power analysis”
“Stakeholder”

INSTRUCTIONS FOR FACILITATOR:



1. Introduce the exercise by explaining its purpose and process for the group. Discuss how the group thinks about power. In organizations, varying degrees of influence or “decision-making power” exist among individuals with different roles in the community and in an organization.
2. Refer back to your stakeholder map from *Exercise #9* (or if the group did not engage in that exercise, take 5-10 minutes to do a quick brainstorm of the organization’s primary stakeholder groups and write them on large Post-it notes).

3. Put each stakeholder on a large Post-it (include your current key players, allies and targets). Refer to Handout H to see where to place your stakeholder Post-its on the butcher paper with the blank power ladder.

4. Have the large group look back on the organization's mission, vision, and values again. Some questions to discuss during this section include:

★ *Do the power structures and power dynamics of the organization and with the community reflect how you describe your vision and values? If not, what needs to change?*

★ *How does the organization build an atmosphere of trust and mutual respect? How does decision-making get delegated? How do we listen and act on problems and conflicts?*

5. Ask the group to envision the future of the organization.

★ *Should any stakeholder groups shift levels on your power ladder as your organization becomes more intentional about its social justice work?*

★ *Who do we want to have a voice and the power in our organization and in our communities?*

★ *How do we continue to leverage our resources and knowledge with others? How do we continue to build dialogue and trust with the community?*

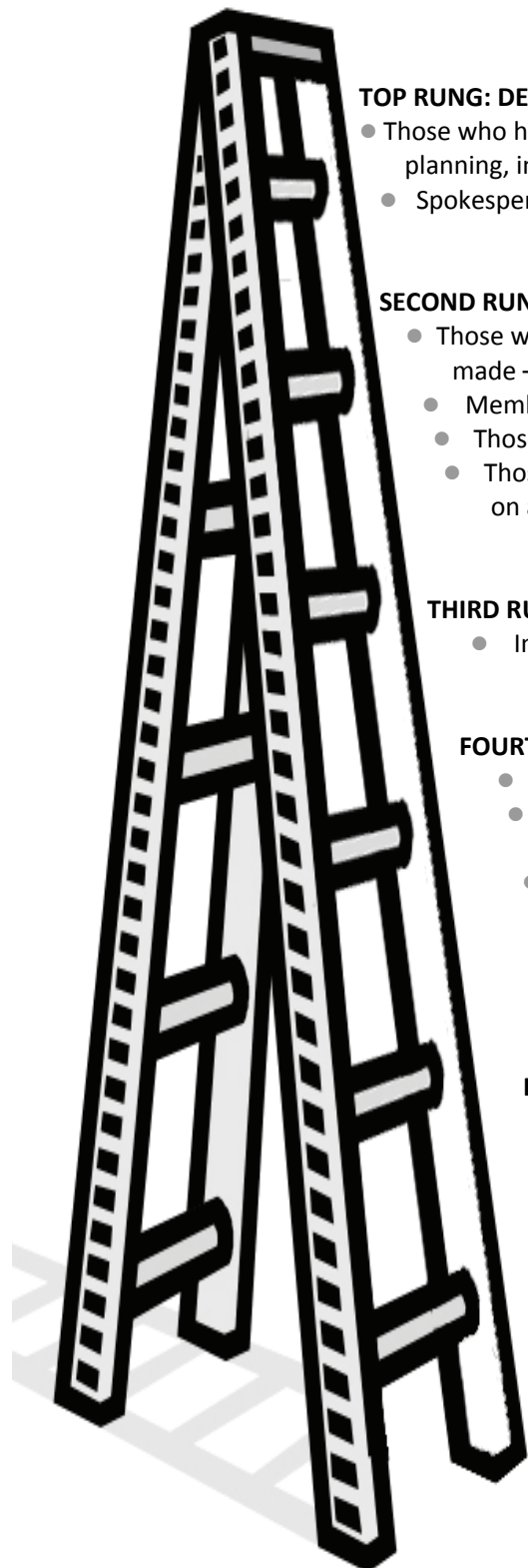
6. As a closing reflection, ask the group as a whole how power can be built up the organization's ladder? In other words, *how can our organization become more powerful? What structures or processes might help to achieve this?*

7. Thank participants for their thoughtful reflection. If the group decides to engage specific stakeholder groups differently as an outcome of the discussion, identify next steps. Set a date for completion and a process for how the group will communicate with and engage these new or existing stakeholders.





HANDOUT H: POWER LADDER VISUAL⁸



TOP RUNG: DECISION MAKERS

- Those who help control how organizational decisions get made – goal setting, planning, implementation
- Spokespersons for the organization

SECOND RUNG: ACTIVE PARTICIPANTS

- Those who give input for how organizational decisions get made – goal setting, planning, implementation
- Members of board or other governing body, advisory group, advocates
- Those engaged in activism in the organization
- Those with whom your organization closely partners, for mutual benefit, on a strategic and long-term basis (for example, key players & allies)

THIRD RUNG: EXISTING COLLABORATIONS, PARTNERSHIPS & NETWORKS

- Institutional and organizational partnerships that are limited in scope due to funding, a specific project or time-limited focus, etc.

FOURTH RUNG: EMERGING LEADERS

- Those who you are attempting to draw into the organization
- Those who possess expertise or power that is crucial for the organization to achieve its outcomes
- Those whose leadership or growth your organization has directly cultivated
- Those who volunteer for your organization in a limited capacity, such as for an event or a specific campaign
- Potential key partners

FIFTH RUNG: INFORMATION SOURCES

- Individuals who you consult or gather data from, such those who are part of focus groups, complete surveys, or who attend your community town hall meetings

SIXTH RUNG: RECIPIENTS & TARGETS

- People most directly affected by your organization's actions
- Those who receive services
- Those who attend your events / performances / workshops / trainings
- Those for whom you advocate, and most impacted by inequity

⁸ Adapted from "A Community Building Workbook" by the Asset-Based Community Development Institute, 2005.

EXERCISE 12: “ROOTING OUT ROOT CAUSES”⁹

GUIDING QUESTION

How do we understand and interpret the root causes of the issues that our organization seeks to address?

PURPOSE & OVERVIEW



This exercise asks participants to analyze how their strategies address root causes in order to help an organization deliberately set and prioritize its strategies on an ongoing basis.

This activity is a form of root cause analysis. The group embarks on a series of brainstorms to explore root causes of community problems. Then, participants relate and apply that analysis to the organization’s current strategies and programs.

LEARNING OBJECTIVES



This exercise aims to allow a group to examine its strategies and programs, leading to a deeper analysis of root causes of community problems and issues.



MATERIALS

- ✓ “Organizational Strategies Continuum” drawn on flipchart paper or copied onto handouts (📄 **Handout I**)
- ✓ Large “Organizational Strategies Continuum” drawn on butcher paper
- ✓ Markers/pens



TIME

1 – 2 hours
depending on
the group’s size



KEY TERMS

“Root cause”

INSTRUCTIONS FOR FACILITATOR:



1. Introduce the exercise by explaining its purpose and process for the group. Explain that the group will engage in 3 brief successive brainstorming periods in order to explore root causes of community problems and issues.
2. Begin with a 10-minute group brainstorm: What are the most important problems that our community faces? Encourage the group to be as specific as possible. As a large group, decide upon 5 top issues that are relevant to the organization’s work. Note to the group that the 5 issues are not definitively the most important ones. Rather, given limited time, these particular issues will help the group focus for the purposes of the exercise.

⁹ Adapted from “Power Tools: A Manual for Organizations Fighting for Justice” by SCOPE (Strategic Concepts in Organizing and Policy Education)



3. Continue by facilitating a second 10-minute group brainstorm: *“What are the root causes behind each of these problems?”* As a large group, read through all of the causes and eliminate those that reveal themselves to be symptoms or factors rather than causes, upon further discussion and reflection.

4: For the third 10-minute group brainstorm, pose the question, *“What are the factors that contribute to these problems and keep them from being solved?”* These are significant factors or mediating elements that the group feels are important.

5. Now have the group look at the organization’s current strategies, programs, projects or campaigns. Post the *“Organizational Strategies Continuum”* on a flipchart and explain the continuum to the group. Note where each strategy contributes to addressing one of the 5 root causes named earlier per the continuum. Emphasize that not only programs or strategies can or should be on the high end of the scale. This part of the discussion can be among the large group or in small groups.

6. Ask the group to report back, and post the ideas onto 1 large joint *“Organizational Strategies Continuum”* on butcher paper.

7. Facilitate a conversation about what has been shared.

- ★ Where do we see our various programs, strategies, or campaigns?
- ★ Reflect on the impact of each of the strategies. In some cases, a project in the “intentional” category may be just as powerful or impactful as another in the “sustainable” category, depending on how our organization has chosen our approach, how we define success, and the change that we want to create in our communities.
- ★ Why have we chosen to create our work from these particular approaches?
- ★ What does the visual reveal to us about our role in the social justice movement?
- ★ Are there any programs that participants think could or should shift? If so, how?
- ★ Are there large gaps in our strategies?
- ★ Are there factors that have been raised today that we haven’t previously considered as an organization?



7. Thank participants for their thoughtful reflection. If the group decides to revisit or reframe any part of your organization’s strategies and programs as an outcome, identify the next steps. Set a date for completion and a process for how the group will review and approve any changes to the work plan.



HANDOUT I: ORGANIZATIONAL STRATEGIES CONTINUUM

Awareness	Intentional	Strategic	Sustainable
<p>This program, project, or strategy does not address root causes, but it does treat one or more factors that contribute to the problem.</p> <p>OR:</p> <p>This program, project, or strategy helps to mitigate the problem(s), but it does not move toward the long-term solution.</p>	<p>This program, project, or strategy acknowledges the root cause(s) of the problem, but more analysis remains to be done.</p> <p>OR:</p> <p>This program, project, or strategy is an incremental step towards the long-term solution.</p>	<p>This program, project, or strategy begins to address the root cause(s) of the problem.</p> <p>OR:</p> <p>This program, project, or strategy represents a big step towards the long-term solution.</p>	<p>This program, project, or strategy directly addresses the root cause(s) of the problem.</p> <p>OR:</p> <p>This program, project, or strategy represents a breakthrough to achieving the long-term solution.</p>
<p>Example: Support group for teen mothers</p>	<p>Example: Reproductive health initiative to reduce the incidence of teen pregnancy</p>	<p>Example: Teen pregnancy prevention through health advocacy and education</p>	<p>Example: Cultural change through addressing challenges in young women's lives, such as initiatives targeted towards whole families or one-on-one mentorships</p>

EXERCISE 13: “ONE STORY, THREE FRAMES”¹⁰

GUIDING QUESTION

What core strategies will our organization employ to serve our role in working toward a common vision?

PURPOSE & OVERVIEW



This exercise helps participants examine the same problem presented from different perspectives in order to determine organizational approach.

In this activity, participants read through different versions of the same story and answer the questions about each.


LEARNING OBJECTIVES



This exercise aims to assist participants with identifying different organizational approaches to solving community problems.



MATERIALS

- ✓ Copies of  **Handout J**
- ✓ Flipchart paper
- ✓ Markers / pens



TIME

60 – 75 minutes
depending on the
group’s size



KEY TERMS

“Frame”
“Framing”

INSTRUCTIONS FOR FACILITATOR:



1. Prior to beginning this exercise, decide as the facilitator how to proceed in having the groups read the story in Handout J. One recommendation is for all small groups to receive Version 1 first and to complete those 3 discussion questions. Then, they can be given Version 2, etc. (*Note that 3 separate handouts need to be copied for this purpose.*)

A variation on this that would be appropriate for a larger group would be to divide into 3 smaller groups and to give a different version of the story to each smaller group. After concluding the small group discussions, have the large group begin their report-back by sharing their version of the story so that everyone hears all 3 versions at the end.

¹⁰ Adapted from “Introductory Activities: Worldview, Frames and Themes” by Grassroots Policy Project
www.grassrootspolicy.org

2. Explain the purpose and process of the activity to the group. Share the meaning of the word “framing” in this context. Framing happens in the media all the time. One can relate very different stories about the same event or problem depending on which aspects are emphasized and which details are either included or omitted.



Framing accomplishes the following:

- ★ **Relates a story to what the issue or problem is, what the causes are, and what the solution(s) may be.**
- ★ **Draws upon assumptions, stereotypes and themes in society.**
- ★ **Implicitly or explicitly reinforces a set of values.**
- ★ **Tends to serve a set of interests.**

3. Divide the group into small groups of 3-4 people and instruct them to read the “*One Story, Three Frames*” handout or handouts. Direct groups to discuss the questions that follow the story. Allow 15-20 minutes for discussion before reconvening the group.
4. Come back together as a large group and ask groups to share all 3 versions with each other. As a group, reflect and discuss how the same story is framed several different ways. Then ask volunteers to share what came up in their discussions.

Pose these follow-up questions to the large group:

- ★ *How do we generally frame our work?*
- ★ *What things do we emphasize in our own approach?*
- ★ *How does understanding our framing help us focus and prioritize?*



5. Thank participants for their thoughtful reflection. If the group decides to revisit or reframe any part of your organization’s strategies and programs as an outcome, identify the next steps. Set a date for completion and a process for how the group will review and approve any changes to the work plan.



HANDOUT J: ONE STORY, THREE FRAMES

Version 1:

A 16-year-old Southeast Asian pregnant minor was admitted to Central Hospital last night where she was treated for shortness of breath. The girl, a resident from the South End, is 28 weeks into her pregnancy. As a minor, very few details were released, however, a hospital official, who spoke on condition of anonymity said that her ultrasound revealed that the fetus will likely have birth defects.

Questions about Version 1:

1. *What is the root cause of this problem?*
2. *What is the solution?*
3. *Could your organization provide support in some way? Why or why not?*

Version 2:

A seven-month pregnant teen was treated and released from Central Hospital yesterday after being found unconscious in her apartment hallway by a neighbor. Tenants said that repeated requests for improved ventilation in the apartment building have been ignored by the landlord, Henry Brown. Brown claimed that the problem lay with tenants' who continue to smoke in their apartments, despite the new health ordinances that went into effect at the beginning of the year forbidding smoking within public and rented living facilities. "I spend half my time dealing with maintenance issues caused by cigarette ash—burns on the counter tops, carpets that need replacing, etc." Brown says.

Questions about Version 2:

1. *Does your thinking about the causes and solutions shift after reading this version?*
2. *Could your organization provide support in some way? Why or why not?*

Version 3:

Toxic fumes overcame a seven-month pregnant teen as she climbed eight flights of stairs to an apartment she shares with her family yesterday. This young woman is the fortieth person from the Southern part of the city to be treated for serious breathing difficulties with no prior history of such. Health officials say that this neighborhood in particular seems to be susceptible to toxic fumes emanating from a local nuclear power plant.

Questions about Version 3:

1. *In this version, has your perspective on the root cause of the problem and potential solution altered?*
2. *Is there a role your organization could play in making change?*

EXERCISE 14: “QUESTIONS FOR STRATEGIC DECISION MAKING”

Social Justice Organizations are often asked to respond to larger events and actions in community and in solidarity with others. For some organizations, this work comprises a disproportionate amount of organizational resources to participate given the organization’s capacity. Connected to your organization’s TOSC development, use this matrix to assist you in aligning non-planned involvement/support to your organization’s larger goals and vision.

Questions for Strategic Decision Making Based on Current Capacity <i>Questions you might consider prior to taking on new work are based on your organization’s BOAT results and primary standing in the Continuum of Organizational Social Justice Capacity:</i>			
AWARE	INTENTIONAL	STRATEGIC	SUSTAINABLE
★ How can our organization help bring awareness to this issue?	★ What is our stance on this issue?	★ Taking into account our organization’s capacity, what level of organizing will we engage in?	★ How can we effectively build coalition that includes local, regional and national perspectives?
★ What are ways we can get involved?	★ How can we educate our community about our position?	★ How can we connect this issue to our current strategies?	★ How is our strategy addressing the root causes of this issue?
★ What opportunity does this present to us organizationally?	★ What impact will taking on this issue have on us organizationally (Identity, operationally, staff, volunteer and resource capacity)?	★ Who are our strategic allies on this issue and what do we want to achieve with them?	★ Thinking beyond this issue, how are we helping to sustain infrastructure and community capacity to address root causes?
★ What capacity do we have to dedicate to this work?	★ What capacity do we have to dedicate to this work?	★ What capacity do we have to dedicate to this work?	★ What capacity do we have to dedicate to this work?

VI. DEBUTING YOUR ORGANIZATION'S THEORY OF SOCIAL CHANGE

OVERVIEW

Congratulations! You have arrived at the culmination of many processes that have uncovered various facets of your organization and community knowledge. Hopefully, this process has produced more than a pretty document, but an organizational tool that communicates:



- ★ **A clear and testable hypothesis about how change will occur**
- ★ **A visual representation of the change you want to see in your community and how you expect it to come about**
- ★ **A blueprint for evaluation with measurable indicators of success identified**
- ★ **An agreement among stakeholders about what defines success and what it takes to get there**

At the core, your organization's Theory of Social Change should have a lot of practical application as a framework to check milestones and stay on course.

This is particularly relevant in instances of leadership transition, or to continue to assess the organization's role in the movement over time and in different political climates.

The Theory of Social Change can provide your organization's board and staff with a mechanism that helps guide decision-making at all levels and create a guide post for intentional evaluation.

The knowledge that you will have gained from going through the process of creating your organization's Theory of Social Change can serve as the foundation for your organization in framing issues of social inequity and be the platform for you to communicate your organization's role in addressing these issues.

Practically speaking, your TOSC can be a powerful leveraging tool to policymakers, funders, and other important stakeholders. Lastly, in the context of building a social justice movement, the process of creating a Theory of Social Change will assist your organization in identifying the role it plays in the social justice movement.

On the following page, we have provided a TOSC Template for you to input the outcomes of your TOSC process into a single document that tells your organization's story.

(When completing this template, you may find it helpful to take elements from discussions and exercises completed during your organization's TOSC process and apply them to this document.)

VISION STATEMENT:

VALUES:

-
-
-

GOALS:

- 1.
- 2.
- 3.
- 4.

COMMUNITY:
assets challenges

ORGANIZATION:
assets challenges

STRATEGIC ACTIVITIES:

OUTPUTS:	SHORT-TERM OUTCOMES:	IMPACT:
		ORGANIZATIONAL:
	LONG-TERM OUTCOMES:	COMMUNITY:
		SYSTEMIC:

VII. GLOSSARY OF TERMS



Clients: The people who receive services from a nonprofit service organization.

Constituents: Refers mainly to an organization's clients, but can also include the broader community of potential service recipients and their families, as well as other stakeholders including alliances and coalitions.

Frame: A lens or viewpoint that brings certain aspects of a situation into focus while under-emphasizing or even distorting others.

Framing: The way that an individual or group uses their worldview to bring meaning to an issue or social problem or to convey a certain message.

Goal: The result or achievement toward which effort is directed; aim; end.

Justice: A concept of moral rightness based on ethics, rationality, law, natural law, fairness and equity; concerns the proper ordering of things and persons within a society.

Key stakeholders: Those who have significant responsibility, importance, support and/or influence on the organization.

Logic model: A planning framework that offers a tool for describing work in an organization. Typically includes inputs, activities, outputs, and outcomes.

Milestone: A significant event or stage; progress.

Organizational values: Core guiding principles for organizational processes, systems, decision making, staff support, and for an organization's image in the community.

Outcome: The final product or end result.

Power analysis: A tool to understand who has voice and direct/ indirect decision making power, and how to alter the balance of power in a group, organization, or community.

Power: The authority or force to determine an outcome. Refers broadly to any ability to effect change or exert control over things or people, subjects or objects.

Root cause: An underlying factor or condition that create persistent community problems.

Stakeholder analysis: A strategic planning tool to help an organization identify the issues, needs and challenges of the people and institutions that are critical to the success of the organization's social justice work.

Stakeholder: A person, group, organization, or system who affects or can be affected by an organization's actions.

Strategic planning:

An organization's process to define its strategy or direction and make decisions on allocating resources to pursue this strategy. Scope typically ranges from 1 to 5 years.

Talking circle: A method used by a group to discuss a topic in an egalitarian and non-confrontational manner. Group members sit in a circle and actively listen to each other.

Theory of social change:

Explains how your organization plans to accomplish its mission and vision. From an organizational process standpoint, a Theory of Social Change generally follows the creation of an organizational vision, mission, and values statements, and precedes the creation of a strategic plan.

Values: Beliefs or judgments about what is worthy, important or desirable that are reflected in individual and community behavior.

Vision statement:

An articulation of your hopes and aspirations; the ideal future state.

Worldview: A framework of ideas and beliefs through which an individual interprets the world and interacts with it.

VIII. REFERENCES



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IX. EVALUATION OF THIS GUIDE

Your name (optional) _____

Your organization (optional) _____

1. Which exercise(s) did your group use from this guide?

2. Describe how you used this guide. What were your goals for your meetings, workshop or dialogues? Who was involved?

3. What changes, insights, or “a-ha moments” happened during or after the meeting(s)?

4. Which part(s) of this guide did you find most useful and why?

5. As a facilitator, did you feel comfortable leading these exercises? Why or why not?

6. Did you make any adjustments or adaptations to the exercises that you used? Please describe.

7. What recommendations do you have for changes or additions to this guide?

We would appreciate your feedback! Please return this form by e-mail, fax, or postal mail to:
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“CHRONICLES OF CHANGE”

AN ORGANIZATION’S GUIDE TO A THEORY OF SOCIAL CHANGE



National Gender & Equity Campaign,
Asian Americans/ Pacific Islanders in Philanthropy
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