

## Module 2

# Developing Strategy: How Mission and Moment Drive Action

- Understanding Systems Change
- Building a Theory of Change
- Combining Vision, Assets & Urgency

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# WELCOME

## **1 Say hello**

*Your preferred name, pronouns, role, organization, location, and one thing you hope to learn today*

## **2 Camera on please**

*Turn your camera on as you're comfortable*

## **3 Mute**

*Mute yourself when you're not speaking*



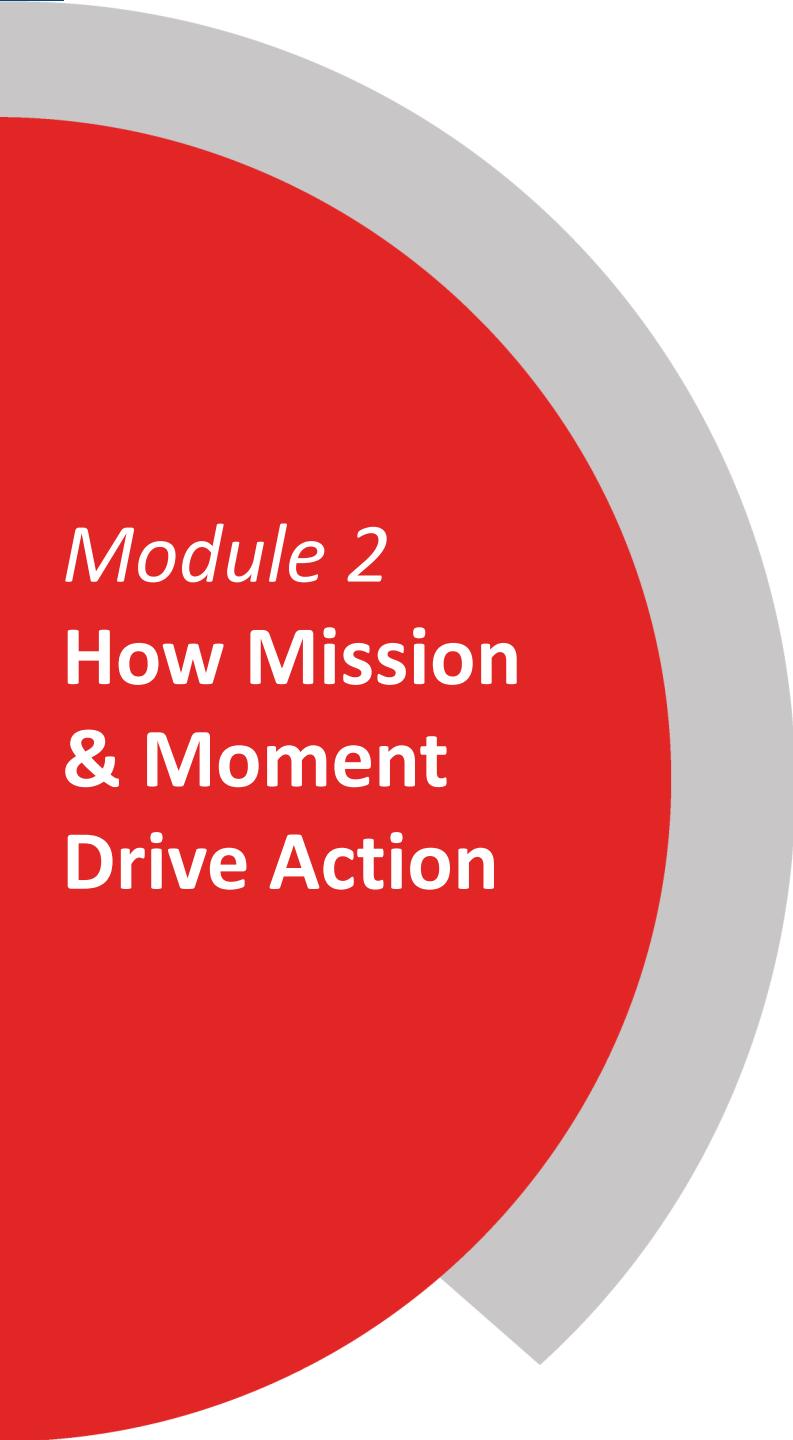
# Meeting the Moment with Advocacy: A Training Series

## Quick Review: Module 1

### *Raising Our Voices: Advocacy for Non-Profits*

- ✓ Working Alongside UnidosUS & Campaigns
- ✓ Assessing Readiness for Advocacy Work
- ✓ What 501(c)(3)s *Can* Do
- ✓ Lobbying vs. Advocacy
- ✓ Compliance Do's and Don'ts

*It's recorded! See the Hub.*



## *Module 2* **How Mission & Moment Drive Action**

*Advocacy can help identify problems and enable action on them.*

### **Learning Goal:**

Developing confidence to use your experiences, assessment, and skills to identify actionable solutions that make systems change for the better.



## Why Policy Change Matters

- Many community organizations are mission-driven and service oriented
- Their programs offer food, health, financial, or other assistance to families in need
- By leveraging what they know about where systems fail, they use their experience, stories, and relationships to work for changes *at scale*
- Ex: Improving how SNAP works at the state or federal level can impact 100,000 or 1 million  
...That's *systems change*.



## Exercise 1

Thinking about your mission, what is the biggest *systemic* barrier in your way?

Now imagine you have magic powers. What would you change to reduce or eliminate that barrier?

*Please share your thoughts on the change you imagine in the chat.*

# What *is* your job, anyway?

CHANGE AGENT

RESEARCHER

ANALYST

SPOKESPERSON

POLITICAL PHILOSOPHER

EXPERT

WRITER

STRATEGIST

NEWS JUNKIE

TRUTHTELLER

DATA JOCKEY

ALLY

LOBBYIST

POLLSTER

GRANTWRITER

COMMUNITY ORGANIZER

MANAGER & COACH

EVENT PLANNER

FACILITATOR

ADVOCATE

STORYTELLER

REPRESENTATIVE

# Could you please solve...

ECONOMIC INJUSTICE

MENTAL HEALTH

POLICE BRUTALITY

HEALTH CARE ACCESS

TECH HARMS

IMMIGRATION REFORM

AFFORDABLE HOUSING

EDUCATIONAL EQUITY AND QUALITY

NUTRITION

VOTING RIGHTS

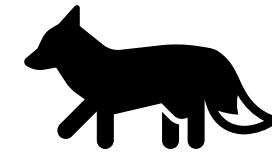
HOUSING JUSTICE

WORKPLACE OPPORTUNITY

RACISM

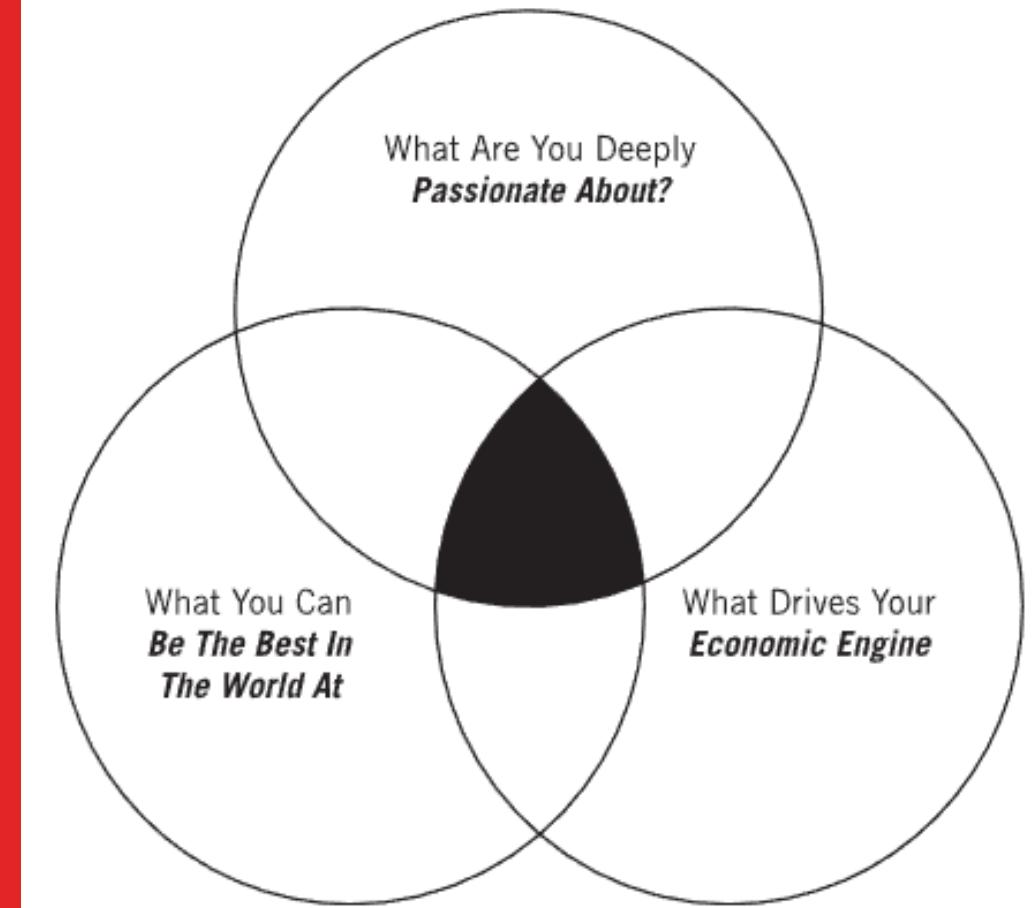
“The fox knows many things,  
but the hedgehog knows  
one big thing.”

--Jim Collins



*Good to Great: Why Some Companies Make the  
Leap... and Others Don't*

### Three Circles of the Hedgehog Concept





# *Focus for Non-Profits*

Strategy is  
choice.





# What drives our work?

**Our mission in life is to... do what???**

- This is the beating heart of everything we do.
- It is how our organization sees itself.

**Do you know your mission, informally?**

- *Please put it in the chat!*



## *Political and Social Context*



A magic formula  
to maximize  
credibility:

**MISSION +  
ASSETS +  
HISTORY +  
DEPTH =  
*DEMONSTRATED  
EXPERTISE***



## Ask: What can we do? With what resources?

- ***Competencies:***

- What assets do we uniquely have in this area?
- Could we be *the best* at doing this? Why?
- What is our history of working in this area?
- What is our “value add” in this effort?

Hint: When we have a big idea and it fizzles, it is likely we misjudged our capacities.

- ***Interest:***

- Do we have a passion for doing it? Support from internal leaders?
- What is the time or other investment required to do it well?
- Can we get funding to do it?

- ***Skills:***

- Do we have the evidence/expertise/knowledge?
- If not, what are the specific skills or information we would need to acquire?
- Can we acquire them in time?
- Is it worth the effort to do so?

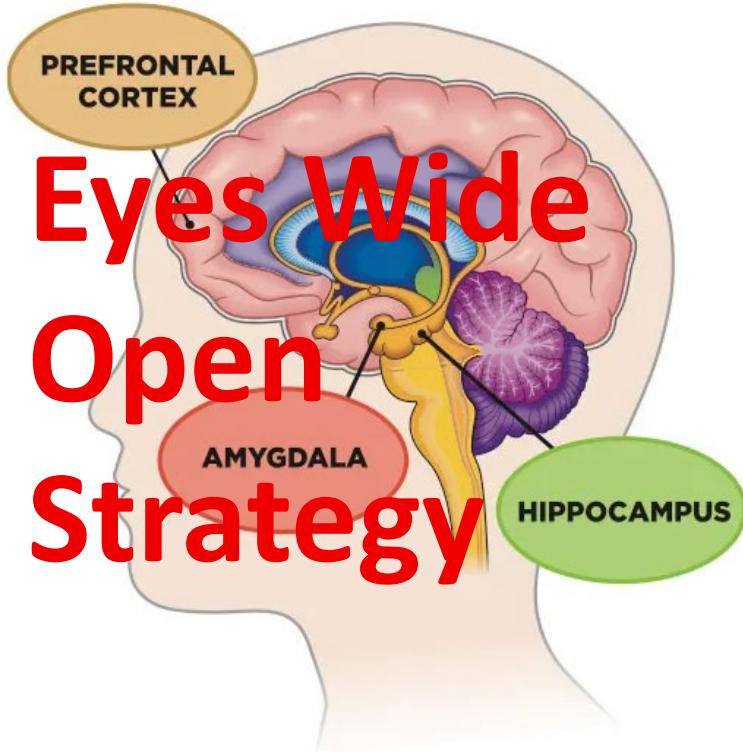
- ***Reach and influence:***

- Are our coalition/allies powerful/trustworthy/aligned with our priorities?
- If not, what would it take to move them?

# Capacities

*(the hidden part of Mission)*

# Strategy Under Stress: *Flight or fight?*



## Their move: FLOOD THE ZONE

- Flight/fight/freeze = “anticipatory compliance”
  - Fear that is demobilizing
  - Jumping to conclusions to protect
    - Overreaction
    - Overinterpretation
- Transactional thinking
  - Fight can we have?
  - Maneuver to avoid conflict?
  - Hide from the needs of moment?

# Assessing Risk Tolerance & Resilience

Think about your institutional resilience & resources. What are your:

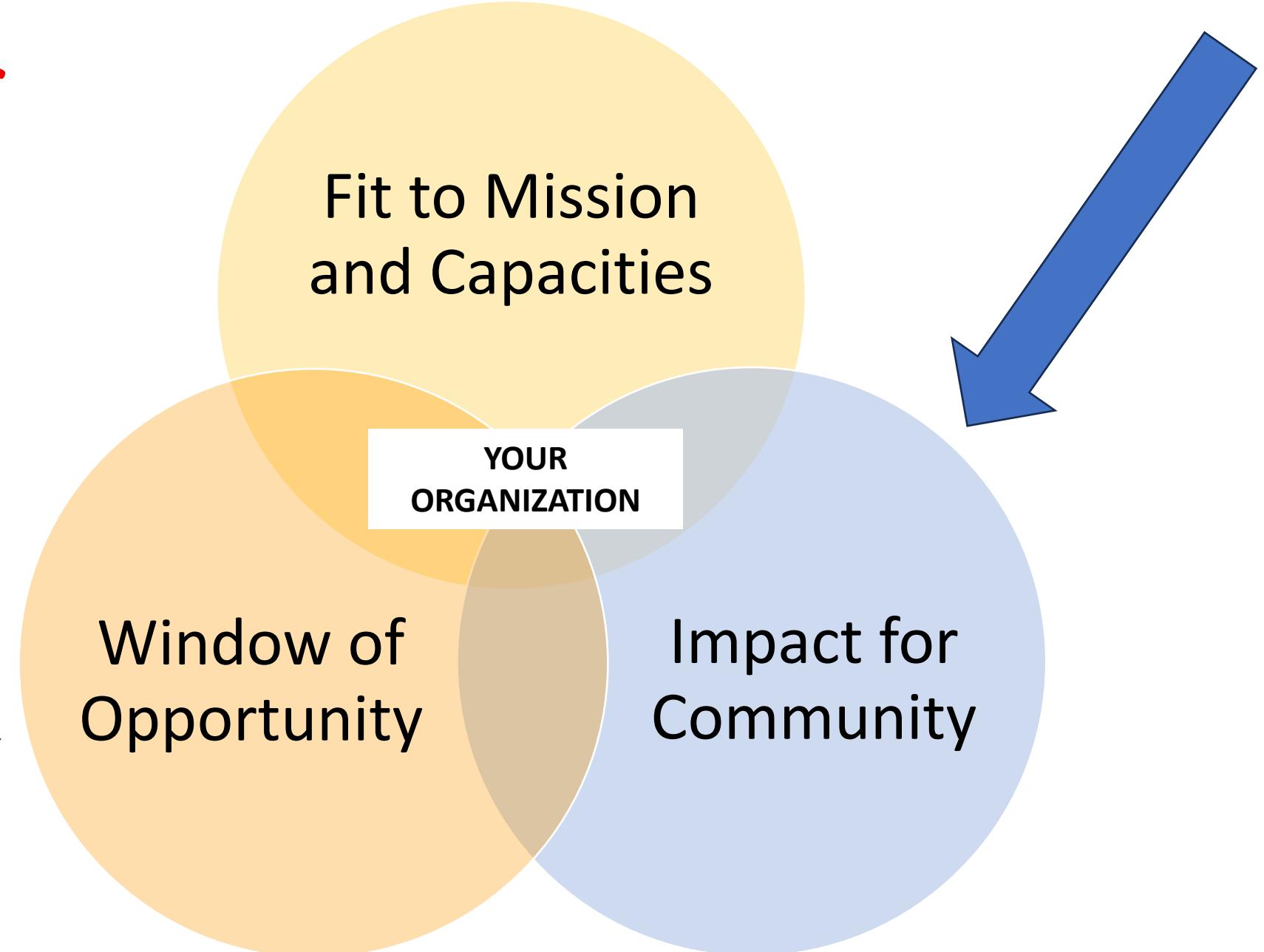
- Financial position and vulnerabilities to funding impacts?
- Internal controls and risk preparation needs?
  - Board and staff tolerance and readiness?
  - Assets—reputational, political, community and funder support?
- Necessity of risk-taking to achieve mission or respond to community needs? Community expectations?
- Specific political and geographic context?
- What's in your toolbox? Realistic options for types of leadership (public, private, practical)?

# Integrating Risk in Strategy

- A risky environment may change your responses to that environment, but cannot be allowed to change your core values, your organizational DNA, or your assessment of what your community needs.
- Unfreeze! Clarify your mission and capacities to build resilience, internal resolve, issue definition, and support your leadership.
- Use your investigation of to inform your **choice of strategy, tactics, and timing to achieve your goal while prioritizing the institutional strengthening you need, so that you can be as bold and clear *as possible* about your vision for change.**



# *Setting Focus for Non-Profits*





# Windows of Opportunity

*Time + Viability + Specific Decisionmakers*

**Time:**

- Are we at the beginning, middle or end of the policy process?

**Viability:**

- What would we need to do to have the political power and tools to potentially win?

**Who is the decisionmaker?**

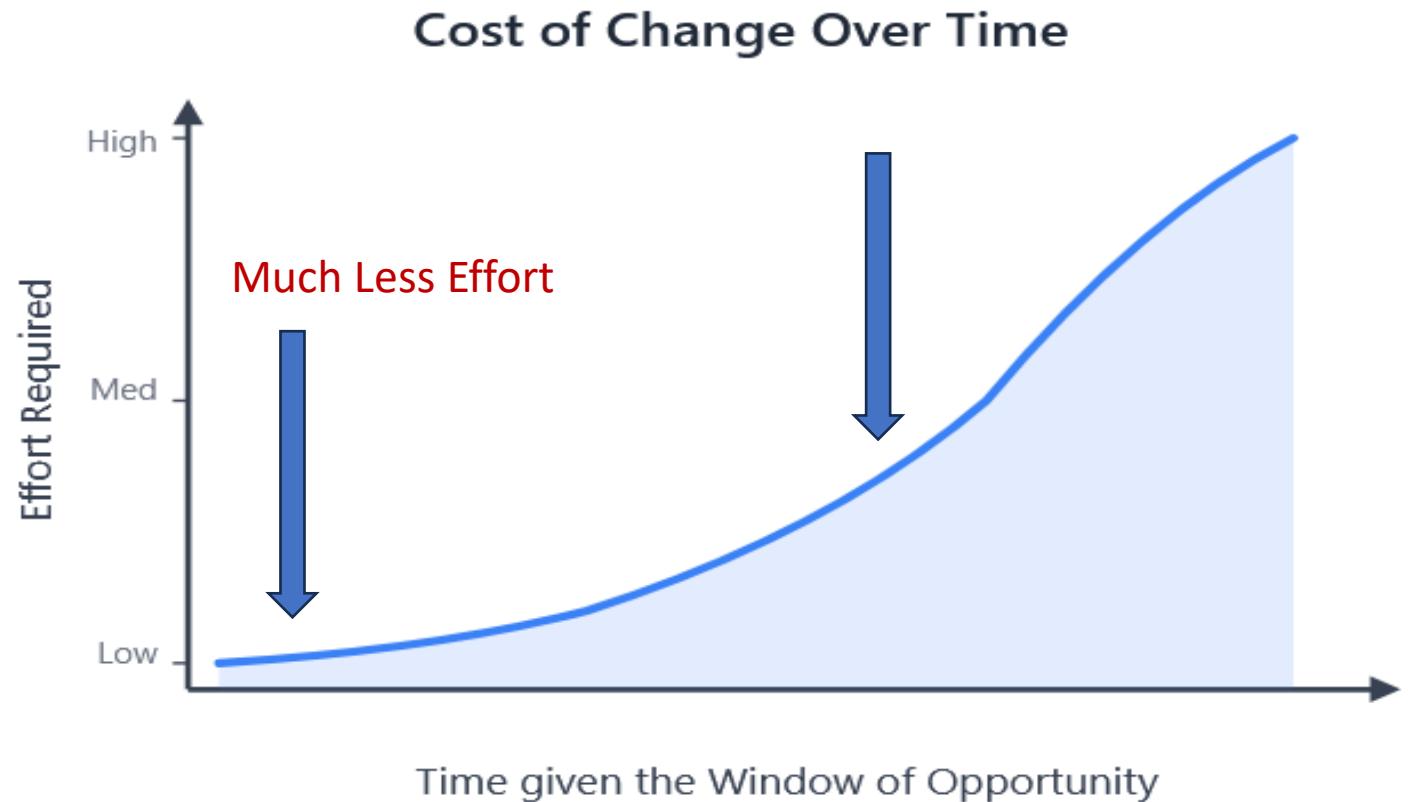
- For ex: Congress, regulators, Administration, courts
- **What factors most impact their decisions?**

**Tools, timing, & authorities (legal; practical)**

- For each decision maker, ask: **Is your policy goal within their power? On their agenda? What motivates them? Context and environment? Why would this rise to the fore right now?**

Windows of Opportunity can be suddenly opened or closed by elections, scandals & disasters.

# Understanding where you are in the policy process is essential for planning

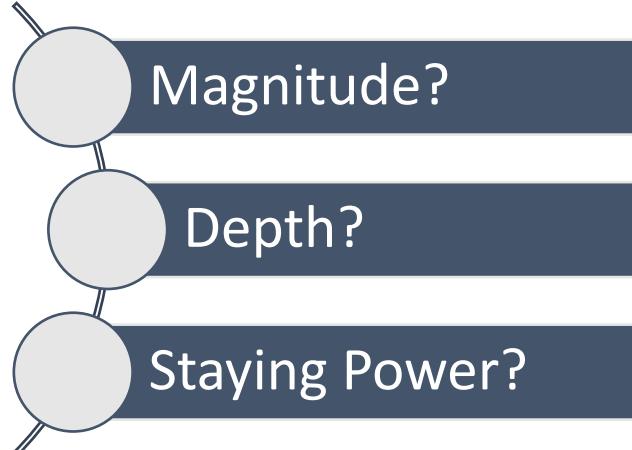


The later a change is made, the more effort it requires to implement.



# Impact for the Community

## The BIG Questions



What evidence do we have/would we need about impact?

What do we need to do for it to have the greatest possible effect?

How does this compare with other priorities?

Is the impact durable over time?

Is the policy replicable/scalable/attractive to funders?

What are the threats to success?

What institutions must see it through? What are their limitations and capacities?

**Does it build community infrastructure and resources?**

**Does it help us better meet needs or build power for next time?**



# *Assessing Viability*

**Who** is impacted? How deeply?

**What** are the politics?

**What** power dynamics help or hurt?

**Who** are the decision makers?

**Who** are the allies? Opponents?

**What** magnitude of change is needed?

**What** are the contingencies?

**What** implementation is needed?

Integrate Data, Process, & Story.





## Exercise 2

*Recall the policy change you identified as the way to reduce or eliminate a major barrier to your work. Ask:*

- 1) Is this at the heart of your mission or capacities?**
  - If not, should it be? Who would you need to convince?
  - What assets do you bring to the effort?
- 2) Is there a Window of Opportunity to make this happen?**
  - Who is the decision maker?
  - What is the timing?
  - Do you already know the rules that apply?
- 3) Is it the most impactful thing you could do?**
  - Why?
  - Is it durable or responsive under the circumstances?
  - What are the questions you have about impact?

*Please make some notes...*

# Your Theory of Change

**Fit to Mission &  
Capacities +  
Window of  
Opportunity +  
Impact**



# A Story of Fit, Vision & Inevitability

## Example:

UnidosUS works on behalf of millions of young and growing Latino families who deserve a safe place to live and a way to grow the American dream for themselves. That's why we prioritize making homeownership possible for working-class families, and we need federal and state governments to make owning a home more achievable. In this year's legislative session, we are calling on California lawmakers to dismantle unjustified zoning laws, provide mortgage counseling and affordable home loans, and allow flexible solutions that families need to build where they live.



# Portrait of an Effective Advocate



- **On MISSION and IMPACT:**
  - Familiar with the decisionmakers and their pressure points
- **KEY SKILLS and ATTITUDES**
  - Intellectually curious about the right to be in the room
  - Observer of human leaders, organizations and the political moment
  - Seeks to build trusting relationships
  - Respectful while being clear about the impacts for people in everyday language
- **OPPORTUNITY**
  - Prepared and grounded understanding the point in time and options
  - Understands alignments and differences with both allies and opposition
  - Organized and mindful of deadlines, processes and the news

# Other obstacles to strategy?

Time

Fear of failure

Attention

Vulnerability

Uncertainty

Lack of Knowledge

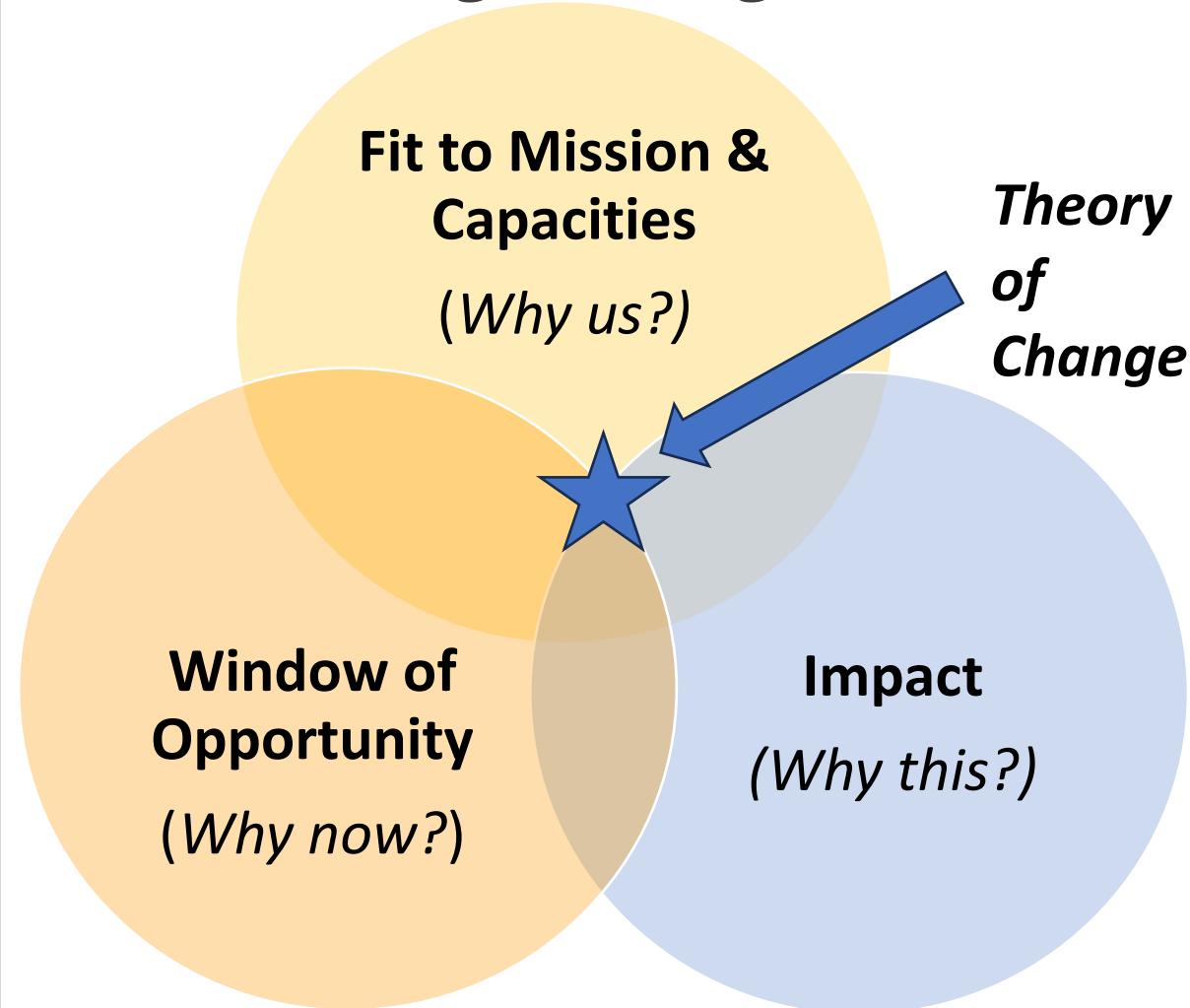
*Whether you win or the systems change you seek – or don’t – wielding a strategic approach will prepare you to react thoughtfully to developments and roll with the changes.*

*“Vulnerability is not winning or losing; it's having the courage to show up and be seen when we have no control over the outcome. Vulnerability is not weakness; it's our greatest measure of courage.” – Brene Brown*

# BREAK-OUTS

- In your break-outs, please take 3 minutes or so to write down a little more about the most important policy change you can think of for your organization. It can be the same idea that you have already identified, or a new one. You can refer to your notes, of course!
- Identify **why it fits your mission and capacities, what is the moment to have the most influence and who is the most critical decisionmaker, and what is your best guess about the predicted impact.**
- Then discuss your proposal with your breakout room partners for 5 minutes. And join us back here after!

# How do I know I'm doing the right thing?



Policy change is situational, timely, and opportunistic. Setting strategy is a muscle.

This strategy will help you be confident *you are doing the most important thing you can do right now*. It doesn't say what to do. It tells you *how to think about what to do*.

Try it on! Putting your assets and vision into a story of practical urgency will make you a better advocate, and everything is advocacy.

Writing it down will surface what you don't yet know and allow you to feel audacious in imagining a better world.

# Affiliate Resources

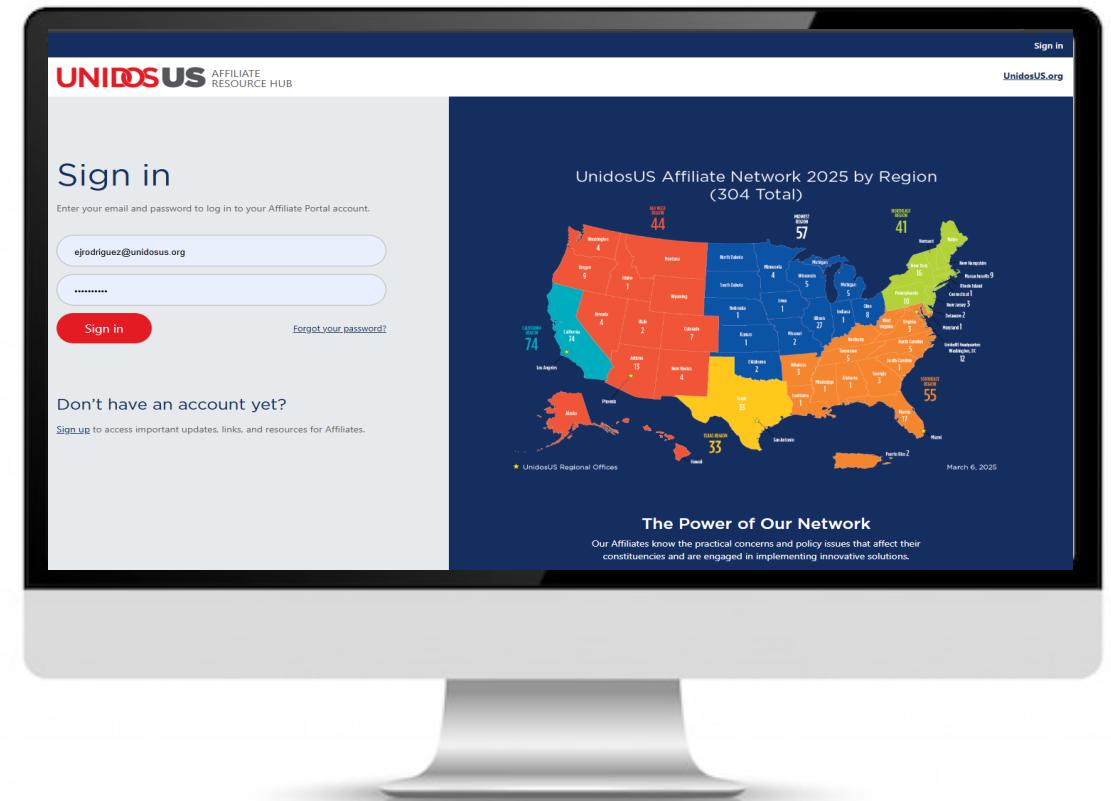
## Why Use the HUB?

Whether you're looking to strengthen your organization, engage your community, or access funding opportunities, the Affiliate Resource HUB is designed to support your mission—all in one place. [Sign up: affiliates.unidosus.org/signup](https://affiliates.unidosus.org/signup)

Already receive the **Affiliate Digest**?

If not—

[Sign up: unidosus.org/about/affiliates/digest-signup/](https://unidosus.org/about/affiliates/digest-signup/)



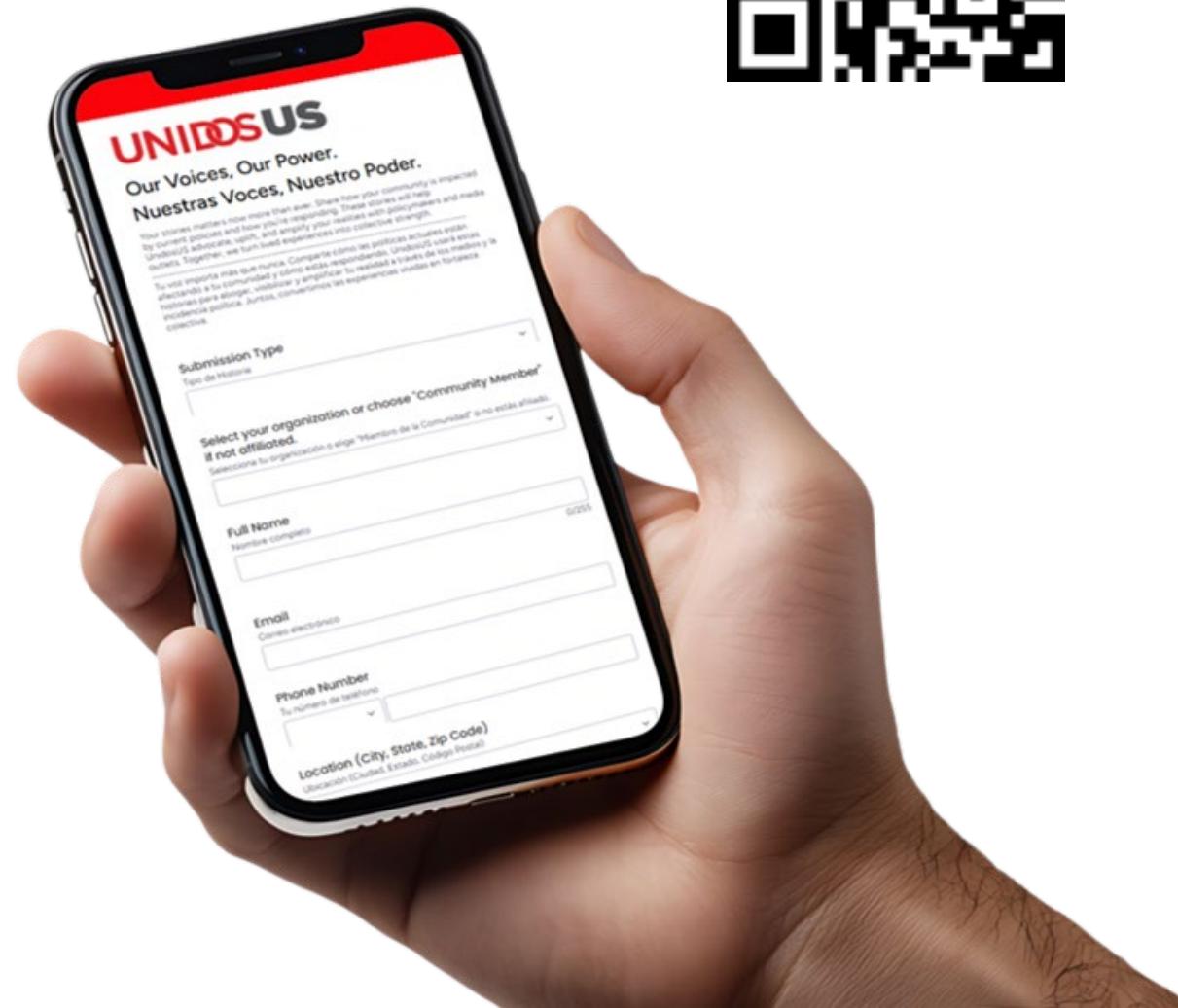
# Share your community's stories

Tell us how your community is impacted by current policies and how you're responding.

UnidosUS is collecting stories to:

- **Advocate** for change
- **Amplify** community concerns
- **Inform** decision makers

*Together, we turn lived experiences into collective strength.*

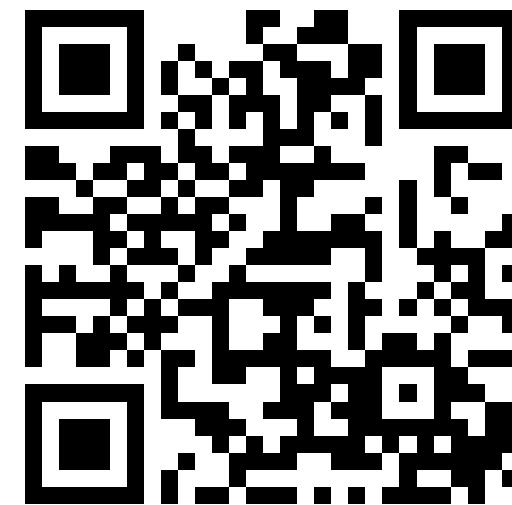




# We want your input!

Your feedback helps us improve future trainings for our Affiliates!

Please scan the QR code or use the link in the Zoom chat to take our survey.



# *Sneak Peek*

## Module 3: Practical Tools for Advocacy



- Tools for emergent strategy
- Setting SMARTIE goals
- Strategy versus tactics?
- Considering specific tools and tactics –and why and when to do each
- Landscape analysis
- Power mapping
- Messaging 101
- Taking on new areas – when and why
- Integrating professional growth into your work

# Questions

