Prosperity Miami Pilot Initiative

White Paper

Scot D. Evans and Natalie Kivell
Engagement, Power, and Social Action Research Team
University of Miami

Introduction

There is a long tradition of social movement and advocacy organizations seeking to mobilize communities and build social justice movements through the provision of services and resources directly to group members. In the early 60's, the **Student Nonviolent Coordinating Committee (SNCC)** built services such as tutoring, child care, adult education, and advocacy into its rural Southern organizing. **The Black Panther Party's** "Ten Point Program" stressed the importance of services to the black community and their Panther Community Information Centers housed such activities as breakfast programs, liberation schools, community newspapers, legal and welfare aid, and clothing exchanges. The **United Farm Workers Union (UFW)** provided services to its members both as a means of building the movement and as a goal through which farm workers would be able to envision the elements of a better society. Their efforts always combined organizing, union business, and service work**. Feminist alternative service organizations** of the 1970s and 1980s were compelled to provide services while they organized to demand an institutional response because they were focused on problems and populations (e.g., domestic violence survivors) who were invisible to the mainstream. These and other groups recognized that in order to realize their social justice goals, simultaneous attention to individual needs and social action to address root causes of individual and social problems was required (Withorn, 1984).

The Prosperity Miami (PM) pilot initiative - a collaboration of Catalyst Miami (CM), New Florida Majority (NFM), and South Florida Voices for Working Families (SFVWF) - is an effort to build on the philosophy and practices of the groups mentioned above. Working collaboratively *across* organizations to blend services and organizing rather than through a singular organization, these partners seek to meet the bottom-line needs of individuals while moving them into political organizing for broader social change. In this paper, we highlight the lessons learned from this attempt at social innovation and provide implications for future similar collaborative efforts. This report compiles results from planning documents, field notes, summaries of the December 2015 formative evaluation discussion and the follow up February 2016 retreat, and group and individual interviews with the leaders, staff, and organizers from the three organizations at the completion of the project.

Before describing the lessons learned from the pilot project, we provide some background and discuss briefly the limits of a services-only approach and the potential for innovative interorganizational approaches that blend services and community organizing.

The Limits of Services and the False Dichotomy of Services and Social Change

Social movement and community practice scholars have long argued that a services-only approach not only redirects limited resources away from political struggle, but also may discourage organizations from using more aggressive tactics that could jeopardize public support for services (Kivel, 2009; Piven & Cloward, 1978). Many worry that most human service work is focused on helping people cope with and rise above the toxic aspects of society while leaving oppressive systems, structures, and the ideologies that maintain them unchanged and undiscussed (Albee, 1986; Gil, 1998; Ife, 2002). Too often service providers neglect an analysis of the broader systemic sources of the problems of the lives of their clients, or have insufficient institutional capacity to address them. In his essay, *Social Services or Social Change?* Kivel (2009) levied a similar critique, arguing that social services do little to address the root causes of inequality and oppression and instead serve to maintain the status quo. Some suggest that transformative change by community-based human service organizations (HSOs) is impossible because they are often too overwhelmed by the intense need in communities and constrained by the political and policy stances of their donors (Bess, Prilleltensky, Perkins, & Collins, 2009; Harvey, 2010; Kunreuther, 2002).

Service practitioners face competing principles, ideologies, and interests while trying to tackle social problems in social contexts that are dynamic and complex. In responding to the problems and needs of the community, HSOs are often faced with difficult choices. On the one hand, HSOs can choose to work for the betterment of human relations, chiefly by providing *services*, supports, and access to resources. On the other hand, HSOs can choose to work for the betterment of human relations *politically*, by engaging in advocacy and social action, to affect the allocation of power and resources. For a variety of reasons, mostly having to do with demands placed on nonprofit human service practice by funding agencies, HSOs generally choose the former. As a result, there exists a forced separation of concern for what is political, long range, and large scale from attention to service activities which must occur every day, over and over again if people are to survive (Withorn, 1984). Services then, are thought to exist to address individual needs, while community organizing groups and movements are to concern themselves with large-scale community and societal changes. Service work and political activity are viewed as separate in purpose and function.

> *"The purpose of organizing is to alter community environments and contexts so they are more responsive to the needs and values of people, whereas the purpose of service provision is to accommodate individuals to better function in and adapt to the circumstances they are confronting." (Christens & Speer, 2015, p. 214)*

This separation has become institutionalized into the very fabric of community practice.

However, many service workers and administrators in HSOs are determined to find ways to combine their broader social justice values and goals with daily human service practice that both reflects and furthers those goals. In an ideal scenario, it is possible and necessary to integrate a commitment to long-range political goals with efforts to alleviate pain and respond to human needs (Withorn, 1984). Good *service work* depends on a broader political vision – or it degenerates into charity that only enhances the power of the service provider and the existing social order. Furthermore, the best *political strategy* must be informed by an awareness of everyday needs in order to maintain its legitimacy. In other words, good services must be politicized and good politics must value and push for services as one aspect of a broad social agenda (Withorn, 1984).

> *"We need to provide services for those most in need, for those trying to survive, for those barely making it. We also need to work for social change so that we create a society in which our institutions and organizations are equitable and just, and all people are safe, adequately fed and sheltered, well-educated, afforded safe and decent jobs, and empowered to participate in the decisions that affect their lives." (Kivel, 2009, p.130)*

History suggests that providing services may help people become more responsive to political ideas and may also allow activists to better understand the implications of their politics. Autobiographies of activists often mention that the first encounter with a movement was through some form of service – an English language class for immigrants or a community health clinic. Such encounters can *build trust* in the movement and help *bring politics* to the real concerns of people. Activists have commented on the many ways in which their political vision expanded as they participated in helping people cope with the strains imposed by daily life (Withorn, 1984).

Gates (2014), offers three lessons related to the benefits of integrating services and organizing. First, services directed at meeting basic needs can enhance individual capacity for leadership. Providing relief creates more space in an individual's life to consider taking on a more active role. Second, services build trust between organizations and vulnerable populations and provides a foundation for future work together. Third, services can be provided in ways to support overall organizing goals. With the right background and training, service providers can help individuals see their problems as part of a larger political and social struggle.

The idea that services can enrich and inform organizing and that organizing can politicize and contextualize services is at the core of the philosophy of the Prosperity Miami Initiative.

Blending Service and Political Organizing Through Interorganizational Collaboration

As the current political economy produces new levels of vulnerability and exclusion in a context of ever-decreasing resources, community-based social change organizations will benefit from exploring new and innovative approaches (Gates, 2014). Much of the research on "hybrid organizations" - organizations blending service and advocacy/social action - has focused on singular community based organizations that have taken on this challenge of integrating services

and social change. Less understood are the attempts to blend these activities *across* organizations as part of a multi-organization collaborative effort.

Coalitions, alliances, and other forms of interorganizational collaboration, are seen as more effective strategies for affecting the broader systems and policy changes needed to promote wellbeing. The basic assumption is that an interorganizational collaboration can mobilize and have a greater impact than could be achieved by organizations acting alone (Taschereau & Bolger 2007) - what Huxham (1996) calls *Collaborative Advantage.* However, collaborations are paradoxical in nature with inherent contradictions and mutually exclusive elements caused by inevitable differences between partners (Vangen & Huxham, 2013). A key concern is the real and perceived power imbalances between partners that tend to have a negative impact on the functioning of the collaboration. Doing social change work in partnership with other organizations is challenging and requires a focus on the relationships between individuals, organizational culture alignment, and the creation of a shared purpose, shared objectives, shared power, and shared responsibility. All this while simultaneously managing the day-to-day activities, operations, and demands of each independent organization. Bottom line: interorganizational collaboration is difficult but necessary for lasting change.

The Prosperity Miami Pilot Initiative

The Prosperity Miami pilot initiative is an effort to work collaboratively across organizations to blend services and organizing to meet the bottom-line needs of individuals while engaging them in political organizing for broader social change. As a collaborative, Catalyst Miami (CM), New Florida Majority (NFM) and South Florida Voices for Working Families (SFVWF) each contribute unique functions that potentially produce outcomes not achievable by working alone. Together they represent the ability to provide for workers' needs, recruit them into issue campaigns around their interests, and the ability to build power to influence government policy and public opinion. CM is the hub for a coalition of human service providers providing a full range of basic needs services to thousands of low-wage workers throughout Miami-Dade County. SFVWF directly organizes workers and low-income residents, and NFM educates and mobilizes residents to participate in the political system.

Theory of Change

Through the partnership, a core set of services (such as financial coaching, financial products designed for low-income families, access to health insurance) are offered by CM to new populations (Prosperity Campaign services). The stabilization of low-wage workers provided by these services create greater incentives for participation at the level of membership and leadership in SFVWF and NFM. This "functional ladder" of membership integration begins with point of contact (through phone calls, community outreach or voter contact through door-to-door canvass) to membership and leadership in NFM, SFVWF, and CM. Ultimately, these activities will lead to increases in individual membership overall (breadth) as well as activist leadership within organizations (depth).

What is in this Report

This report is comprised of data collected throughout the pilot year and includes an analysis based on field notes, meeting notes, canvassing data and final individual and group interviews with all staff and leaders in the PM project. All data was collected and analyzed by a researchers from the Engagement, Power, and Social Action (EPSA) research team at the University of Miami. Direct quotes from interviews are included to help illustrate and support sections of the report.

What follows is a brief overview of pilot activities, examples of modifications that were made to the model, as well as lessons learned. Finally, the report will conclude by outlining perceived benefits and recommendations for future action.

The findings presented here are somewhat limited in that researchers collected data only from leaders and staff of partner organizations involved in the pilot. There are no data from residents on their perceptions of the project or their understanding of the benefit to themselves of their community.

Pilot Activities: What Was Done Together?

Over the course of the project, the PM organizations engaged in independent and collaborative efforts such as canvassing low-income neighborhoods, hosting health fairs and other events, and providing direct services. A total of 18 events were held across NFM and SFVWF with a total of 186 attendees at these events. From this, 65 people were registered for services. While it is somewhat challenging to disentangle activities that were unique to the pilot from those that are part of each organization's regular activities, the information reported to us points to the following forms of engagement.

- Number of events: 18 (total)
- Number of attendees: 186 (total)
- Number of doors knocked on: NFM (2829) SFVWF (4810)
- Number of conversations had: NFM (2919) SFVWF (671)
- Number of referrals/interest for services: NFM (184) SFVWF (108)
- Number of people who accessed services: According to Catalyst 65 (50 health and 15 wealth)

Of note is the apparent low transfer of "doors" to "services". Using these numbers, 7639 doors were knocked on which resulted in a 4% rate of "referrals/interest" for services and a less than 1% rate of people who accesses services at Catalyst.

Formative Evaluation: December 2015

At the end of 2015 the PM team came together for a strategy session to discuss challenges and successes and to suggest modifications for the second part of the pilot through to June 2016. A

formative evaluation summary was drafted that covered the discussion on what went as planned, what did not go as planned, what was learned and modifications that had been made or needed to be made to ensure success.

PM Retreat "Reset": February 2016

In February the organizations held a retreat as an opportunity for the leaders and key staff of the three organizations to come together to discuss the overall project, specific challenges, and next steps. It is important to note that this was the first meeting of key stakeholders after the death of SFVWF executive director Kit Rafferty. Several of the themes from this retreat will be included in the final analysis sections below.

Modifications

During the year, modifications were made to address the challenges faced by team members. These modifications emerged both organically to meet the needs of the project as well as more strategically from the December and February gatherings. One important note here is that some stakeholders think they the model was not given enough of a chance before modifying it.

Many of the modifications directly related to how the organizers/canvassers did their job. These modifications involved more directly connecting services to on the ground organizers. For example team members **developed a scheduler for organizers to connect residents to appointments with Catalyst**, PM staff started **weekly strategy calls between Catalyst and NFM/SFVWF,** and the data collection/canvassing **survey was simplified** to meet the needs of the organizers.

Through these modifications, more residents were able to access services: "*I would say the improvement in the last couple of weeks in how many people actually got services...that was one of the best improvements.*"

However, **many modifications that were proposed, were not implemented.** Many of the modifications suggested during the formative evaluation such as "*rethinking fairs*" and "*thinking beyond fairs*" were not implemented as staff was not clear on what this meant or how it could be done. Similarly recommended modifications to provide training for organizers/canvassers and to partner with other organizations with their respective membership bases were not implemented.

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Lessons Learned

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Throughout the PM project, there were challenges faced and lessons learned. Below we highlight eight lessons in three categories: 1) Lessons about the model; 2) Lessons about implementation, and 3) Lessons about collaboration. These lessons illustrate the team's understanding of collective work in general and the current model in particular. These lessons will inform the recommendations at the end as they provide a rich analysis of the understanding of team members on the potential of this model.

Lessons About the Model: *"I Think the Potential is Still There"*

The PM model continues to inspire and challenge team members. Team members fall on both sides of the proverbial fence, with some continuing to believe in the potential of the model, and others believing that the model is fundamentally 'anti-organizing'. The lessons outlined below provide a rich understanding for moving forward beyond the pilot phase of the PM project.

 Lesson 1: Organizing takes a back seat. The first, and perhaps most important lesson learned was the difficulty in addressing the inherent disconnect between service delivery and community organizing as this process saw a strong pull towards service provision. This pull both in the vision and in the implementation towards the tangible outcomes of service provision worked against the organizing aspects of the project.

> *"Catalyst's team is aware of the disconnect, it's just really hard if, you have this vision but we also are being held to, um, these metrics for this grant, so Catalyst team in their defense is like we have to meet these numbers because this is what our grant says we need to do, so how are we gonna do that versus this unicorn"*

Some team members took it one step further, and articulated that the underlying purpose for bringing services to residents that they are hoping to organize was counterintuitive stating that: "*comfortable people never want a revolution*".

Along with this line of thinking, PM team members highlighted one of the reasons that this pull towards services might be happening, even with the current innovative model: **When you are seen as providing services, you get pegged as a Social Worker**. The organizers from NFM and SFVWF became the face of service delivery through their door knocking and canvassing and in turn, they, along with their organization, got pegged as social workers. Residents began to come to these organizations for their service needs and it became challenging to shift into broader political conversations and engagement. It was questioned: how might this new perception of residents limit the organization's ability to organize in their communities across future campaigns?

 Lesson 2: A need for shared problem framing and a shared understanding of terms. The second core lesson that emerged from the interviews and process of the PM pilot project surrounded confusion and discrepancies in how organizations and staff framed and discussed the issue, purpose, and implementation of the project. Team members continued to define and frame issues and terms differently, causing confusion. For example, some staff defined organizing as 'voter registration', while others defined it as building collective power. Additionally, the problem that the PM pilot was trying to address (its reason for existing) was defined differently either as addressing individual needs, or as addressing a broader collective issue of justice.

> *"if we knock on someone's door, and say "hi, how are you? We're starting part of a revolution. Would you like to be part of it?" What are you even talking about? We do*

have to start with the smaller things. But our smaller things are things like what about gentrification in your neighborhood specific to you but it leads us to something that's larger than themselves. Catalyst is "do you need food stamps?" on that individual basis."

The need for space to discuss problem framing and shared language is a key learning for moving forward.

Lesson 3: Organizing for what? The final lesson learned in this category was that it may not work to do **"civic engagement for civic engagement sake."** Having people become engaged just to be engaged proved to be difficult and unsustainable.

"Now, I think that, that one of the reasons why there's been a challenge is because (pause) we're not, we're not, like, organizing people towards something…like, like civic engagement for civic engagement's sake is, isn't very meaningful."

Overall, these lessons help to illuminate key challenges with the current model and can move the collective PM work forwards towards a more conscious and collective process for social change.

Lessons About Implementation

Moving an idea into implementation comes with its own set of challenges. Throughout the implementation phase of the PM pilot, lessons about purpose and process were learned that will inform future understanding of how to blend service and organizing work.

Lesson 4: Lack of shared understanding of "purpose."

"the whole point is civic engagement and resident mobilization".

Planned purpose. The initial planning document targeted four goals/purpose statements for the Prosperity Miami pilot initiative which included the following:

1. Increase connections with residents in targeted zip codes (reach those typically not reached).
2. Increase number of households with access to healthcare.
3. Increase number of residents who access financial services.
4. Increase engagement in civic life: "Lead with organizing"

"I feel that since the beginning the thinkers and the visionaries for this campaign were having this vision that we kept coming back together to reassess and revisit … like, focus on organizing, this is about organizing, like, lead with that … the visionaries were not in the implementation conversations, and I think that there was, like, a huge cultural gap… so the lofty conversation stayed in the room whenever it became the actual practice"

Purpose confusion: Leading with services or leading with organizing? This vision was outlined on paper and in planning conversations, yet many on the PM team remained confused about the purpose that was driving their work. This confusion manifested in two ways: 1) Team members framed the mission as "leading with organizing" but did not know how to implement it; and 2) Team members framed the mission as "leading with services." There was a general understanding that the project funder was most concerned about services.

At the leadership level there was some consensus that the purpose was to lead with organizing, **yet the project implementation remained focused on services**, **rather than mobilizing residents**. The project was consistently framed as a Catalyst project or a "service thing".

> *"I did my best, uh, definitely I started with the priority, we always make sure that we, we start with the priority, the priority was getting the people those services first and then, you know, later on, organizing to the bigger and broader vision."*

Team members discussed this purpose confusion as arising from **a lack of shared vision, a failure to learn each other's organizational culture** (service delivery versus an organizing model)**,** and insufficient time at the front end for developing **shared language or co-creating a plan** that fit with the skills of the organizations and the needs of the community.

> *""I kind of felt like if we would have focused on the process and really kind of truly understood all across every organization what actually was the thought process behind even, you know, getting this project started, would have really helped people out."*

 Lesson 5: A need for organizational role clarity. A key challenge in moving from vision to implementation was a difference between **perceived and actual roles** of individuals and organizations. The most important of these factors came down to how each organization framed their relation to each other. One framing had Catalyst as the lead organization who then subcontracted two organizations to complete particular aspects of the project. While others framed the three organizations as working in partnership as relative equals. Both of these partnership structures were discussed by team members as the way things were and/or were supposed to be.

Regardless of intended roles, the funding structure impacted the working relationships of the three organizations. NFM and SFVWF, who were not directly responsible to the funder, were seen as feeling less urgency in completing the project as planned, while Catalyst, who had a direct link to the funder felt a deep urgency to reaching all project milestones. This disconnect and role confusion created tensions between and within partner organizations.

 Lesson 6: Things don't go as planned. Much of the year-long pilot did not go as planned. Some of this deviation from the plan was strategic, based on two re-convenings with the PM team to debrief and modify the plan in December and February. Other modifications were due to issues related to a lack of a shared vision, shared language or shared problem framing. The key themes discussed were: The **difficulty of turning door knocks into event attendees** and numbers of

people accessing services, **changing the number and frequency of events** in communities, and **the time it took for everyone to "get it together"** because it was a new concept and way of working for everyone. One additional major disruption in the experiment was the **passing of Kit Rafferty** the leader of SFVWF in December of 2015. The vision and passion of Kit was an essential aspect of the PM experiment, and with this sudden loss the PM experiment was put on hold through the new year.

Lessons About Collaboration

Doing collaborative, interorganizational work is hard. The PM pilot helped to illuminate some key features and challenges of this type of work and contributed to the learning process for the partner organizations. The following lessons can and should inform future PM work as well as future collaborative work outside of the PM model.

Lesson 7: Be more comfortable taking risks. The first lesson on good collaborative work focuses on the need to compromise and embrace risk. Team members discussed the need to work together towards compromises that better fit the needs, skills and goals of each partner organization. Risk aversion by Catalyst and the disconnect between theories of change held by Catalyst and the organizing models used at NFM and SVWF hampered relationship building and taking chances that were needed to push the boundaries of this pilot project.

> *"There will be people [at the events] that will need the services, we cannot prescreen them, many we do not know who they are, but once they're there, and good chunk of those folks will probably need services, and I think the numbers would have come higher if we would have been a little more risky."*

Lesson 8: Collectively challenge and surface assumptions of collaborative structure. Although each collaborative project will have its own structure, purpose, and partnership plan, good collaborative work needs to be collectively unpacked and assumptions about the chosen collaborative structure need to be surfaced and challenged and collectively understood**.** This is important when trying to understand why some of what we do works, and why some of what we do does not.

The particular aspects of this collective process work that emerged as learnings from staff on the PM project lesson included: 1) questioning and **clarifying the role of Catalyst** as a partner or as the boss, which impacted buy-in from partner organizations and issues of urgency in meeting project goals, 2) understanding the need for **increased curiosity and understanding of each other's organizations and theories of change** as impacting the ability for organizations to work together, 3) building in **more time and resources for work on the front end** to develop shared expectations of where to start and how to develop the project based on needs of the communities served, and finally 4) **hiring an external driver or project manager** from outside the partner organizations to help drive the process, support relationship development and trust while ensuring that the vision and mission remain centered in project implementation and activities.

Prosperity Miami: Perceived Benefits

The most common response to the question "What specific successes were achieved as part of this effort?" was: "**we learned some stuff**." The major success of this experiment was the learning achieved and the development of a clearer understanding of how something like this might succeed in the future in the Miami community. The specific learnings are outlined above in the detailed section on lessons learned. In addition to these lessons, the final interviews revealed perceived 'wins' at the organizational, interorganizational and community level as a direct result of the PM project.

Wins at the Organizational Level

For long term success of a collaboration it is important for each organization to see the benefit to their own capacity and work. There were a few perceived organizational benefits that arose from the PM experiment.

   Increased credibility and 'brand awareness' of the organizations in new communities. PM partners were able to spend more time in their communities and in new target neighbourhoods bringing their services and power building processes to new people. Staff and leaders discussed the new connections and increased knowledge of their organizations because of the PM project.

   "I think our intent was to get community or residents enrolled in health services, different services, but out of this program I think we've connected with, we've educated a lot of residents, you know, around all of our programs that we offer here, so the residents are aware, you know, they now know what each organization does"

   Influx of data to use for future relationships building in communities. The canvassing work done by NFM and SFVWF successfully collected a lot of helpful data from residents across communities. That information was framed as a win as much was learned about particular targeted communities and the organizations now have data and relationships to build upon for their future work.

   "To me, what happened, what did work out and this is like all self-interest, we had like more than six hundred surveys filled out with people's information, building our list, we have emails, we have contact, we have been building some relations with these folks, we have engaged folks in some of, so I think that for our purposes of actually being out in the field and getting, doing outreach, was great"

   Building up the organizational base. Some residents were engaged into the political work of the organization through canvassing for PM and through participation in events and service delivery. The data collected from residents during the project can now be used to continue to engage people into the movement work.

Wins at the Interorganizational Level

A key win that was shared at the interorganizational level was that of relationships building across organizations and across particular staff of each organization. These new relationships and levels of trust were seen as grounding for the long-term collaborative work of the partner organizations. Staff from the partner organizations shared that they were glad to know Catalyst was there and were able to connect people to Catalyst services beyond their PM canvassing. KNowledge and relationships have already and will continue to strengthen the work of these three organizations.

Wins at the Community Level

Finally, there were perceived wins at the community level. These wins were for directly impacting residents of the neighbourhoods engaged in the PM pilot.

   Did outreach and provided services to residents. Although the desired numbers of the PM project were not met, 65 residents were provided services and many more residents were engaged in the organization's work more broadly with 1000's of doors knocked on and conversations had about the PM project. In addition, services beyond catalyst were provided through new connections in the community and referring to other organizations such as legal support and job training.

   Built trust in the community for future "movement work." The work that went into door knocking and holding conversations with 1000's of residents from across Miami was perceived to lay the groundwork for future movement work. Residents now know the names, visions and faces of organizations and particular organizers. An initial level of trust is assumed to have been built.

   "Making sure that we're going there and being able to provide them with something before just trying to say come join the movement, um, kind of meeting people where they are, and being able to provide those service."

These perceived benefits were the tangible outcomes outlined by staff and leaders in reflection on the year of learning and experimenting with the PM project.. The benefits along with the previously outlined lessons inform the next section: Recommendations.

Recommendations and Implications for Future Collaborative Efforts

Through the interviews many recommendations for next steps and future collaborative efforts emerged. Ideas for recommendations are not always shared by everyone: some team members say we need to go back to the drawing board, while others think we need to take the original vision and develop an implementation plan that appropriately tackles it. However, even without consensus, the modifications to the collaboration and model from interviewees are worth considering in future efforts. They are as follows:

- Develop a shared glossary of terms to create a collective understanding of the issues being addressed and the vision for the current project;
- Hire an external project driver that is not attached to any of the partner organizations;
- Give the model a fair shot. Figure out what it really means to 'lead with organizing' and try again;
- Include other organizations at events to have bigger pull and broader services to provide to community;
- Take time to understand different needs in different communities and meet them where they are;
- Create a partnership structure with mutual engagement rather than a lead/ subcontractor relationship;
- Go where people are already organized and bring services to them.;
- Be mobile and provide services in homes, or at house parties;
- Think outside the box as service providers to better meet the needs of the communities; and
- Have Catalyst staff be a part of the organizing to build skills, understanding, and personal connections in the community.

Drawing on these recommendations offered by staff members and on the lessons that emerged from the data collection as well as our own engagement with the project and some relevant literature, we humbly offer these three overarching implications for developing and implementing interorganizational collaborations to blend services and community organizing.

Build and Maintain a Shared Analysis, Vision, and Theory of Change

In the Prosperity Miami pilot initiative, participants expressed a lack of clarity of purpose and confusion with regard to whether the project was leading with services or leading with organizing. This confusion stems from the absence of a clearly understood vision and theory of change that everyone helps to co-create and understands, buys into, and revisits as new learning emerges.

In order to be fully ready for this type of interorganizational services and organizing collaboration, participating organizations need to develop a shared analysis and shared vision that speaks to how their individual organizational efforts will contribute to the overall vision. This requires building a shared theory of change that is based, not only on their specific individual and organizational skills, expertise, experiences, and organizational functions, but also in an understanding of the functions and histories of the partner organizations who are seeking similar goals through different approaches (e.g. service provision, advocacy, organizing). Members of collaborating organizations need to come to see themselves as partners in a broader movement for change. The resulting analysis and vision is something that the group constantly revisits and discusses as a tool to assess the effectiveness of their collaborative strategies and activities.

Building a shared analysis and vision also requires understanding and paying attention to different organizational cultures and "practice frames" operating across organizations. We know that the most significant factor preventing collaborative solutions from achieving their goals is the existence

of differences among stakeholders in their frameworks of understanding related to how they conceptualize the problem that links them and how they feel the problem should be resolved (Nowell, 2009). Garrow and Hasenfeld (2014) describe practice frames as how we understand "clients" problems, the causes or diagnosis of the problems, the desired outcomes, and the means to attain them" (p. 85). For a variety of reasons, service organizations traditionally operate from a "services access frame" in that they view lack of access to services as the problem and thus respond by providing services directly (e.g., food, shelter, healthcare, financial services), or through case management that links the client to available resources. Political and advocacy organizations typically operate from a "structural-change frame" and work to address discriminatory or inequitable conditions through advocacy, community organizing, and social action. Developing a shared understanding of these frames and how each organization can contribute to a broader movement for change is key to constructing work together that draws on the strengths of each organization to achieve their collective goals.

Build and Maintain Interorganizational Structure and Adaptive Capacity

Social change organizations face different decisions and dilemmas when building creative and flexible interorganizational collaborations, and developing staff who are able and willing to work with others interested in creating broader movements for change. While the partner organizations in the Prosperity Miami pilot initially expressed a commitment to internal staff development with a focus on staff alignment with the mission of the initiative and functioning as a collaborative, there is little evidence that this actually occurred. Individuals involved need to look beyond the specific objectives of their own organizations and programs toward bigger goals related to their missions. This can make it hard to sustain collaborations, as participants inevitably feel pressure from their organizations to bend collective work so it is more in line with their own priorities – often due to external pressures and funding constraints.

The traditional structure of nonprofit organizations and the individual skills needed to run programs do not necessarily facilitate effective interorganizational collaboration for broader change. Collaborations need to be structured and managed differently. The establishment of an overarching organizational structure and processes to guide collaborative functioning in communication, decision-making, and conflict resolution is an important factor in the success of collaborative entities (Kegler, Rigler, & Honeycutt, 2010). Additionally, the individuals involved need to come to the work with an understanding of how to create and sustain the conditions for collective thinking and action. Building capacities in areas ranging from managing multi stakeholder decision making, to designing effective group processes (including effective meetings) is important. Another capacity that is critical for successful collaborative work such as this is a network mindset at all levels of participation, so that people are always testing out new ways to share power and responsibility (Grantmakers for Effective Organizations, 2013). Organizations that are members of a collaborations such as Prosperity Miami also need to understand the key roles that support the collaborative's ability to succeed, identify the right people to fill them, and provide the appropriate structures and supports.

All this means, that organizations and individuals involved in collaborative initiatives need to approach the work with a high level of "adaptive capacity." Adaptive capacity refers to "the ability of a nonprofit organization to monitor, assess, and respond to internal and external changes" (Connolly & York, 2003, p. 20). In other words, the key to success in collective action is evaluating how the work is going, on a steady basis, and then using that information to change course as needed.

> *"Underlying successful collaborations is a different kind of logic. It's not about knowing and expertise; it's about helping things emerge and responding successfully to change," (Curtis Ogden, Interaction Institute for Social Change.)*

Adaptability and flexibility are especially important in an effort such as Prosperity Miami because it is hard   to predict how this type of collaborative innovation will evolve. Setting the stage for adaptability and flexibility requires building "collaborative capacity" in and across organizations - creating adequate conditions, enabling systems, and structures (e.g. meetings, check-ins, evaluations, etc.) to assemble and coordinate the specific elements necessary for collective learning and action (Goodman et al., 1998).

Lastly, stakeholder relationships are an important aspect of interorganizational capacity for supporting the effectiveness of a collaborative seeking systems change outcomes (Nowell, 2009). Paying particular attention to the quality of relationships among their stakeholders is critical. While the leaders of CM, NFM, and SFVWF had developed relationships and a degree of trust over time and therefore had some pre-existing social capital on which they could build, more work could have been done to build relationships and trust among the other actors involved in the Prosperity Miami pilot initiative.

Lead with Services; Lead with Organizing

As we stated in the introduction, good service work depends on a broader political vision and the best political strategy must be informed by an awareness of everyday needs in order to maintain its legitimacy. There are many who believe that an integration of services and organizing is critical if we are to build grassroots movements for change. The Prosperity Miami pilot revealed some uncertainty as to which "action" takes the lead – services or organizing? Initial planning documents and conversations suggested a model where services take the lead: "meet the bottom-line needs of workers, while moving them into worker and political organizing." Catalyst Miami's "Prosperity package" would also serve as "functional membership benefits" for NFM and SFVWF members - building loyalty of existing members through access to benefits. However, much of the discourse and planning after the start of the pilot conveyed the message: "lead with organizing".

A model of "functional organizing" proposed by Peter Murray (2013) makes a case for leading with services if the goal is to build membership. Through studying organizations such as the NRA, AARP, megachurches, unions, and trade associations he discovered that providing benefits and services to cater to the everyday needs of their members gave people a practical reason to join and remain

active in the organization. Although one can imagine that some join these organizations for the *cause* and then take advantage of *services*, while others join for the *services* and then get active in the *cause*. Functional organizing may be less about the order in which people engage in services and organizing and more about the skilled integration of the two.

While much of the confusion in Prosperity Miami can be chalked up to the lack of shared vision and theory of change discussed above, it is worth highlighting that staff members involved in the pilot were, perhaps unwittingly, reproducing the assumption that service work and organizing activity are separate in purpose and function, not embracing the powerful potential of an integrated approach. The most effective approach may be to lead with services AND lead with organizing - effectively integrating their efforts so both are happening simultaneously; complementing each other. People accessing services get the help they need while also getting nudged to see their problems as part of a larger political and social struggle and become active in leadership development and organizing. At the same time, members of organizations engaged in community and political organizing can receive benefits and services that provide some stability that simultaneously builds loyalty to the membership organization, and the movement. This integrated approach was implied as the ideal in early planning documents but never fully baked into the design and implementation of Prosperity Miami. Obligations to the reporting requirements of the lead funding agency may have also contributed to inhibiting this integration.

Conclusion

Many researchers and practitioners have made the case for the role of community-based organizations in local political systems. Community-based organizations can leverage power and resources by mobilizing constituencies that benefit from the services they provide. There is good evidence that the focus of community-based organizations has shifted over time from grassroots advocacy to services and program implementation (Stoecker, 1997; Bockmeyer, 2003; Newman and Lake, 2006). As a result, the role of grassroots advocacy has been diminished in community-based organizations. Bringing services and grassroots political organizing together through interorganizational collaboration is one way to allow organizations to do what they do best and contribute to a larger whole. The Prosperity Miami pilot initiative has demonstrated the potential of this approach and also revealed important challenges in implementing this vision. While these implementation challenges prevented answering an overarching question - "does combining services and civic engagement recruitment makes people more likely to both enroll in services, and get involved/become members of our organizations?" - the lessons learned from this pilot offer insights into how to better structure and support innovations like this in the future.

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