RWJF INVESTMENTS IN COMMUNITY ORGANIZING

A Baseline Analysis of 15 Years of Programming and Grantmaking

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In Our Backyards

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Maisha E. Simmons, RWJF

"CCHE was created as a breakthrough investment in systemic change led by the people and communities most affected.

The Praxis Project

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EXECUTIVE SUMMARY

The Robert Wood Johnson Foundation (RWJF) holds that creating a society in which all people have a fair and just opportunity to live a healthy life is core to building a Culture of Health, and that achieving health equity requires removing social and economic obstacles to health.

RWJF commissioned a report in February 2018 "to develop a baseline understanding of RWJF's work to date in supporting community power-building, utilizing key terms and language from programs and projects as a launching point." This public version of the report offers insights from the baseline analysis for people outside of RWJF with interest in the topic.

The report comprises a review of more than 200 documents spanning 74 grants directed by 39 separate grantee organizations over a period of 10 years. In addition, four current and one former RWJF program officer participated in telephone interviews, sharing their perspectives on the Foundation's experience in supporting community organizing.

A Note about Language

The charge from RWJF called for an analysis of the Foundation's "community power-building" efforts with an emphasis on key terms and language.

RWJF and grantee documents more frequently used "community organizing" to describe the work, however, so this report reflects the language expressed in the grants. Nonetheless, further discussions within RWJF about the distinction between power-building and community organizing will yield needed clarity on these concepts. Other terms that warrant additional exploration include "power," "advocacy," "empowerment," and "capacity."

RWJF Investments in Community Organizing: Issues and Types of Grantee Organizations

Major Issues Addressed

Grants reviewed span a variety of the Foundation's priorities. Projects covered topics such as tobacco cessation, access to care, and preventing childhood obesity. Newer areas of focus include school discipline and worker rights. Some investments—infrastructure support such as leadership development and internal operating system enhancement, creation of tools, and training and technical assistance—cut across substantive issues.

RWJF has a history of investing in promoting informed policy discussions and policy decisions. Many of the earlier projects reflected that history:

"Sometimes the advocacy strategy involved power-building or community-building…but a lot of it was very focused on policy wins."—Lori K. Grubstein, MPH, MSW, MPA, RWJF program officer

As RWJF launched its investments in preventing childhood obesity, its grants addressing obesity supported a wider range of community organizations. Some of these multi-issue organizations focused on justice and equity, and RWJF's support enabled them to incorporate health into their core missions.

"Drawing links between childhood obesity and the related social justice work that community-based organizations are doing helps the organizations focus on their core mission."— RWJF report on Communities Creating Healthy Environments.

Organizations Funded

Most grantee organizations are based in large cities along the eastern seaboard (23 grantees) or in California (6 grantees) although many passed funds to community organizations outside of those urban centers. Funding ranged from several million dollars for large national programs such as Voices for Healthy Kids to a few hundred thousand dollars for smaller organizations such as Tandeka, LLC.

The Foundation's move to a Culture of Health accelerated the development of partnerships with non-health organizations and expanded the nature of RWJF's partnerships. Through its partnership with the NAACP, UnidosUS (formerly, National Council of La Raza), Faith in Action (formerly PICO National Network), and the YMCA, for example, RWJF has increased its engagement with the extensive on-the-ground networks of the members and constituents of these organizations.

Community Organizing Activities Funded by RWJF

Program officers noted that RWJF's early approaches to supporting community organizing tended to be more *ad hoc* than deliberate, as design and funding decisions were made somewhat independently by the relevant staff team. Senior program officer Maisha E. Simmons, MPA, recalls that the strategy "…really was based upon thinking about the work for the team."

Community organizing grants funded key activities including:

- *Infrastructure support*, such as leadership development, internal operating system enhancement, research tool development, and training and technical assistance

- *Coalition-building and partnership development*, such as supporting existing coalitions, promoting new partnerships among grantees, and greater involvement by RWJF with funder and other collaboratives or partnerships

- *Convening* cross-site meetings of project staff; national meetings involving Foundation staff, project staff, and program participants; and other meetings involving funders and community leaders

- *Evaluation*, most often in-house surveys to gauge progress and effectiveness. Five projects featured evaluations conducted by external evaluators.

Themes

Three over-riding themes emerged from the document review and interviews:

- A wide array of terms—advocacy, voice, empowerment, capacity, and others— used in RWJF and grantee documents makes it challenging to define or even describe community organizing. Documents did not include definitions of these terms. The ambiguity is understandable given RWJFs historical focus on policy change over community organizing, and the independence of the teams in designing projects.

- Different kinds of organizations, such as youth organizing agencies and digital and mobile technology agencies have joined the RWJF family of grantees.

- There has been only limited attention to evaluations conducted by organizations external to the grantee organizations themselves. Most evaluations were in the form of surveys and feedback solicited by the grantee organizations from program participants.

Lessons

The study yielded strategic and nuts-and-bolts lessons for RWJF.

Lessons for Strategy

- A clear expression of principles and vision helps grantees both move toward bolder outcomes and remain grounded in meeting short-term objectives.

- Engaging grantees that have organizing expertise and community credibility, even if they do not have expertise in health, benefits grantees and funders alike. Grantees realize benefits from the wealth of data available from funders and from the training, technical assistance, and convenings that grants support. Funders gain insights into challenges and successes community organizations face as they implement changes within their diverse policy and political environments.

- Improvements in core organizational infrastructure and operating systems can yield lasting benefits that facilitate sustainability of community-based groups.

- Supporting communities to organize and succeed involves flexibility in grantmaking and willingness to cede some authority in decision-making.

- Effective community organizing involves balancing approaches that work from inside a formal system as well as from outside of it; and approaches that focus both on incentives (the "carrots") and on opposition (the "sticks").

- The unique ability of funders to bring people together is a major contribution to the field of community organizing and should not be underestimated.

- Participating in funder collaboratives has been enlightening for RWJF. For example, through its involvements in collaboratives focused on bullying, parents' organizing, and youth leadership, RWJF has deepened its understanding of these issues.

Nuts and Bolts Lessons

- Power mapping—a visual tool and process by which community members map relationships among actors in a geographic location in order to build alliances and identify people most likely to promote social change—proved to be a valuable resource for understanding and negotiating power relationships in a community.

- Projects that require grantees to collaborate with one another help them learn about the multiple dimensions of health and well-being.

- Regular interaction between grantee staff and program officers is highly valued and appreciated by grantees.

- Intermediary organizations—organizations that direct initiatives on behalf of funders—provide invaluable coherence to complicated projects. The headquarters of the intermediaries covered by this analysis tended to be clustered in large coastal cities and were underrepresented in other areas of the country.

- Working with community groups to help them plan is likely to enhance project progress and develop planning and other skills among staff in those groups.

- Involving residents who are engaged with community organizations in all aspects of a project is essential to success and to developing capacity among community members and organization staff.

- Increased attention to evaluating community organizing initiatives has the potential to enhance understanding of the initiatives and to advance the organizing field.

Suggestions and Recommendations

The analysis suggested actions for RWJF to consider as it formulates its community organizing agenda. Some of these actions might be useful to others as well.

- Develop shared understanding about key terms and when to use them. This includes developing an understanding of how community organizing relates to broader community power-building. Attention to developing shared understanding of other terms such as advocacy, empowerment, capacity, and voice is also warranted.

- Develop a theory of change for ways community organizing and broader systems change efforts of community power building can support organizational priorities.

- Invest in the development of emerging and existing leaders who can advance the field of community organizing.

- Give some priority to funding research about on-the-ground activism, including qualitative studies of the processes by which power is created and quantitative studies of the outcomes.

RWJF INVESTMENTS IN COMMUNITY ORGANIZING

A Baseline Analysis of 15 Years of Programming and Grantmaking

INTRODUCTION

The Robert Wood Johnson Foundation (RWJF) holds that creating a society in which all people have a fair and just opportunity to live a healthy life is core to building a Culture of Health, and that achieving health equity requires removing social and economic obstacles to health. This belief has prompted staff to look more intentionally at ways to accelerate the Foundation's efforts to support community organizing and to build power within marginalized communities whose residents are especially affected by poverty, crime, and other challenges.

One element of that examination involves mining lessons from past investments. RWJF commissioned this paper in February 2018 "to develop an internal baseline understanding of RWJF's work to date in supporting community power-building, utilizing key terms and language from programs and projects as a launching point…" Drawing from that baseline analysis, this public-facing version of the study is offered to others outside of RWJF who might find it useful as well.

Key learning questions for this baseline assessment include:

- What kinds of organizations did RWJF support in this work?

- What are the issues related to a Culture of Health, health equity, and social determinants of health that RWJF has explored with low-income communities and communities of color?

- What are the practices and activities utilized by RWJF and grantee organizations to engage with low-income communities or communities of color?

- What themes and trends emerge from this work?

- What lessons can RWJF take from its investments in community organizing?

- What actions might RWJF take to enhance its ability to invest and guide in this field?

Methodology

RWJF provided more than 200 project précis, grant proposals, and annual and grantee reports from projects that appeared to have included community organizing activities. These documents covered 74 grants directed by 39 separate grantee organizations. The earliest project reviewed started in December 2004, and the most recent began in September 2017.

See Appendix 1 for a list of grantees, a brief description of their missions, and the titles of their projects included in this review.

In addition, four current RWJF program officers and one former program officer participated in telephone interviews covering:

- The thinking underlying early RWJF investments in community organizing

- Reflections on specific programs/projects in each program officer's portfolio

- Key ingredients of promising or effective community organizing strategies

- Activities undertaken by grantees during the grant period

- Perspectives on the use of mobile technology and social media as organizing tools

- Mistakes or omissions that hold lessons for the future

- Examples of particularly successful programs or projects

- Additional thoughts and reflections.

See Appendix 2 for a list of people interviewed.

A Note about Language.

The charge from RWJF called for an analysis of the Foundation's "community power-building" efforts, with an emphasis on key terms and language.

RWJF and grantee documents more frequently used "community organizing" to describe the work, however, so this report reflects the language expressed in the grants. Nonetheless, further discussions within RWJF about the distinction between power-building and community organizing will better serve RWJF and grantees going forward. Other terms that warrant additional exploration include "power," "advocacy," "empowerment," and "capacity."

Limitations

The report is not intended to be a full compendium of RWJF grantmaking related to organizing and is based only on information included in documents generated by RWJF or grantees and on the interviews. Some projects may have closed or significantly changed since the documents were written. Some relevant projects might not be reflected in the review. RWJF initiatives such as The County Health Rankings & Roadmaps, as well as programs featured in Culture of Health prize-winning communities, could be incorporated in the future.

The examples noted throughout the report are simply illustrative and do not begin to represent the range of work by any grantee or on any topic. Attempts were made to incorporate as many grantees and projects as possible, and to give adequate weight to smaller, less well-known projects.

Report Layout

Part I provides background information about the period covered by the grants, the issues they addressed, and the types of organizations that received funding.

Part II summarizes the kinds of activities grantees undertook.

Part III notes some high-level themes that recurred across the projects.

Part IV offers lessons drawn from the review.

Part V features suggestions and recommendations that emerged from the analysis.

A short **Conclusion** ends the report.

Two Appendices provide supplementary information.

Acknowledgements

PART I

RWJF INVESTMENTS IN COMMUNITY ORGANIZING: ISSUES AND TYPES OF GRANTEE ORGANIZATIONS

This section provides an overview of the issues addressed by grants featuring community organizing; the size, dates, and geographical distribution of the grants; and the kinds of organizations that received funds.

Major Issues Addressed in Projects Involving Community Organizing

The grants reviewed span a number of the Foundation's long-standing priority health issues—promoting tobacco cessation, improving access to health care, and preventing childhood obesity. More recent grants (starting in about 2010) cover additional issues such as school discipline and worker rights, and stipends under an RWJF leadership development program. Some grants supported activities to build leadership, management, finance, and other systems within key grantee agencies.

Sometimes, grantees applied the expertise they developed in addressing one issue to addressing another:

"...by the end of the program...many of them [grantee organizations] ... were focused on improving their communities, working on a number of important social issues, and tobacco was just one of them." *–Marjorie A. Paloma, MPH, RWJF senior director-program*

Coverage

Many of the early documents reviewed suggested a focus on creating and communicating evidence to inform policy that would promote access to health care. These projects took a broad-stroke approach to educating stakeholders, policymakers, and consumers, and focused less on bottom-up organizing.

A 2007 RWJF project précis for **Consumer Voices for Coverage**, an initiative to establish state-based consumer health advocacy networks in 12 states, for example, reads, "This program increases the ability of state-based consumer groups to reform health care coverage."

"Sometimes the advocacy strategy involved power-building or community-building...but a lot of it was very focused on policy wins."—Lori K. Grubstein, MPH, MSW, MPA, RWJF program officer

RWJF's language and approach to the issue of coverage evolved over time, however. Précis from the first and last in a series of grants to **Faith in Action** (formerly PICO National Network) offer one example of this evolution:

- A 2009 précis describes the project as seeking "to broaden public support for comprehensive health care coverage...", and then

- A 2017 précis describes the work as mobilizing "faith-based communities...in an effort to build a Culture of Health through community organizing."

One national program, **Tobacco Policy Change** (2004), was an early harbinger of this evolution. The program worked intensively with low-income and Native American communities, and with communities of color, those most affected by tobacco. Building on experience with prior broad-stroke programs (e.g., SmokeLess States), RWJF staff solicited proposals from agencies that had credibility within their communities even if they lacked expertise in health. Groups that had worked on safety, Main Street redevelopment, rural health, and housing received grants under this program.

"The national lung, cancer, and heart associations had received 99 percent of the grants in SmokeLess States, and Tobacco Policy Change started with the same grantees. But by the end of the program, the grantees were not mainstream tobacco control organizations. Many of them were not one-issue organizations."—Marjorie A. Paloma

Childhood Obesity

RWJF's significant and long-term investments in reducing the epidemic of childhood obesity, an epidemic that overwhelmingly affects and harms low-income communities and communities of color, engaged the Foundation more directly in strategies aimed at promoting justice and equity.

As the Foundation evolved to focus more explicitly on inequity (and later, on building a Culture of Health), grant documents began to feature words such as "justice," and "rights." A project précis for **Communities Creating Healthy Environments (CCHE)**, a national program tackling the challenge of childhood obesity through community organizing and policy organizing, reads in part, "In 2008, RWJF funded The Praxis Project to create CCHE to apply the principles and practices of community organizing and social justice to reversing childhood obesity in communities of color."

"CCHE was created as a breakthrough investment in systemic change led by the people and communities most affected."—Report from The Praxis Project

CCHE, established within the Foundation's childhood obesity team, accepted proposals from organizations that defined themselves as concerned with social justice, and required that members, staff, and boards of directors of site grantee agencies be people of color. While CCHE sought to reduce childhood obesity, it did so by connecting obesity to existing social justice priorities of funded organizations.

"Drawing links between childhood obesity and the related social justice work that community-based organizations are doing helps the organizations maintain focus on their core mission."— RWJF Progress Report on Communities Creating Healthy Environments

Community organizing language continues to appear in more recent grants aimed at reducing childhood obesity. A 2011 project précis for a grant to the **Funders' Collaborative on Youth Organizing** indicates funds will be targeted to groups that "have a strong track record of organizing youths toward successful policy advocacy...and that meaningfully integrate youth leadership in decision-making, staffing, and advocacy work."

New Partnerships

RWJF has traditionally sought to develop partnerships with other health organizations. As RWJF and grantees began to understand that health problems such as lack of access to care and obesity are human rights and justice issues as well as health concerns, they began to think more deeply about the underlying forces that drive health status, and the new kinds of relationships required to combat those forces.

The Foundation's move to a Culture of Health accelerated this trend and has changed the nature of many RWJF partnerships. In particular, RWJF has become more interested in reaching organizations that may not view themselves as health-focused and has invested in developing core capacities within those organizations.

One type of new partnership is with large national civic or faith organizations that have chapters, members, and volunteers across the country. Strong connections with these organizations give funders a wider and deeper reach into low-income communities and communities of color. At the same time, these organizations benefit from having access to foundation-funded research, policy analyses, and other resources that their members can use in communities.

Through its partnership with the **National Association for the Advancement of Colored People** (**NAACP)**, for example, RWJF has increased its presence in the on-the-ground work of the 500,000 NAACP members across its 2,200 chapters. The NAACP is well-known for a range of civic, civil rights, and other activities to promote justice and opportunity in communities. It is not generally viewed as a significant player in health, however, and its connection to RWJF enables it to include a health agenda in its work. Partnerships such as these help funders to better understand the most important and pressing issues facing communities across the country.

"This partnership would represent an historic relationship between the nation's oldest civil rights organization and the largest funder of health initiatives."—A report from the NAACP

Existing and emerging partnerships with other national organizations with local chapters, offices, or affiliate organizations such as **Faith in Action**, the **YMCA**, and **UnidosUS** (formerly, National Council of La Raza) create additional opportunities for funders to become a stronger presence in communities. The **Funders' Collaborative on Youth Organizing** offers another example of how partnership arrangements have evolved from funding specific activities to investing in building the core capacity of community agencies:

- A 2011 précis notes the issuance of grants "to a cohort of eight to 12 youth organizations to address childhood obesity..."

- A 2013 précis calls for "an infrastructure to support local youth-organizing groups and their networks in developing campaigns for policies supporting healthy schools and communities."

These new relationships are understood to be essential to achieving a Culture of Health, and they contain challenges and opportunities for everyone involved. The Lessons and the Suggestions and Recommendations sections of this report address some of those challenges and opportunities.

Types of Organizations Funded for Community Organizing Activities

Funding for some multiyear national programs—**Voices for Healthy Kids**, a program to make it easy for all children to eat healthy foods and be active, and **Forward Promise**, a program to strengthen communities that raise and empower boys and young men of color—totaled several million dollars, Other projects, such as creating the RWJF Culture of Health Lab at **Civic Hall** and establishing an **Advocacy Academy** at Tandeka, LLC**,** received mid-level grants in the range of a few hundred thousand dollars. Fellowship grants under one of the Foundation's national leadership development programs were in the range of $125,000.

Notably, most grantee organizations are based in large cities along the eastern seaboard (23) or in California (6). Many of these organizations pass funds to community organizations, evaluators, and

technical assistance consultants, so the geographic distribution of funds is broader than that suggested by grantee addresses. Nonetheless, RWJF funds appear disproportionately allocated to organizations with headquarters located in just two regions of the country.

Some grantees, such as the **American Heart Association** and the **NAACP** are large national organizations with members, chapters, or affiliates in multiple states. Others, such as **Tandeka, LLC** and **Assisi House, Inc**., are small, and focus on one region. Groups such as the **Center for Digital Democracy**, **Enactus**, and **DoSomething.org**, through their emphasis on digital technology as an influence on behavior and as an organizing tool, have a wide reach into communities of young people and people of color.

Developing logical categories for these organizations proved challenging, as most perform a range of activities and deliver an array of services. For the purpose of this report, grantee organization categories include:

- **National Academic, Policy, or Consulting Organizations**
  Organizations with expertise in research, policy development, or consulting services.

- **Coalitions**
  Entities comprising multiple organizations, supported with a legal structure, staff, etc.

- **Local Faith Institutions**
  Organizations that deliver social services through a faith-based framework.

- **Intermediaries that Provide Technical Assistance**
  Organizations that receive and pass funds to consultants, service providers, evaluators, or others; provide guidance to sites; and serve as the link between a funder and community organizations.

- **National Organizations with Members, Chapters, or Affiliates**
  Organizations with a presence across the country through individual or organizational memberships, chapters, or affiliates.

- **National Networks of Community Organizing Groups**
  Organizations with majority local affiliates that specifically use grassroots organizing to engage low income and communities of color around multi-issue programs.

- **Technical Assistance Providers**
  Organizations that provide specialized assistance based on requests from constituents.

PART II

ACTIVITIES UNDERTAKEN BY RWJF AND GRANTEES

This section summarizes RWJF's evolution in grantmaking and the major activities undertaken by grantees in the reviewed projects.

An Evolution in Grantmaking

Program officers noted that RWJF's early approach to funding community organizing activities was generally more *ad hoc* than deliberate. Perceptions of community organizing probably varied by the team in charge of the grant or initiative, and the decision to incorporate organizing into grants was generally made within the team.

Reflecting on his early tenure at RWJF, former senior program officer John Govea, JD, MPH, observed, "RWJF was a different place…There was a lot of evolution over the ten years I was there…There wasn't necessarily that much communication among the teams, even though the staff many times would sit on two teams."

Citing earlier RWJF work in tobacco control, Govea continues, "Advocacy from the Foundation's perspective was very much top down," so RWJF staff "found that in communities of color, there wasn't the same impact because those communities had never been engaged in the process, and so it was kind of an after-the-fact thing to engage groups to work on that issue."

Govea characterizes the RWJF philosophy in the earlier years as "*for* those communities rather than *with* those communities…There wasn't a cross-foundation discussion of anything like that."

"Our community organizing work has been approached in a more *ad hoc* way," according to Jennifer M. Ng'andu, managing director of Healthy Children, Healthy Weight. "I don't necessarily think…I don't even know if we define community organizing in the same way across the institution…I'm not sure there is a consistent theory of change about what community organizing enables in terms of achieving a Culture of Health."

Senior program officer Maisha E. Simmons, MPA, agrees that while "It [community organizing] was an intentional part of the strategy…I would not say there was an outside directive that this is something we needed to do. It really was based upon thinking about the work for the team.

The introduction of the goal to reverse the epidemic of childhood obesity seems to have sparked a cross-team, Foundation-wide framework for obesity-related grantmaking. That framework featured a larger multidisciplinary agenda for building the capacity of vulnerable communities to take the lead in identifying needs and solutions.

"Childhood obesity opened up this door of really working with social justice organizations. RWJF was not going to reach its goal unless it reached low income communities and communities of color, and that gave us the opening."—John Govea

Activities Supported

Infrastructure Support—Leadership Development, Internal Operating System Enhancement, Tools, and Issue Training and Technical Assistance

Infrastructure support includes developing leadership capacity within an organization as well as providing expertise to guide improvements in operating systems such as information technology, finance, reporting, and evaluation. The goal is to help the organization become more robust and sustain over time. Infrastructure support is not connected to a particular programmatic activity.

"I think it could be a model for how we think about working with organizations as an institution, as opposed to thinking just about specific programmatic strengths."—Maisha E. Simmons

Following are some examples of investments in infrastructure:

- **Leadership Development**

  The **Advocacy Academy** created by Tandeka, LLC**.** addressed the weak advocacy infrastructure in the South. An eclectic group of power-holders from small towns in Mississippi and Alabama received "Southern sensitive" training in power dynamics, organizing, constituency-building, media, and other skills.

  "One of the organizers...decided to run for office against a four-term incumbent...She was able to get the incumbent into a run-off and eventually won the election."—Final Report from Tandeka, LLC.

- **Internal Operating Systems**

  RWJF investments in **UnidosUS, NAACP,** and **In Our Backyards** (known as **ioby**) offer examples of recent efforts to build the capacity of organizations whose members and constituents are essential to building a Culture of Health.

  "In recent years, RWJF began a new strategy of engaging in strategic partnerships with large national organizations that shared the Foundation's mission and values, and that the Foundation felt could play a role in building a Culture of Health in the U.S." –Project Précis for a grant to UnidosUS

  After issuing multiple grants to **UnidosUS** for activities to increase access to health care among Latinos, RWJF provided two years of general operating support for the organization starting in 2017. Areas of priority include improving communications, messaging, and dissemination functions, and providing more robust support for UnidosUS' work at the state and regional levels.

  A strategic planning process concluded that the **NAACP** needed enhanced telephone, computer, video, and database tracking systems. Other priority areas were building leadership capacity and strengthening youth engagement across chapters. Speaking of RWJF's investments in NAACP, senior program officer Maisha E. Simmons asks,

  "How do we leverage the assets of a 100-plus year-old organization that is completely dedicated and committed, and [how do we] think about what it means in our partnership with it to build a Culture of Health?"—Maisha E. Simmons

  In Our Backyards is a smaller organization that provides crowdfunding and other support to mobilize neighbors to become powerful citizen leaders. The infrastructure grant from RWJF allowed ioby to hire business and website consultants who helped ioby revise its economic model, re-launch its web platform, and better support its constituent

neighborhood leaders and donors. These enhancements significantly increased donations received, projects executed, and revenue from fees, according to ioby staff.

- **Tools to Guide Research and Practice**

  Grassroots Change, a project of the Prevention Institute "advocates a fundamental change of approach...by moving away from top-down decision-making to a model that favors grassroots leadership." Two grants from RWJF enabled Grassroots Change to develop fact sheets, case studies, and how-to guides in building a grassroots movement.

  With a special emphasis on preemption (a rule of law dictating that when federal and state laws conflict, the federal law overrules, or preempts the state law), Grassroots Change also created "Protecting Local Control: A Research and Messaging Toolkit."

  CCHE and the **Advocacy Academy** created templates and tools to help community residents understand the complex power relationships in their communities. Sites participating in CCHE used this power-mapping tool as the basis for their organizing plans and action steps.

- **Issue Training and Technical Assistance**

  Training and technical assistance often overlap. For this report, training includes the creation and delivery of a curriculum to a group. Technical assistance is the creation and delivery of hands-on help to an individual or a group based on specific identified needs.

  Issue Training

  Some training focused on developing content knowledge related to an issue.

  Consumer Voices for Coverage and **Health Care for All**, a Massachusetts-based coalition of stakeholders in health, trained members of a health coalition in coverage options available through the Affordable Care Act, for example. **Dignity in Schools**, a national member-led coalition, provided training to local and central school district staff, youth, and parents in the provisions of the Every Student Succeeds Act.

  Developing an advocacy training curriculum and strategy were explicit goals of the **Advocacy Academy** created by Tandeka, LLC. Staff and consultants designed and delivered "deliberate, methodical trainings that span several days," according to Tandeka, and they created a manual and guidelines to equip participants to train others.

  Technical Assistance

  The ReGenerations project at the **Funders' Collaborative on Youth Organizing** used RWJF funds to pay for Fellows based at youth organizing agencies across the country. Fellows developed individual plans and received monthly coaching and other forms of technical assistance during their two-year fellowship.

  New Routes to Community Health provided technical assistance to local partnerships of immigrant groups and local media in eight cities. The goal was to use storytelling and media to address health concerns of immigrants and refugees, letting the immigrants speak for themselves. Technical assistance included meetings, site visits, conference calls, and cross-site ventures.

Coalition-Building and Partnership Development

For purposes of this report, a coalition is an entity with a legal structure, staff, etc. A partnership may be a more or less structured relationship among people or organizations working toward a common goal, although partner relationships might also involve shared or pass-through funding or memoranda of understanding.

- **Support for Coalitions**

  Dignity in Schools (DSC) is housed at the **National Economic & Social Rights Initiative (NESRI)**. Grants from RWJF enhanced the capacity of Dignity in Schools to work with coalitions across the country on a range of school discipline initiatives, including implementing the Model Code and Moratorium.

  "We have found that DSC's member-driven coalition infrastructure and our unifying framework around a human rights vision for dignity in schools has been successful…"— report from NESRI.

  Health Care For All used RWJF funds to add safety net insurance providers, representatives from groups of people with disabilities, and community-based organizations to its coalition. In 2015, the coalition developed a new coalition advocating for improved food, housing and health care to support a Culture of Health for children in Massachusetts.

- **Promoting New Partnerships among Grantees**

  With the grants comprising the **Childhood Obesity Food Marketing Initiative**, "RWJF arranged a marriage among four organizations to counter corporate marketing targeted to low-income and minority youth," said Victoria K. Brown, MPA, RWJF senior program officer.

- **Partnerships Involving RWJF**

  RWJF itself has established partnerships with key organizations such as the **American Heart Association**, on behalf of Voices for Healthy Kids. It has also joined funder collaboratives including the **Communities for Just Schools Fund**, the **Convergence Partnership**, and the **Funders' Collaborative on Youth Organizing**.

  In addition to participating in funder partnerships, RWJF has reached out to create programmatic partnerships with key civil rights organizations such as the **NAACP** and **UnidosUS**. These partnerships not only add to the pool of resources available to address important issues; they also add depth and breadth to the capacity of each partner.

  "I think…about frames in which they [NAACP] do their work. It is so really rooted deeply in civic engagement and the principles of democracy. And us, as probably public health-leaning…how do we think about that translation piece."—Maisha E. Simmons

Convening

Many projects brought participants together as part of the work. These meetings were universally popular with attendees.

CCHE's annual meetings were conducted in both English and Spanish, with simultaneous translation. Accommodations were made for people with child care responsibilities.

The **Funders' Collaborative on Youth Organizing** sponsored two national meetings of its ReGenerations sites. One staff member and two youth leaders from each of the 12 sites attended.

The first of RWJF's two grants to **ioby** supported a meeting of 99 grantmakers and 45 ioby neighborhood leaders. Through this meeting, ioby staff learned how to plan for a national convening, and it established new partnerships with three funders.

RWJF funded four meetings convened specifically to ascertain community organizing priorities in different regions of the country: one each in the East, Midwest, South, and West. These meetings were independent of any project.

Evaluation

Several projects featured in-house surveys to gauge progress and effectiveness. Five featured evaluations conducted by outside organizations.

- **Communities Creating Healthy Environments** (evaluated by Loyola Marymount University) used community-based participatory research to assess site needs and expertise, track project activities, and train site staff to collect data and apply interim findings to their practice.

- **Communities for Just Schools Fund** (evaluated by Attendance Matters/Jane Sandius) assessed the project's impact on grantee organizations, the field of constituent-led organizing, the use of punitive discipline and positive alternatives, and student success.

- **Consumer Voices for Coverage** (evaluated by Mathematica) examined the structures of the networks and whether their capacity increased during the program. A second evaluation focused on activities and outcomes reported by 18 grantees.

- **ReGenerations**/Funders' Collaborative on Youth Organizing (evaluated by Imoyase Community Support Services of Los Angeles) collected data on site characteristics, political education efforts, leadership development, and outreach and recruitment strategies.

- **Tobacco Policy Change** (evaluated by Research Foundation of the City University of New York) used quantitative and qualitative approaches to document progress among individual sites and to assess the national program as a grantmaking strategy.

Projects of Potential Interest

Three projects reviewed appeared to be fairly remote from the front lines of community organizing, although they might provide useful insights to the field.

In 2009, RWJF funded the Pew Charitable Trust to guide a five-year **Health Impact Project** aimed at promoting the wider use of Health Impact Assessments (HIAs).[1] The project provided funding for local and state demonstration projects and for convening stakeholders, but public health

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[1] The National Research Council defines health impact assessments as "a systematic process that uses an array of data sources and analytic methods and considers input from stakeholders to determine the potential effects of a proposed policy, plan, program, or project on the health of a population and the distribution of those effects within the population."

departments or university-based research centers—not community organizations—often developed the assessments.

Evaluation findings of the project, gathered from an in-depth study of 23 HIAs and a national web survey concluded that "HIAs shape the process and results of decisions—not only for the specific policy and planning targets of these HIAs, but often for broader issues as well." Community organizers might be encouraged to participate in the development of HIAs.

Two other RWJF initiatives, not included in the scope of this review, might yield additional insights. RWJF's **County Health Rankings & Roadmaps** uses more than 30 measures to indicate the health of a community. By ranking the health of almost every county in the nation, the rankings help communities understand factors that influence the health of their residents. They are also used to drive conversations and action.

The RWJF **Culture of Health Prize** honors and elevates communities that have come together around a commitment to health, opportunity, and equity through collaboration and inclusion, especially with historically marginalized populations and those facing the greatest barriers to good health.

PART III

RECURRING THEMES

This section notes themes explicitly or implicitly expressed in grantee and RWJF documents, and in the interviews.

One theme is the use of different and sometimes broad terms to characterize the work. Another is RWJF's involvement with new organizations, particularly youth and digital or social media groups as it has added a community focus to complement its policy efforts. A final theme is the relatively scant attention to evaluation of community organizing investments.

Language and Key Terms Utilized

The wide array of terms used in RWJF and grantee documents makes it challenging to define or even describe community organizing. The reviewed documents did not include definitions. This ambiguity is understandable given RWJFs historical focus on policy change over community organizing, and the independence of the teams in designing projects.

There may also be a concern that terms like "organizing" and "power-building" suggest lobbying as a tactic. Many of the project précis noted that one risk of the grant was the possibility that grantees would engage in lobbying. The documents did indicate, however, that grantees understand the difference between educating and lobbying, and none used RWJF funds for lobbying activities.

More precise use of language related to distinctions between "organizing" and "power-building" will add clarity to Foundation staff and grantee thinking about these activities. These terms appeared to be used interchangeably in some cases.

The word "advocacy" in particular often seemed to be a generic stand-in for organizing and power-building. At times "advocacy" also implied a wider range of activities, such as producing written material or meeting with policymakers.

The context in which terms appeared, however, makes it possible to draw inferences to distinguish them. A 2013 proposal from the Funders' Collaborative on Youth Organizing on behalf of **ReGenerations**, for example, illustrates how the organization views "building power," a key project activity. That proposal describes the grant objective as "to more deeply leverage the power of local youth organizing…" and a 2017 proposal notes the importance of organizing as a "strategy to empower young men of color and their communities…"

A proposal for a 2017 grant to the **Communities for Just Schools Fund** speaks of "power dynamics that keep young people and their families from participating in decision-making about their schools…," noting that the work of the project "changed the rules of the game, the system of education for young people, and the power dynamics…"

"Capacity" appears often as well, usually referring to strong organizations with robust infrastructures and effective leaders. While this is not incorrect, "capacity" can also have a broader meaning. An organization with a credible and effective reputation in a small community may have capacity that a larger institution lacks.

RWJF's **Consumer Voices for Coverage** program characterized its work as "giving voice" to consumers in designing health care coverage options. A 2014 program précis lists one program activity as "supporting consumer engagement…".

A 2011 grant to the **Greater Boston Interfaith Organization (GBIO**)— "Harnessing the Power of Consumers: Engaging Massachusetts Consumers in Containing Health Care Costs"— features the word "power" in its title. The project, one of seven funded under RWJF's Targeted Solicitation on Quality Improvement and Performance Measurement program, focused on leveraging the power of educated consumers to impact the quality and cost of their own healthcare and healthcare in their communities. Consumers educated through the project developed questions to guide the development of principles for a statewide cost-review process.

The Foundation's shift in 2014 to promoting a Culture of Health accelerated and deepened the use of community organizing terms and principles. A 2017 proposal from the National Economic & Social Rights Initiative on behalf of **Dignity in Schools**, for example, notes the advancement of a "justice reinvestment framework" on behalf of the National Youth Alliance on Boys and Men of Color.

The opening of a 2016 report from The Praxis Project on behalf of **CCHE** notes discriminatory policies that created "food apartheid" in communities of color and states, "the primary inequities we needed to address were rooted in the enduring, racialized power dynamics in public policy."

Explicit language holding that equity is a driving force underlying RWJF's grantmaking decisions appears as staff began to dig deeper into what a Culture of Health means to the Foundation and to communities.

"With a Culture of Health, "I think we are starting to get much more comfortable about recognizing a notion of power, and I attribute that to the frame of health equity."—Maisha E. Simmons.

According to one of the technical assistance consultants to CCHE:

"It's a lot more comfortable and easier to have a conversation about exercise or having a nice park, but that doesn't get to the conversation about why there are seven times more parks in neighborhoods without people of color."—CCHE/The Praxis Project

A perspective from Jennifer M. Ng'andu suggests the kinds of conversations about language that staff at RWJF or other foundations might have:

"I think 'voice' can be challenging and we should use that with caution. Community organizing may be about elevating voice, but it is not about providing a voice to the voiceless. I struggle with 'empowerment' because it is about the idea of giving power to another party, and you can't do that. We can wake up power and help people step into power."—Jennifer M. Ng'andu

Entry of Different Organizations into RWJF's Family of Grantees

Newer grantees focused on issues such as preventing bullying in schools and promoting understanding of the influence of technology, especially technology and social media focused on low-income youth and youth of color.

CCHE, which started in 2007, actively recruited organizations outside the health community. To broaden its applicant pool, for example, CCHE staff held community meetings, including meetings conducted in both English and Spanish, and conducted extensive outreach to social justice organizations and to organizations located in Southern and rural areas. Participating sites included agencies focused on criminal justice reform, immigration and education services, youth-led organizations, substance abuse and violence prevention agencies, and a tribe.

Youth Organizing Agencies

The Foundation has long supported activities to provide better opportunities and outcomes for youth but with a 2011 grant to the **Funders' Collaborative on Youth Organizing,** RWJF began to engage more directly in initiatives to build youth organizers and youth leaders, especially in the area of school discipline. Grants to **Dignity in Schools** are motivated in part by an interest in better understanding issues of concern to youth of color. Two-thirds of organizations participating in the campaign are led by students and parents from low-income communities of color.

RWJF's participation in the **Communities for Just Schools Fund**, which promotes effective implementation of the Every Student Succeeds Act, gives the Foundation a voice in promoting better school environments and elevates the role of youth as leaders.

RWJF's entry into supporting healthier school environments seems especially vibrant and productive. Schools are deeply embedded in communities, and organizing work centered on schools builds leadership among young people as it also facilitates the development of stronger communities. The three youth-organizing grantees mentioned above have mobilized young people to become leaders in forcing schools to reduce bullying and to shift from punitive to restorative discipline practices. They have also offered teachers and principals alternative ways to ensure that schools are safe places for students to learn.

Through its involvement with these youth-serving agencies, RWJF is also supporting the development of our country's next generation of leaders, instilling in them principles of fairness, democracy, and inclusion.

"Democracy tends to be a fundamental value...and, for instance, Dignity in Schools is one of the most democratic organizations that I have ever seen...They are not even looking for majority rule, at least not in the same way. It is inclusion taken to its most important level."—Jennifer M. Ng'andu

Civic Digital and Mobile Technology Organizations

A 2016 grant to Civic Hall for the development of the **RWJF Culture of Health Lab** focused on promoting the intersection of civic innovators with health (described by Civic Hall as the "civic determinants of health") using technology as a key tool. RWJF has also funded the **Center for Digital Democracy** (as part of the Childhood Obesity Food Marketing Initiative), **DoSomething.org**, and **Enactus** to apply technology for social good.

RWJF's investments in digital and mobile organizations reflect a recognition that technology continues to be a growing influence and holds potential to contribute to well-being and civic life. Yet, technology does not replace hands-on organizing, and signing online petitions does not constitute fulfilling one's civic duty. Technology and social media can get the word out, but they are not necessarily going to help build a base for sustained action. Grants to digital organizations, therefore, focus on educating consumers about inappropriate social media tactics and on helping them use technology as a tool to achieve positive change.

The **Childhood Obesity Food Marketing Initiative** is one such example. Black and Latino youth are targets for predatory marketing through social media. The initiative is dedicated to helping these young people understand that they are being targeted and to help them become savvy users of the technology.

The initiative has forged a new relationship among four important players in marketing, especially online marketing, to low-income youth and people of color. The **Center for Digital Democracy** and the **Berkeley Media Studies Group** have complementary expertise in digital media marketing. **Color Of Change** brings expertise in culturally competent messaging aimed at black Americans,

especially online messaging, as well as significant capacity in online organizing. **UnidosUS** brings extensive knowledge of grassroots organizing.

Working together within the Childhood Obesity Food Marketing Initiative, **Color Of Change** and the **Center for Digital Democracy** participated in a coalition that was instrumental in prompting needed changes in the Federal Communication Commission's (FCC) rule-making on privacy and net neutrality. The FCC reversed the rule under the new administration, but the collaborative work prompted by this project has mobilized the public interest community to promote responsible digital policies.

Limited Attention to Evaluations of Community Organizing Projects

As noted in Part II, only five projects, three of which are large national programs, appeared to contract with outside evaluators. Several other projects featured surveys or otherwise solicited feedback from program participants. Thoughtful and timely evaluations provide helpful guidance both to people engaged in community organizing and to the larger organizations in which they work. They also provide RWJF with useful information to inform its grantmaking and priorities.

PART IV

LESSONS

The document review and interviews point to some lessons for RWJF to consider, and some of these might have relevance for other funders and community organizations as well. Seven strategic and seven nuts-and-bolts lessons are offered.

Lessons for Strategy

Lessons for strategy address the use of guiding principles, working with non-health organizations, investing in an organization's internal operating systems, ceding some authority, balancing inside-outside and carrot-stick approaches, bringing people together, and participating in funder collaboratives.

- **A clear, concise expression of principles or vision helps grantees move toward bolder outcomes while remaining grounded in meeting short term objectives.**

  Some organizations expressed an explicit vision for their project, going beyond statements of tangible goals and objectives. Those that kept the vision front and center seemed especially capable of ramping up to broader levels of influence.

  In articulating the work of **CCHE**, for example, The Praxis Project posits that problems like childhood obesity and poor health are structural, and that "a structural problem needs a structural solution." The program, then, "chose to support community organizing because organizing advances structural solutions for long-term policy and community change."

  All CCHE activities, which spanned the work of 22 funded sites, 12 technical assistance consultants, and an external evaluation, flowed from this vision.

  PolicyLink presented the vision for the **Convergence Partnership** as "healthy people living in healthy places." In multiple documents issued through the life of the project, PolicyLink staff consistently expressed how that vision would be realized and the role of the national and regional partnerships in achieving it.

  As **Faith in Action'**s relationship with RWJF evolved from a focus on increasing coverage to an emphasis on more directly contributing to a Culture of Health, the organization sharpened the emphasis of the work it proposed to undertake with RWJF funds:

  "To build public will for policies that can improve health outcomes for children and families and strengthen the capacity of clergy to advance local actions."—Faith in Action

  In Our Backyards operates under a principle of "Learn, Experiment, Share: Successful and lasting change comes when we embrace struggle and uncertainty as opportunities for creative experimentation and trust its potential for transformational impact."

- **Engaging grantees that have organizing expertise and community credibility, even if they do not have expertise in a particular substantive topic, yields benefits to grantees and funders.**

  Many programs and projects worked from the assumption that it would be easier to teach community-based organizations about tobacco, health coverage, or obesity than it would be to teach health organizations about community organizing.

  Community organizing rests on the strengths and characteristics of community values, residents, and organizations. These core strengths and characteristics need not be limited to one or even a few specific issues; rather, they develop in a variety of ways across and within diverse economic, ethnic, and political environments.

  It is more respectful of community priorities, and more effective in achieving shared goals, to help community-based organizations incorporate health into their work than it is to expect a health-focused agency to take on an organizing agenda.

  Examples of RWJF-funded projects that followed this principle include:
  - Tobacco Policy Change
  - Communities Creating Healthy Environments
  - Funders' Collaborative on Youth Organizing

- **Improvements in core organizational infrastructure and operating systems can create lasting benefits.**

  "The Foundation's support of ioby has been nothing short of transformational."—In Our Backyards

  The grants to **In Our Backyards** allowed it to hire a business consulting firm and a website development firm. With guidance from these experts, staff at ioby revised the organization's economic model, created a five-year plan for growth, and changed technology and other systems to make it easier for community residents to propose projects for crowdfunding and for donors to invest in projects.

  With a more robust infrastructure in place, **ioby** staff created a peer-to-peer learning model. It also developed resources such as in-person gatherings, a webinar series, and online guides called "The Recipes for Change" and "Learn from a Leader" to help residents market their project ideas.

  The multi-year commitments to the **NAACP** and **UnidosUS** are helping those organizations incorporate a Culture of Health vision into their civic democracy, justice, and engagement missions. With strong management, technology, and communications capacity, these large organizations can mobilize and support thousands of local affiliates and volunteers who know and are trusted by residents.

  The local affiliates of these agencies, in turn, benefit from the comprehensive reach and resources of their national organizations.

  Core investments also provide funders with boots on the ground and vibrant partnerships with community groups whose constituents might otherwise not consider the funder to be interested in their specific projects and programs.

The decision to invest in leadership development, information technology, finance, and other components that build infrastructure, while bold, likely engages funders with organizations in different ways and offers its own challenges. Attention should be paid to establishing priorities for sequencing the structural changes to ensure they do not overwhelm organizations.

Faced with the press of immediate needs of constituents, it is easy for community organization staff to set aside administrative and management upgrades, even when they know the organization will benefit. Infrastructure changes may fundamentally alter the way the organization does business, so staff needs to "own" the changes in order to ensure their successful adoption. Changing information technology, finance, and management reporting systems usually does not proceed smoothly. Patience and understanding will be required when unforeseen problems arise.

Funders can facilitate successful transitions by setting measurable benchmarks for organizations to strive for through the transition period and by asking for progress reports along the benchmarks and for early notice of problems and challenges. By participating in the development of corrective action plans where needed, funders can better pinpoint the most difficult areas to address and can use that information in establishing other infrastructure grants. Outside expert consultants might be needed to guide the funder and the grantee organization in developing and monitoring appropriate benchmarks.

- **Supporting communities to organize and succeed involves exercising flexibility in grantmaking and ceding some authority in decision-making.**

  "Can we give funds for you to be who you are and what you do?"—Maisha E. Simmons

  RWJF grants have at times been somewhat directive and tilted toward meeting the goals of the staff team. This approach can force grantees into making too many decisions about projects and expected outcomes before the work begins. "We were somewhat limited because we were very strategic about funding things that were in the somewhat narrow goals that we had," recalled Lori K. Grubstein.

  "I would use the Funders' Collaborative on Youth Organizing as a group that we've shoehorned because they felt like for a while all they could do was childhood obesity..."—Jennifer M. Ng'andu

  One grantee described how flexibility by RWJF paid off:

  The **National Domestic Workers Alliance** received funds under the Foundation's Pioneer Portfolio to better understand the need for improvement in working conditions of domestic workers and the quality of home care they provided.

  "This grant gave us the space to experiment with valuable ideas in important venues; identify and assess what we were learning; understand what would and would not work, and why; and pivot our focus on resources on the next points in the learning curve."—National Domestic Workers Alliance

  Former senior program officer John Govea notes a legitimate balance that RWJF has to strike in sustaining its reputation for being a trusted source of information for policy while also trying to support community agencies in taking a leadership role. "I accepted that RWJF sits in a special place, trying to be the voice that everyone will listen to...That puts a lot of responsibility on the Foundation." Many other foundations likely share this challenge.

- **Effective community organizing involves balancing inside-outside and carrot-stick approaches.**

  Inside strategies of organizing include getting community residents elected to local office or appointed to boards or educating policymakers to make better decisions. Outside strategies might include rallies or events that shine a spotlight on inequities.

  Dignity in Schools mobilizes grassroots member organizations to press local and district education officials to promote positive disciplinary practices allowed through the Every Student Succeeds Act.

  Staff at the campaign concluded that it is important for youth and parents, those most affected, to take the lead, but it is also essential to involve education officials, even though they are the targets of the organizing work. Staff noted, however, that working with a sympathetic and collaborative administration sometimes makes it harder for advocacy groups to keep the pressure on when that is necessary.

  In considering the diverse organizations participating as equal members in the **Childhood Obesity Food Marketing Initiative**, Victoria K. Brown notes:

  "You need the carrot and the stick, and they have to be working together, and often they work against each other. The stick is annoyed that the carrot is talking with the enemy. Embrace the tactics that each organization can bring to the table, and then be savvy about using them."— Victoria K. Brown

- **The unique capacity of funders to bring people together is a major contribution to the field of community organizing and should not be underestimated.**

  "The ability to engage and learn with peers from across the country was transformational for many of the youth and was universally noted as one of the most important outcomes."— Funders' Collaborative on Youth Organizing

  While staff in academia and policy institutions often participate in conferences and workshops where they engage with peers from across the country, many people working in community organizing have limited resources to do that. They often have few opportunities to travel to other areas, meet other people engaging in similar work, or hear about emerging research and knowledge.

  Many foundations enjoy reputations as convenors of people with different perspectives. Special attention might be given to funding opportunities for staff and constituents of community organizations to meet away from their home base. Bringing youth together is especially important, as experiences in learning from people from different backgrounds and regions can help young people think differently about their career trajectories.

- **Participating in funder collaboratives has been enlightening for RWJF.**

  "I actually see almost all pros to the work that we have done with collectively with funders. Part of that is that the work was established around shared values...rather than 'We want to work on this particular initiative'...I think we are really just discovering the strength of having this work done in networks at a donors table."—Jennifer M. Ng'andu

RWJF's work with the **Communities for Just Schools Fund**, for example, has helped bring RWJF into the arena of topics such as reducing punitive discipline practices, promoting positive discipline practices, and disrupting the school-to-prison pipeline. Joining donor collaboratives opens new topics to funders, where they can engage without taking the lead.

Through its involvement in the **Funders' Collaborative on Youth Organizing**, RWJF has been able to participate in activities to build leadership in community organizing.

Nuts and Bolts Lessons

Nuts-and-bolts lessons include the use of power mapping tools, the promotion of collaboratives among grantee agencies, engaging with non-health organizations, involvement of funder staff in projects, and the use of intermediaries to provide guidance to community agencies.

Other practical lessons—allowing time for planning, involving evaluators, engaging with and valuing community residents, and appreciating the impact of economic downturns and funding cutbacks on direct service providers—are familiar to most funders but are mentioned here as well.

- **Power mapping is a valuable tool for understanding and negotiating power relationships.**

  Power mapping—a visual tool and process by which community members map relationships among actors in a geographic location in order to build alliances and identify people most likely to promote social change—provided a new, popular, and easy-to-use framework within which community members analyzed power structures in their communities. The tool also helped them understand power dynamics and power relationships more broadly. Community residents and grantee staff reported using power mapping tools to reassess local power structures when elections resulted in changes in elected or appointed officials.

  Participants in Tandeka, LLC.'s **Advocacy Academy**, including staff from the local YMCA, the Mississippi Center for Justice, county health departments, and others, rated the training they received in power mapping as especially valuable, crediting its use with overturning the roster of public officials in one community.

  "By getting a fine-grain power analysis, we were really a lot more effective. Our issues didn't get lost in the process, we moved forward unlike a lot of other folks. So, we were really happy."—Executive Director of the Public Policy Center of Mississippi

  A technical assistance provider to **CCHE** provided introductory and more advanced power analysis trainings to sites that requested it. The Praxis Project's final report to RWJF indicates "The power analysis had an impact on the way the grantees analyzed the landscape. The process helped groups ground their policy work in grassroots community organizing for long-term solutions and increased their ability to impact change."

- **Projects that require grantee agencies to collaborate with one another promote broader learning about multiple dimensions of health and well-being.**

  The **Childhood Obesity Food Marketing Initiative** provides equal grants to four organizations, one each in technology research, grassroots organizing, food and beverage issues, and outreach to communities of color. The initiative blends research, youth empowerment, public health, media, and other disciplines to effectively counter the

aggressive and targeted marketing of unhealthy food to low-income children and children of color.

Other projects connected civic technology companies with community groups. One established the RWJF Culture of Health Lab at Civic Hall. As a result, two community organizations became partners with Civic Hall in spearheading a housing data consortium with the goal of amassing housing data for use by lawyers, organizers, and others. Another improved a mobile app used by community residents, often youth, to better gather information to corroborate police misconduct.

Projects involving mobile technology might be particularly attractive to young people.

*"**DoSomething.org's** model…hinges on using engaging, low-barrier actions as an entryway to civic engagement and social impact—what we call 'the vitamin in the Twinkie.'"— DoSomething.org.*

- **Regular interaction between grantee staff and program officers is highly valued and appreciated by project staff.**

    Many grantee reports noted the value, reassurance, and motivation provided by regular (bi-weekly or monthly) telephone check-ins with their RWJF program officer. Mentioned explicitly by Civic Hall and **Tandeka, LLC.**, these check-ins might be especially important to grantees that are not large policy houses or that have not had prior involvement with the funder.

- **Intermediary organizations provide essential and invaluable coherence to complicated projects, although these organizations tend to be clustered in large coastal cities and are underrepresented in other areas of the country.**

    Community Catalyst, Faith in Action, and **The Praxis Project** are examples of intermediaries. Two served as national program offices, and one, Faith in Action, worked through its network of faith organizations across the country. Intermediaries can serve as sounding boards for community agencies as they implement new strategies, organize or deliver training and technical assistance, and convene participants from multiple sites. They also often function as liaisons between foundations and community groups.

- **Providing funds and time to allow community groups to plan is likely to enhance project progress and develop planning and other skills in staff.**

    Community organizations are not necessarily accustomed to receiving support for planning activities. Providing funds for upfront planning demonstrates respect for people's time and ideas, and it facilitates the development of trusting relationships essential to project successes.

    "If we had even two months of planning, to recognize we are going to honor and pay people… before they have to implement, I think we would see a world of results. If we were able to collect those results over time, then we would begin to see the value of more democratic processes. We have to call the question that it is not OK to move too soon."—Jennifer M. Ng'andu

The **Communities for Just Schools Fund** noted that RWJF's strategic realignment white paper and retreat process, originally suggested by senior program officer Maisha E. Simmons, "provided a critical moment for reflection for the Fund and its work."

- **Involving community members in all aspects of a project is essential to success and to developing capacity among residents and staff.**

  Local organizations that receive outside funding are often required to meet benchmarks and standards. They are also often required to cooperate with evaluators, technical assistance providers, and others.

  These types of involvement are essential to success and growth, and they should be encouraged. Yet, community residents and staff have their own areas of expertise, knowledge, and standards, and those should be equally respected, encouraged, and rewarded.

- **Increased attention to evaluating community organizing initiatives has the potential to enhance understanding of the initiatives and to advance the organizing field.**

  As noted in Part II, only five of the featured projects included external evaluations. While many projects solicited feedback from participants through informal surveys, they and the community organizing field as a whole, missed opportunities to systematically learn from their work.

  It is not readily apparent why relatively little attention was devoted to evaluating initiatives. The initiatives that did feature evaluations tended to be directed by large, robust organizations, which most likely had enough in-house capacity to contract with and oversee evaluators.

  It is possible that newer, smaller organizations need more time and technical assistance to develop staff and systems before they can be fairly asked to engage with evaluations. In these cases, starting with qualitative evaluations that analyze how organization staff and community members design, implement, and adapt interventions might be useful.

PART V

SUGGESTIONS AND RECOMMENDATIONS

This section offers suggestions that come from the review of RWJF documents, though they do not necessarily come from any particular document. While the recommendations are targeted to RWJF, they might be relevant to others as well.

- **Develop shared understanding about key terms and when to use them.**

  As noted, RWJF staff and grantees use a wide range of terms, often without explanation, to describe this work. Shared understanding need not involve reaching consensus on a particular definition, but it should be explicit enough to help staff view their organization's work in this area more holistically, and to clarify expectations with grantees.

  Terms that warrant attention include:
  - Intentional use of "advocacy," when that is the aim, and "organizing" when that is the aim. It appears that "advocacy" and "organizing" are used interchangeably, especially by grantees.

  - Consensus on or at least understanding of the concept of "community power" and "power-building." Common understanding of these terms is likely to clarify the ways in which they overlap with or differ from concepts and strategies of community organizing, the term most often used in the reviewed documents.

  - When to feature bold and direct language: justice, action, power, human rights.

  - The nuances of organizational "capacity." It is easy to conclude that large organizations have capacity, and small ones lack it. Yet, small, local organizations may have greater capacity to build and sustain community power.

- **Develop a theory of change for ways community organizing and community power-building can support funder priorities.**

  RWJF has issued papers on health equity and an Action Framework for a Culture of Health that offer structures within which to consider a theory of change. Multiple models exist in the literature, and those can be explored as well.

- **Examine ways that fellowship or leadership development programs can contribute to an organizing and power-building agenda.**

  Some foundations sponsor fellowships or other leadership development programs. Priority could be given to recruiting diverse researchers and practitioners interested in community organizing into these programs. Fellows could participate in program evaluations, provide technical assistance, enrich their professional experiences, and grow the community organizing field.

  Funders might encourage grantees to support their employees in applying for and participating in fellowship or leadership development programs.

- **Fund research about on-the-ground activism, including qualitative studies of the processes by which power is created within a community, and quantitative studies of the outcomes.**

  Funders that support research studies could give greater weight to studies that address the complexities inherent in evaluating community organizing and power-building programs and solicit proposals from researchers experienced in this area.

- **Increase attention to evaluations of work in this field.**

  Changes of the kind covered in this report can take decades or generations. Nonetheless, there are indicators of progress that can and should be measured. There is a cadre of well-established evaluators who have been studying power-building for many years, and those could be engaged in evaluating future projects.

- **Be sensitive to and in concert with grantee organizations that may be reeling from enormous policy, political, and economic challenges.**

  Some of the projects reviewed took place during the 2008 economic downturn, which necessitated abrupt changes in course as community organizations were besieged with sudden increases in demand for core services. The increased demand, of course, coincided with decreases in income as revenue from taxes and philanthropy dropped.

  Some of the projects reviewed for this study have been especially affected by recent changes in federal policy.

  Challenges noted by grantees include:

  - In its study of the effect of preemption on community activism, grantee **Grassroots Change** concluded:

    "Preemption is designed to be a complete threat to the foundation of a Culture of Health. It strips people of their power to impact destiny and leads to a sense of helplessness and hopelessness that suppresses civic engagement."—Grassroots Change

  - **Color Of Change**'s initial progress with the FCC in promoting broadband privacy was impeded when the new administration rolled back earlier changes, prompting Color Of Change staff to divert resources to minimizing the effects of the rollback.

  - **UnidosUS** reported that "A key factor that has significantly impacted the initial phase of the work has been the outcome of the 2016 election…This has resulted in NCLR [National Council of La Raza, former name of UnidosUS] redirecting its efforts and organizational capacity…".

- **Aggressively explore opportunities to fund organizations across all areas of the country.**

  With 29 of 39 grantees based in large cities on the East and West coasts, a quick look at the roster of grantees makes RWJF grantmaking appear skewed to those areas. Many of these grantees passed funds to project sites across the country, but the controlling organizations were not located in rural, Midwestern, or Southern communities. Explore organizations based in those areas for consideration as recipients of large grants.

"To get statewide policy change, get a good cross-section of participants—don't concentrate in the capital or state center." Tandeka, LLC., final narrative report for the Advocacy Academy

CONCLUSION

RWJF and many other funders have rich histories of supporting initiatives in communities. These ventures set the stage for future efforts to promote community organizing to help communities in areas such as reframing school discipline, protecting worker rights, reducing obesity, shaping appropriate use of social media, and other issues of importance to building a Culture of Health.

APPENDICES

APPENDIX 1: GRANTEES

American Heart Association, Dallas, Texas
To build healthier lives, free of cardiovascular disease. A national education policy, research and advocacy organization with 22.5 million volunteers and supporters and 156 local offices.

Voices for Healthy Kids

American University, Washington, D.C.
An undergraduate and graduate university with eight schools and more than 160 programs awarding bachelor's, master's, and doctoral degrees.

Investigating Local Interventions That Help Low- and Moderate-Income People Remain in Gentrifying Communities
National Leadership Development Program, Interdisciplinary Research Leader (ID 74388)

Assisi House, Inc., Baton Rouge, La.
A nonprofit organization committed to meeting the needs of those at risk for homelessness.

Studying How Housing Affordability and Conditions and Neighborhood Characteristics Affect the Health of Residents
National Leadership Development Program, Interdisciplinary Research Leader (ID 74381)

Campaign for Tobacco-Free Kids, Washington, D.C.
An advocacy organization working to reduce tobacco use and its consequences, promoting the adoption of proven solutions that are most effective at reducing tobacco use.

Working with Community Organizations to Reduce Tobacco Use in Communities and States with High Smoking Rates (74202)

Center for Digital Democracy, Washington, D.C.
A research, education, and advocacy organization to protect consumers in the digital age.

Childhood Obesity Food Marketing Initiative (ID 73468)

The Center for Popular Democracy, Brooklyn, N.Y. and Washington, D.C.
A nonprofit organization that builds the power of communities to ensure the country embodies our vision of an inclusive, equitable society.

Convening Community Organizers from the East to Identify Partners' Priority Campaigns that Impact Health and to Inform Health-Equity Advocacy (ID 74193)

Center for Community Change, Washington, D.C.
A training, advocacy, and coalition-building organization to build the power of low-income people, especially low-income people of color, to change their communities and public policies.

Convening Community Organizers from the Midwest to Identify Partners' Priority Campaigns that Impact Health and to Inform Health-Equity Advocacy (ID 74197)

Central Indiana Community Foundation, Indianapolis, Ind.
A public charity awarding grants to nonprofit agencies, helps donors practice effective giving, and provides leadership to make Central Indiana a better, more beautiful, more equitable community.

MCON 2017 Sponsorship (ID 74522)

ChangeX, Minneapolis, Minn. and Dublin, Ireland
A platform of proven ideas for people who want to strengthen their community, providing information and support to help participants get those ideas up and running in their communities.

Empowering U.S. Communities to Build a Culture of Health (ID 73539)

Civic Hall, New York, N.Y.
Civic Hall Labs, the research and development arm of Civic Hall, collaboratively designs and develops technology pilot projects that have measurable impact and the potential to scale.

Creating the Culture of Health Lab to Foster Cross-Sector, Cross-Community collaboration to Advance Health Equity (ID 73274)

Color of Change, Oakland, Calif.
An online force of more than one million members that designs campaigns to end practices that unfairly hold Black people back and champions solutions that move us all forward.

Childhood Obesity Food Marketing Initiative (ID 73476)

Community Catalyst, Boston, Mass.
With offices in five cities and working in five states, organizes consumer voices to ensure that all people have an organized voice and a seat at the table where health decisions are made.

Consumer Voices for Coverage/Strengthening State Advocacy Networks (SSCA)

Communities for Just Schools Fund, Washington, D.C. (New Venture Fund, fiscal agent)
A national donor collaborative that supports constituency-led organizing efforts to create positive and supportive school climates that affirm and foster the success of all students.

Supporting the Just and Fair Schools Fund in Working to End Harsh Discipline Policies and Practices in Schools (ID 70207)

Supporting the Communities for Just Schools Fund in Ending Harsh Disciplinary Practices and Advancing Supportive Educational Environments (ID 74188)

DoSomething.org, New York, N.Y.
A digital platform powering offline action by mobilizing young people in every U.S. area code and 131 countries to sign up for a social change or civic action campaign on something they care about.

Proving the Impact of the SoSomething.org Social Movement Model in Creating Civically Engaged Youths in Building Healthy Communities (ID 73807)

Enactus, **Springfield, Mo.**
A nonprofit organization that engages the next generation of entrepreneurial leaders to use innovation and business principles to improve the world.

Empowering Millennial to Engage Small Businesses to Build a Culture of Health (73638)

Faith in Action (formerly PICO National Network)**, Oakland, Calif.**
A national network of more than 1,000 faith-based community organizations in 150 cities and 17 states that works to implement a vision that unites people across region, race, class, and religion.

Advancing the Interests of Low and Moderate-Income Families in the National Health Reform Debate by Strengthening the Faith Voice (ID 66030)

Engaging Urban Residents in Improving Their Care Through a Community-Led Accountable Care Organization Model (Grant under Targeted Solicitation on Quality Improvement and Performance Measurement) (ID 69189)

Supporting PICO National Network's Initiative to Prevent Childhood Obesity (ID 70326)

Expanding PICO National Network's Initiative to Prevent Childhood Obesity to Include Broader, Multisector Efforts to Build a Culture of Health (ID 73363)

Convening Community Organizers from the South to Build Community Power for Improving Well-Being and Closing Racial Gaps in Health and Life Expectancy (ID 74190)

Mobilizing Faith-Based Communities in 10 States to Strengthen Family-Friendly Policies and Catalyze Local Action So All Children Can Thrive (ID 74571)

Frontline Solutions International, LLC, **Philadelphia, Pa.**
A consulting firm that serves the philanthropic and nonprofit sectors by helping those on the front lines of change define goals, execute plans, and evaluate impact.

Develop Youth Engagement Strategy and Partner Identification (73130)

Supporting the Enactus-RWJF Partnership in Empowering College and University Students to Engage in Small Businesses to Build a Culture of Health (74171)

Funders' Collaborative on Youth Organizing, New York, N.Y.
A collective of more than 75 social justice funders and youth organizing practitioners dedicated to advancing youth organizing as a strategy for youth development and social change.

Lessons Learned from Mobilizing Youth to Prevent Childhood Obesity (ID 68142)

Empowering Young People from Communities Most Affected to Address Root Causes of Childhood Obesity, Phase 2 (ID 71431) and Phase 3 (73784)

Supporting the 2017 Convening of the National Alliance for Boys and Men of Color (ID 74543) (Under Forward Promise)

Grassroots Change/Prevention Institute (fiscal agent), Oakland, Calif.
Connects advocates with the training and tools to build and sustain grassroots movements: leadership development, resources, up-to-date information, and a grassroots network.

   Supporting and Increasing Visibility, Impact, and Sustainability of Grassroots Change in its Work in grassroots movement-building and pre-emption (IDs 71987, 73772)

Greater Boston Interfaith Organization, Boston, Mass.
As an affiliate of Industrial Areas Foundation, trains and organizes Boston area communities across religious, racial, ethnic, class, and neighborhood lines to organize power to fight for social justice.

   Harnessing the Power of Consumers/Targeted Solicitation on Quality Improvement and Performance Measurement (QIPM) (ID 69187)

Health Care for All, Boston, Mass.
Promotes health justice in Massachusetts by leveraging direct service, policy formation, coalition-building, organizing, education, and outreach to reduce disparities and ensure access for all.

   Multiple grants to ensure and strengthen consumer voices in health reform in Massachusetts and in implementing the Affordable Care Act in the state (IDs 58234, 67314, 69978, 70916)

   One grant to broaden the Healthy Food, Healthy Homes, Healthy Children coalition to support a Culture of Health for Children in Massachusetts (ID 73044)

Health & Medicine Policy Research Groups, Chicago, Ill.
An independent policy center that conducts research, educates, and collaborates with other groups to advocate policies and impact health systems to improve the health status of all people.

   Engaging Communities to Develop Local Legislation that Promotes Healthy Communities (National Leadership Development Program, Culture of Health Leader) (ID 73972)

ioby (In Our Backyards), Brooklyn, N.Y.
In five cities, provides crowdfunding tools to mobilize neighbors who have good ideas to become powerful citizen leaders who plan, fund, and make positive change in their own neighborhoods.

   Supporting ioby's On the Ground Convening to Explore Opportunities for Longer-Term, Larger Investments in Making Communities Healthier (ID 73129)

   Resident-Led Change for Healthy Neighborhoods (ID 73614)

Indianapolis Congregation Action Network, Indianapolis, Ind.
Catalyst for marginalized people and faith communities to act for racial and economic equity in Indiana by developing leadership, amplifying voice, awakening voters, and forming partnerships.

   Assessing the Potential of High-Quality Pre-K to Mitigate Negative Health Impacts of Parental Incarceration (National Leadership Development Program) (ID 74384)

MasComm Associates (Benton Foundation, (fiscal agent), Madison, Wisc.
A project management and consulting firm using media/community collaborations, coalition-building, and problem solving to help people shape issues in ways that prompt changes.

New Routes to Community Health (NRCH)

National Association for the Advancement of Colored People, Baltimore, Md.
A national organization of more than 500,000 members and supporters in 2,200 chapters who advocate and lead grassroots campaigns for civil rights in their communities.

Building a Partnership Between RWJF and the NAACP to Support and Advance a National Culture of Health (ID 73381 and 74488) and Publishing a White Paper to Highlight the Partnership (ID 73537)

National Domestic Workers Alliance, New York, N.Y.
With 60 affiliates in 36 cities and 17 states, offering individual memberships to provide benefits, training, and community, works on behalf of domestic workers, most of whom are women.

Improving the Quality of Home Care Offered Through Online Services and Raising Standards for Their Home Care Workers (ID 73176)

National Economic & Social Rights Initiative, New York, N.Y.
In partnership with communities, works to build a broad movement for economic and social rights by supporting community campaigns, developing leadership pipelines, and shifting public debate.

Three grants to support NESRI's work as the anchor institution for Dignity in Schools:

Replacing Harsh Discipline with Positive Approaches to Improve Education in New York City Schools (Grant under Roadmaps to Health Community Grants) (ID 70532)

Supporting the Dignity in Schools Campaign's Model Code and Its Call for a Moratorium on Out-of-School Suspensions (Grant under Forward Promise) (ID 70955)

Supporting the Dignity in Schools Campaign in Promoting Healthy School Environments Through the Every Student Succeeds Act (ID 75035)

New Prospect Baptist Church, Cincinnati, Ohio
A faith organization sponsoring men's, women's, youth, and relationship ministries in Christian faith, and a range of academic programs for youth and adults.

Investigating Place-Based Assets and Challenges in Early childhood Health in High-Poverty Neighborhoods (National Leadership Development Program, Interdisciplinary Research Leader) (ID 74394)

The Pew Charitable Trusts, Philadelphia, Pa.
A global nonprofit to improve public policy through conducting rigorous analysis, providing useful data to inform the public, and encouraging democratic participation and strong communities.

The Health Impact Project promotes strategies to make health a routine consideration in decisions made in non-health care sectors through community engagement in developing Health Impact Assessments. (Health Impact Assessment/HIA national program)

PolicyLink, Oakland, Calif./Tides Foundation (fiscal agent)
A research and action institute advancing equity by demonstrating how people are creating conditions that benefit everyone, especially those in low-income areas and communities of color.

Convergence Partnership for Healthy Eating and Active Living national program (CPHA)

The Praxis Project, Washington, D.C.
A national intermediary founded on the belief that building local power is critical to making real change, works with national, tribal, regional, state, and local partners to achieve health justice.

Communities Creating Healthy Environments: Improving Access to Healthy Foods and Safe Places to Play in Communities of Color (CCHE) national program (22 site grants and grants to 12 technical assistance providers over two phases)

Evaluation of CCHE: Loyola Marymount University Bellarmine College of Liberal Arts (ID 73286)

Positioning Data for Social Change: A Survey of Grassroots Organizing and Advocacy (ID 74156)

Convening Community Organizers from the West to Design Efforts to Increase Opportunities for Advancing Health for All and Health Justice (ID 74180)

Public Health Institute/Berkeley Media Studies Group, Oakland, Calif.
Works with and trains community groups, journalists, and public health officials to use the power of the media to advance healthy policies and analyzes how media portray health and social issues.

Addressing Digital and Targeted Marketing to Support Equity for Vulnerable Young People and Foster a Culture of Health (Under Childhood Obesity Food Marketing Initiative) (ID 73471)

Restaurant Opportunities Centers United, New York, N.Y.
A national membership organization of more than 25,000 workers that advocates for fair policies, provides training to help workers advance, and partners with responsible restaurant owners.

Health and Safety Education and Services and Advocacy Training for Immigrant Restaurant Workers in New York City (ID 61187)

Creating and Improving Jobs and Access to Affordable Healthy Foods Through Detroit's Community-Driven Food System (Grant under Communities Creating Healthy Environments/ CCHE) (ID 68260)

Recommending Child Care Solutions for Restaurant and Other Service-Sector Workers in Jobs with Nontraditional Hours (Grand under Starting Early: Preventing Obesity Through Healthy and the First Two Years) (ID 74441)

Tandeka, LLC, Dothan, Ala.
A technical assistance and consulting firm specializing in government relations, community relations, policy advocacy, and capacity-building for small to medium-sized organizations.

Developing and Academy to Train Advocates for Policy Change in the Southern United States to Prevent Childhood Obesity (ID 67965)

UnidosUS (formerly National Council of La Raza)**, Washington, D.C.**
A national organization with 300 Affiliates that serves Latinos through research, policy analysis, advocacy, and work on civic engagement, civil rights, education, workforce, health, and housing.

Developing a Platform to Advance Policy Solutions that Address Latino Children's Obesity and Health Disparities (ID 67041)

Improving Access to Affordable Foods and Reducing Exposure to Unhealthy-Food Marketing in the Latino Community to Reduce Childhood Obesity (ID 70138, 72195 and 74208)

Maximizing Coverage for Vulnerable Latinos (ID 71450, 72266, 73144)

Addressing Digital and Targeted Marketing to Support Especially Vulnerable Young People and Foster a Culture of Health – National Council of La Raza (73477)

Identifying a Strategy to Build a Culture of Health for the Latino Community (ID 73285 and 73630)

Advancing the RWJF-NCLR Partnership in Strengthening Latino Voices for Progress in Health and Health Care in a Changing Policy Landscape (ID 74621)

General Operating Support for National Council of La Raza (ID 74693)

University of California, Berkeley School of Public Health, Berkeley, Calif.
Improves population health through radical collaborations to achieve health equity, education that challenges convention, and transformational research on public health threats and opportunities.

Supporting the Convening Community Organizers Project in its Strategy to Grow a Shared Value for Health, Particularly in Marginalized Communities (ID 74199)

University of Pennsylvania Graduate School of Education, Philadelphia, Pa.
A school of education that prepares students to be educators and conducts education research at an Ivy League University

National Program Office for *Forward Promise*

Vera Institute of Justice, New York, N.Y.
Promotes fair and safe justice systems, works with communities to tackle injustices from mass incarceration, and addresses needs of vulnerable people and those harmed by crime and violence.

> Expanding the HealingWorks Network and Building Its Capacity to Implement Strategies to Help Young Men of Color Harmed by Violence and Trauma (ID 74092)

Internally Managed National Program: Tobacco Policy Change: A Collaborative for Healthier Communities and States (PAD)

APPENDIX 2: PEOPLE INTERVIEWED

Victoria K. Brown, MPA
Senior Program Officer, RWJF

John Govea, JD, MPA
Program Director – Immigrant Rights and Integration
Evelyn and Walter Haas, Jr. Fund

Lori K. Grubstein, MPH, MSW, MPA
Program Officer, RWJF

Jennifer M. Ng'andu
Managing Director – Program, RWJF

Maisha E. Simmons, MPA
Senior Program Officer, RWJF