STATE STRATEGIES FUND

Report on Six Emerging Collaborative State Projects

Building long-term capacity in Maine, Michigan, Minnesota, New Mexico, North Carolina and Wisconsin

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It is one of the happy incidents of the federal system that a single courageous State may, if its citizens choose, serve as a laboratory; and try novel social and economic experiments without risk to the rest of the country.

Justice Louis D. Brandeis, New State Ice Co. vs. Liebmann, 1932

INTRODUCTION: WHY STATE-BASED INFRASTRUCTURE?

For those of us dedicated to achieving an America 'with justice for all, 'our future course to advance the common good may lie in working in states. Historic movements for greater justice and equality that have shifted the course of our country have often incubated as state-based reform efforts. Public policies that advance the common good by strengthening and expanding participatory democracy, reducing poverty, improving health care and education, extending the rights of minority groups, and preserving and protecting the beauty and health of our environment have all incubated in the states. To fundamentally change our country, we must change our states.

Our vision is public policy and leadership – based on values of equality, freedom, participatory democracy, community, justice, human rights, and reverence for nature – taking hold in the states and spreading throughout our country. States can move innovative ideas, policies, and strategies to the national level, particularly when the national political will is divided and incapable of producing bold departures, by serving as illustrative exemplars, building the cumulative clout and political momentum to compel changes on the national stage, and launching nationally significant leaders. The goal of the State Strategies Fund is to support capacities in states based on values that lead to a worldview that is fundamentally different from the one that dominates public discourse today; offering an alternative to the fear and division-based "you're on your own" philosophy of the right-wing.

Many state organizations that began as pressure groups to advance progressive values found themselves out-organized, out-funded and entirely on defense by an onslaught of well coordinated attacks from the right. Over time, this experience has changed assumptions of how state groups need to operate, yielding the insight that no single issue, organization or constituency is capable, in isolation from others, of galvanizing the kind of critical mass needed to fundamentally shift a state's direction toward enactment of progressive values and public policy. Exciting new ventures led by state activists aiming to realize long-term, comprehensive social change have emerged over the last two years. These efforts are beginning to generate promising results and important lessons, and demonstrating what is needed in a state to build integrated progressive infrastructure to scale.

Recognizing that no single accomplishment on any given issue or within any given election cycle can, of itself, lead to the broad-based, lasting social change our country requires to realize the promise of our democracy the new State Strategies Fund aspires to support project that are collaborative, long-term,

nonpartisan, multi-organizational plans for state-based infrastructure, based on objective research, and comprised of a common vision, coordinated activities and messages that cross the customary boundaries of organization, issue and constituency, and that have the potential of adequate resources for long-term sustainability.

EMERGING COLLABORATIVE STATE PROJECTS

In December 2006 the Proteus Fund hosted a meeting of funders to share experiences about the emerging group of state infrastructure projects. The group brainstormed a list of questions that needed to be addressed in order to advance the field and instruct funders. Those questions divided into five general areas:

1. How were these projects begun and designed? How big was the tent? Who was included and who was not? Who convened them? What was the original vision and goal?

2. How are they led, governed and managed? What makes them legitimate in the eyes of leaders and organizations in the state? To whom are they accountable?

3. How are they funded and sustained? What's the role of in-state donors? How is funding balanced between the new collaborative project and existing organizations?

4. What is the relationship between c-3 and c-4 organizations?

5. How can funders evaluate this work that is so long-term and expansive? What are the benchmarks and goals? How do funders know when their funding has succeeded?

Proteus undertook addressing these questions through a careful scan of various emerging collaborative state projects. There are numerous constructs, including national efforts by organizations like USAction and its state affiliates, various state coalitions, the Pushback Network, and the State Integration Pilot Project, among others. Each of these initiatives has engaged funders who support particular approaches, priorities and specific states. To come to a better understanding of how these projects are beginning to change the landscape, we identified criteria that reflect important common elements and then examined the strongest projects already underway in light of the criteria:

1. *Planning* that seeks to design a project based on long-term goals and objective new information, in short: intentionality. Planning means designing

an effort based on the particular circumstances, demographics and other patterns that are unique to each state; what's needed, what's missing, what are organizations capable of achieving – in contrast to continue to doing things the way they have always been done.

2. *Broad coordination* across issue, constituency and organizational lines, much of which takes place in "tables"– opportunities for partners in separate organizations to plan and learn together, including pre-existing collaborative efforts such as America Votes on the 501 (c)(4) side.

3. *Research* that shapes plans and activities according to demographic, geographic, public opinion and voter history measures. This helps to ensure that efforts are based on objective factors that go beyond the agendas of dominant organizations or preconceived, intuitive notions of strategy for advancing progressive values.

4. *Integration of key functions* such as communications and message, organizing/base building, non-partisan voter engagement, leadership development, policy development and research. In the past, collaborations would have strengths in one or more of these areas but were often missing pieces, laboring with weak operations, or else working in these areas but treating them as independent functions.

5. *A widely-held, explicit common vision* for broad in-state ownership of a collaborative, long-term strategy. Explicitly creating an overall common direction based on shared values helps connect diverse organizations so that the whole can be greater than the sum of the parts.

6. **Plans for sustainability**. While many such initiatives come and go, none can last without expanding the base of long-term funding support. These new projects should include creative ideas on how organizations can separately and in combination identify and enlist *new* resources of sufficient scale to match the scale envisioned by the long-term plans for infrastructure.

We examined projects in numerous states and concluded that the work in Maine, Minnesota, Michigan, New Mexico, North Carolina and Wisconsin best met the criteria. What follows is our best effort to look at the work in these six states in terms of the five questions that have been identified as important.

This paper in no way intends to be a definitive, comprehensive statement about the status of state infrastructure projects in the nation or even the status of the six particular projects that we focus on. Rather it seeks to illustrate how six state experiments are grappling with some common issues. These are snapshots designed to indicate how groups are moving toward working together in dramatically new ways.

It is understood that approaches to building infrastructure will vary from state to state and that plans may not address every function or integrate them in equal measure but the more comprehensively they do address them, the better. Infrastructure building goes beyond simply doing better what most organizations currently do or performing those functions at a larger scale. Thus, this concept of infrastructure transcends formal and informal relationships among organizations that work together tactically on specific campaigns even though these relationships are very important in forming deeper long-term alliances. These traditional modes of operation are important but have proven insufficient to achieving significant shifts in direction. The infrastructure-building approach that characterizes the work of the six projects demonstrates a fundamental shift in how traditional coalition efforts have operated.

1. GETTING STARTED
"The beginning is the most important part of the work." Plato

The genesis of each of the six state infrastructure development projects in Maine, Michigan, Minnesota, New Mexico, North Carolina, and Wisconsin is unique to each state, and influenced by a range of factors including:

- Leadership: the history of collaboration, criteria for inclusion, relationships among individual leaders, and the legitimacy of the conveners
- Vision: notions about governance, assessments of what needs to be built, different long and short term goals and vision
- State context: the size of each state, its political history, demographic factors, urban/rural splits
- Funding: the capacity and role of in-state funders, interest or lack of interest by national funders.

In the context of these many variables, *the two core components on which all of these successful projects have been built and maintained are the strength of relationships and trust among leaders who convene and lead these experiments, and the common visions they have built across their organizations, issues and constituency bases.* These different background factors directly lead to strategic differences among the projects when they began. What follows is a comparison of distinctive elements of their start-up strategies.

A. Small tent/big tent
As we compare the early organization of each of the six projects, we note an inherent trade-off between the agility, depth of commitment, and unity of purpose that comes with a small group on the one hand, and on the other, the

greater buy-in represented by a broadly representative but larger table with a more inclusive process that spreads decision-making more widely. Our discussions indicate that groups acknowledge this trade-off between efficiency and broader inclusion and some projects continue to make adjustments. Every project reached its own balance. Some gathered a small core of people with strong working relationships, others made decisions about inclusion based on which groups and leaders needed to be at the table in order to have credibility and reach key constituencies. Regardless of the size of the tent, *these six projects bring together new allies with a vision of strengthened shared capacities and greater collaboration than had been the case previously in their states.* While the goals and vision differed from state to state, every state project put forward explicit objectives toward a specific collective goal.

The Maine Civic Engagement Project, formerly Maine Blueprint, took the big tent approach. An initial group of leaders was recruited by the consultant organizing the process. That core group added additional Maine activists, creating an 11-member Steering Committee. Committee members led several work groups focused on particular elements of a long-term plan that involved nearly 100 people from 40 organizations, representing a broad cross-section of the state and its key communities that leaders believed were essential to achieving a statewide progressive powerhouse. Diverse c-3 and c-4 organizations participated in separate planning processes, including environmental, women's, low income, labor and good government interests. They planned together and communicated as allowed by law, and protected c-3 work and organizations with adequate c-4 funding paying for c-4 costs. Leaders of the project believe that including such a broad cross-section helped to build credibility. The strong history of coalitional work in the state was an asset, and broad participation was further facilitated by the fact that Maine is small with most of the population clustered in the southern part of the state. A year into the project the structure was somewhat modified to create an even larger tent and a larger c-3 table.

The projects in Michigan and Wisconsin also began with big 'tents.' Blueprint North Carolina, originally called the Aqueduct Project, started as a collaboration of Z. Smith Reynolds Foundation grantees that had a presence at the state legislature and were working on state level policy, so while the tent was large the project didn't include some key constituencies and issue organizations at its inception. Blueprint NC is now seeking to include additional strategic partners.

At the other end of the participation spectrum is New Mexico's Center for Civic Policy (CCP), originally the Pentagram Project, which has by far the smallest partner base with five core organizations. A sponsored project of the New Mexico Community Foundation, CCP is led by former political consultant Eli Lee and the former staff of his consulting firm, Soltari, Inc., who are now full time

employees of the Center. The small final number of participating groups, notwithstanding, CCP underwent a year-long selection process that involved a series of meetings with the five potential partners, including their boards of directors. This process was about developing strategy more than about decisions related to inclusion. An important question to explore is the degree to which there is a trade-off between the depth of commitment demonstrated by the New Mexico partners compared to a more perfunctory commitment by a much larger group of organizations in order to obtain breadth of participation.

Lee is the first to point out that the New Mexico approach is not a model for every state. He emphasizes that they are not trying to build a broad-based social movement but rather seek to fill an important c-3 niche in the division of labor around elections and policy advocacy. A smaller network of organizations that have a deep commitment to the project and can shift into campaign mode quickly has its advantages as well. The particular conditions in New Mexico that drive CCP's strategy are that the state is geographically large, has a small population that is majority minority, reasonably progressive elected officials, judiciary and governor, and a paucity of strong and well-organized advocacy groups.

B. Criteria for inclusion
More important than how many groups are included are the criteria for inclusion, who determines them, and their relationship to each project's long-term vision and goals. In other words, *decisions about whom to include derive from the purpose of the collaboration, its goals and vision.* Which groups should be included depends on each collaboration's goals.

For example, three criteria were used to choose partner organizations in New Mexico: groups with long-standing positive relationships with each other; leadership of each group had to have a movement-building perspective; and groups had to 'play well with others.' These criteria reflect CCP's core goal of building statewide voter engagement capacity and shaping the electoral battlefield, as well as developing new potential candidates and campaign staffers and so leaders selected groups with strong c-3 voter engagement skills and orientation. In addition they are using polling, micro-targeting and both paid and earned media to reach voters and potential voters. They are not primarily building a field operation because of their analysis that field operations, while proficient, are small, usually reaching less than 5% of the electorate. CCP wants to reach beyond the 'new and unlikely voter' paradigm, and aggressively educate and persuade likely voters with their policies, values and messages. Their point is that by moving beyond 'field' and reaching likely voters, the nonprofit sector will stop ceding the terrain of likely voters to the political parties, which has proven to be less than successful.

In contrast, the Wisconsin project, known during the planning process as Wisconsin Blueprint Project and now as The Network, started with a ten-year vision and broad power-building goals of which voter engagement was only one element. They sought to integrate organizing, voter engagement and advocacy, along with coordinated communications strategy and leadership development. The project began with a small planning group whose main criteria for participating leaders was that they be of a caliber and reputation that organizations around Wisconsin would see their involvement as a sign of the credibility of the project. Leaders were chosen more for individual gravitas and abilities as strategic thinkers than as representatives of particular organizations, in order to validate and ensure the excellence of the planning process and to support the goal of building statewide and long-term power. Subsequently the group was broadened to include a more diverse group of organizational representatives. Starting with a nonpartisan targeting[1] process conducted by Strategic Telemetry for the Milwaukee-based core project funder Brico Fund, the organizations were able to create a 'progressive index' to determine precisely which parts of the state should be organized and which capacities needed to be built.

In Wisconsin the criteria for new participants were pretty simple: groups had to have capacity. The invitation to join the planning was extended to organizations that were large enough in terms of budget, staff, and political expertise to already be on the political map. Nevertheless, given the density of organizations in the state, more than 125 organizational leaders were involved in planning. 501c-3 and c-4 organizations worked together to the extent allowed by law. Because there was a history of coalitional work, some important relationships and trust existed but participants admitted that as a result of the planning process they soon developed a level of collaboration and trust they had not formerly experienced.

While the Wisconsin planners tried to err on the side of inclusion, early on there were concerns about lack of representation from Milwaukee-based communities of color. This problem emerged in part from the planning process, which had included primarily leaders associated with larger, primarily state-level groups and in part because of a lack of strong working relationships across racial lines. Some of the core participants report that this problem was compounded by organizers' inadequate description of project goals which reduced the incentives for a wider diversity of groups to participate. Because the work was so

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[1] Nonpartisan targeting is used to replace guessing or intuition about where c-3 strategies should focus resources. Utilizing a wide range of demographic, economic, geographic, and civic engagement measures including trend projections, organizations can tell with precision where there are populations that will be receptive to its issues and values.

demanding and the process was on a tight schedule, communication with leaders and groups not intimately involved in the process suffered.

Subsequently, a Milwaukee-specific planning group and mapping project were subsequently created to achieve more inclusive participation around Milwaukee-specific plans and to connect those metropolitan goals to the state plan, both strengthening the plan and bringing new resources to a key area and important constituencies. The project conducted a "capacity mapping" survey of 44 Milwaukee organizations that primarily serve communities of color or women, outlining conclusions to guide Milwaukee work that include creating opportunities for organizations to relate and collaborate beyond customary boundaries; engage in advocacy and systems change; participate in long-range strategic planning; and develop and disperse leadership. Now a c-3 table has been created that promises to help engage the diverse and essential groups involved in local organizing efforts that will be supported by the state project.

C. History of collaboration
The history of collaboration in individual states was also a key factor in determining how these projects got started. Wisconsin had a long tradition of collaboration across boundaries of organization, constituency and issues, largely through Wisconsin Citizen Action, which has over 200 organizational affiliates and a significant labor base. But because the plan was to build an infrastructure to lift all progressive boats and not just the capacity of a single organization, leaders felt that while Citizen Action needed to be in the leadership mix, it was important that the new effort be located outside that organization, in more collectively-shared territory. That decision, along with the inclusion of a long-term plan for power and the use of data driven strategies, was key in attracting important power players as leaders in the project, including the Wisconsin Education Association Council**.**

In some ways it was New Mexico's complicated history of collaboration with some contentiousness between important players in the state that motivated leaders in the state to build their project with only five groups. In contrast, in North Carolina, when the Z. Smith Reynolds Foundation convened a number of its policy advocacy and organizing grantees to create the Aqueduct Project (later Blueprint North Carolina), many leaders developed working relationships for the first time. While there is a history of collaboration around democratic reforms, environmental protection, civil rights organizing and economic justice organizing, those efforts had not always included the same partners. Broader relationships needed to be built across issues, and existing relationships needed to be strengthened which took time and patience. Blueprint partners now include groups concerned with a wide range of progressive issues, including those mentioned above, as well as reproductive rights, immigrant rights, LGBT issues,

death penalty groups, education advocates, and others. While the hands-on collaboration now occurs around voter engagement and messaging, many leaders report that their organizational strategies have improved as a result of these cross-issue relationships – a terrific ancillary benefit of participation in the collaborative project. Notably, the North Carolina practice of convening meetings in different parts of the state has increased the participation of more diverse groups.

In contrast, Michigan, unlike North Carolina, already had an active c-4 coordinating table which influenced and led the development of the c-3 project. Michigan Voice evolved from the America Votes coalition coordination work in 2004. The majority of the coalition's participants were labor organizations and environmental groups including c-4 and PAC entities. The c-3 table emerged in part because participation of more diverse grassroots groups in a central convening table was identified as a priority, and many of those groups did not have a c-4. The table continued to grow after the 2004 elections with the deliberate intent of increasing the number of participating c-3 organizations. A strategic planning session in 2005 identified a need for organizing, advocacy and civic engagement tools for groups from the labor, choice, disability, civil rights, faith-based, youth, LGBT, environmental, women's rights and education communities in the state.

In Minnesota the strongest tradition of collaboration, which has also received the greatest funding, existed among environmental groups. The new c-3 project emerging in that state has grown out of the America Votes c-4 table and will seek new partners who share the groups' vision and goals but bring in a broader combination of constituencies. Organizers of the c-3 project are having deliberate conversations about who needs to be at the table. To accomplish this, they are looking beyond the usual suspects and would like to reach out to the Native American and recent immigrant communities even if it means building new organizing projects in these communities from scratch.

D. Project conveners and facilitators
Who convenes and facilitates the collaboration is a significant determinant of a project's legitimacy and credibility. The Aqueduct Project, precursor to Blueprint North Carolina, began with the stature and trustworthiness of the Z. Smith Reynolds Foundation. Participants acknowledge that some groups first participated because their core funder was the convener and they didn't want to be left out. ZSR did not push an agenda at these first meetings and as groups began to talk about building a collaborative effort they began to think about the capacity gaps that existed among those assembled. They realized that few of their organizations were led by people of color or had a base in communities of color (in a state where 32% of the population is minority, according to 2007 U.S.

census data), so they intentionally brought in new groups seeking to be more diverse. They also recruited groups that could strengthen the base of voter engagement activities. Funders also played an important convening role in Wisconsin and Maine, including hiring consultants to coordinate the project and pledging support for the outcome of the planning process. In New Mexico, funders played a key role – providing financial support to participating groups and publicly supporting the project in the state and nationally. In Minnesota significant c-4 money came into the state to build America Votes that helped bolster the convening table.

E. Key role for funders
As is clear from the descriptions above, funders played a central role in the infrastructure projects in all six states. In fact, funders were so important in creating confidence, reducing risk and creating the space needed to put these projects together, that similar new efforts should probably not be undertaken without secure core funding. Advocates did not feel that funders were inappropriately manipulative to offer funding to help groups plan to do things differently, particularly because the core funders in these states were very much part of the conversation and volunteered dozens of hours of their time. Funders might think more about how funding can function as an incentive to groups to work together at this deeper level.

In addition, ***advocates in all states emphasize the importance of ensuring that funding for new collaborations not be at the expense of continued core funding of participating organizations.*** Ultimately, if these projects are to be successful, funders need to make an explicit effort to make sure that new collaborative efforts do not jeopardize ongoing general support to participating groups. In North Carolina, Maine, New Mexico and Wisconsin funders played an early role as leaders of the convening. In North Carolina, a ZSR program officer staffed the early planning but quickly realized the staffing needed to be accountable to the leadership group rather than to the Foundation and she stepped out of the staffing role. While all six of these projects had engaged core partner funders the level of involvement varied from state to state.

2. LEADERSHIP, GOVERNANCE AND MANAGEMENT

Initiating and managing enhanced collaboration to build infrastructure among sophisticated organizations with established program priorities, accountability expectations, recognized leadership, and fundraising pressures is no simple matter, and there are no precedents from which to learn. Balancing the needs, expectations and aspirations of large state organizations with those of smaller under-resourced local organizations is part of the challenge. While governance

and management issues are certainly not inspirational catalysts for social justice collaborations, funders know from long experience that how well a project is governed, managed and led can determine how successful it will become. Funders and leaders also know that the best organizers are not necessarily the best managers.

Project members need to be clear on precisely how their organizations stand to gain by the collaboration – and as importantly, that the collective program, administration, and fundraising process will not in any way undermine their own organizations that they have worked hard to create and build and whose issues and constituencies are their first priority. These can be tough shoals to navigate in the context of existing tensions among organizations, questions of leadership, legitimacy, accountability, and understandable concern over simply re-dividing already scarce resources.

Advocates and funders alike understand that the purpose of these collaborations is ultimately to create a political space where numerous organizations can strengthen trust, develop long-term joint strategies and provide concrete benefits that allow all members to have more success, both individually and as a collective entity. This is a seismic change in planning how work at the state level can happen and involves more than just a larger vision. It must also involve a structure to implement this vision that is trusted by participants and doesn't further tax an already overburdened group of activists.

A. Leadership and legitimacy

As described above, the engaged participation of recognized leaders is the single most important factor in whether infrastructure development projects have legitimacy in the eyes of other leaders and organizations in the state. Those leaders bring legitimacy because they have a track record in the state, including strong relationships and a history of personal and professional integrity. Those leaders can include key funder partners as well, although relationships with funder leaders can be complicated if start-up funding is dependent on funder approval. Funder partners can play the most effective role if they set a high standard for funding and then step aside while leaders figure out how to meet the standard.

In North Carolina, ZSR played an early leadership role in convening the groups but left decisions about the nature of the collaboration to the organizations assembled. Subsequently those groups expanded the group to include non-ZSR grantees, which the Foundation supported. In Minnesota the major progressive leaders came together at the beginning, so there was a high level of credibility from the start. Furthermore, the convening leaders had significant experience working and carrying out relatively sophisticated voter engagement activities

together. The legitimacy of the c-3 table in Michigan was validated by the engagement of Ryan Friedrichs as project coordinator. His background, leadership and strong relationships with external organizations and funders confirmed the added value of the c-3 work.

B. Staffing
North Carolina, Maine, New Mexico, and Michigan all employ full-time project coordinators or directors to run the collaboration, whereas Wisconsin has shifted away from that model and now has a half-time consultant hired by the Brico Fund who is described as more of a facilitator and definitely not a director. Project management structure and leadership in Wisconsin are still evolving and project participants hope to eventually have in place a full time c-3 table coordinator. While the Minnesota project is still in its formative stage, two staff members have been hired: a table coordinator and a civic engagement coordinator who are housed at Wellstone Action. An overall coordinator will be hired at which time the table coordinator will become more of an assistant to this project coordinator.

If we think of these staffing patterns on a continuum, the Wisconsin collaboration clearly is on one end. Wisconsin participants have always emphasized that that their collaboration represents a strategy not an organization, a philosophy that explains why they have no director. The Wisconsin plan originally created five new staffing positions in the state – two organizers in western Wisconsin, two in Racine/Kenosha and a statewide Field Director. These staff positions were always embedded in key organizations participating in the collaborative, groups which have the administrative resources and capacity to supervise, support and sustain these positions. Originally, these staff members were centrally coordinated, but now staff members are responsible to the individual organizations.

Maine, Michigan, and North Carolina cluster in the middle of this continuum. They each have directors and program staff members who are housed at host organizations which serve as fiscal sponsors or administrative homes for grants, and share supervision of the staff. Relationships between staff and the host organizations vary among the three projects. In Michigan, a leadership committee from Michigan Voice supervises staff coordinator Ryan Friedrichs. By all reports this arrangement is working well. Maine Civic Engagement Project staff members are housed within host organizations but do not report directly to the host organizations or to their Boards of Directors, but rather to project director Ben Dudley who reports to the project steering committee. Blueprint North Carolina has been created as a strategic initiative – focused on creating collaborative change and not focused on a public identity beyond its partners. Thus, the founders looked for an administrative home for the effort, so that

Blueprint did not need to become a separate nonprofit. The North Carolina Justice Center, because of its scale and the close alignment of its interests and values with those of Blueprint, serves as this administrative organization. It employs Blueprint staff and receives grants made for Blueprint's work. The Justice Center manages grant funds and exercises oversight over budgets and compliance with grant terms. Justice Center staff members provide support for budgeting, bookkeeping, and grants management. Blueprint director Julie Mooney reports regularly to the Justice Center Executive Director. Staff oversight is carried out by the Blueprint steering committee, with the Justice Center Executive Director having a seat on the Steering Committee. There are some additional nuances within these three situations but the primary functional accountability rests within the leadership of the collaborative.

On the other end of the continuum, the Center for Civic Policy, while still a sponsored project of the New Mexico Community Foundation preparing to obtain its own c-3 status, functions as a distinct organization, led by a strong executive director. The Center provides the functions of think tank, communications, and leadership training. It coordinates these components working with its five partner organizations but the components and staffing of those components reside within the Center.

C. Governance structures
Not surprisingly, governance structures among the six c-3 projects reflect the staffing structure. Wisconsin uses more of a management team than a governance vehicle because with its decentralized structure, there's very little if anything to govern. In an effort to create a more fluid, organic structure 'owned' by a broader set of stakeholders, the coordinating infrastructure is now made up of Executive Directors from a set of key progressive organizations including the c-4 director. This group, known as the Network Committee meets on a monthly basis to review issues and further develop plans as project implementation progresses. This group includes individuals recognized by the Network as legitimate leaders within the collaboration and within their own organizations. They do the heavy lifting, make key strategy decisions, and have the big picture conversations. A c-3 Civic Engagement Director is being hired to coordinate the c-3 components of the project and will also sit on the Network Committee. The Network Committee also convenes a larger group of leaders of progressive organizations once or twice per year to help frame the agenda, celebrate success, and tackle new challenges. Network representatives emphasize that decisions are based upon research and the long-term plan that was created in 2006.

North Carolina, Maine, and Michigan have similar governance and management structures. North Carolina's work is guided by a nine-member steering committee that meets monthly to guide the work and make critical decisions.

Three other committees – communications, civic engagement, and participation – advance the programmatic work and advise the project on how to be more fully representative of the nonprofits in the state that share Blueprint goals. In Maine, an emerging 25-member Civic Engagement Project Table intends to meet six times per year to set overall priorities and project direction and, when necessary, to refine the ten-year master plan. A seven-member steering committee meets monthly; all major policy and fiduciary decisions are made there. Four other committees – communications and policy, civic engagement, fundraising and organizing – advance the programmatic work and advise the steering committee. The Michigan work, which is a sponsored project of the national Center for Civic Participation, is overseen by a leadership committee of five to seven members who supervise the coordinator. Michigan Voice organizations themselves meet monthly and work is carried out between meetings by six work groups: ballot initiatives, communications, issue agenda, polling/targeting, race and the movement and technology.

The New Mexico Center for Civic Policy, which is a strong staff-driven model, has a three person board for its c-3 organization and a three person board for its c-4 operation. One of the c-3 board members is from a partner organization and two of the c-4 members are from partner organizations. The others are chosen for what they bring as individual leaders of community and state organizations.

Representatives from Wisconsin, Maine, and North Carolina acknowledge the challenges that leaders who are managing and governing these new collaborations while already overburdened by the needs of their own organizations are facing. The stress is felt by both the individuals and by the member organizations. A leader in Maine has suggested offering the positive reinforcement of stipends of $2,500 - $3,000 to organizations whose representatives help manage the project. Eli Lee reports that because the five core organizations in New Mexico work closely together with joint planning and goals, the collaborative work has become part and parcel of each organization's strategy.

D. Accountability
Two other important issues related to governance and management of collaborative ventures are accountability among organizational partners and the tension between accountability related to one's individual organization as opposed to loyalty to the larger strategy. How do collaborative efforts hold organizations for delivering on agreed upon goals? Is it feasible to create structural accountability? *The overwhelming response is that at a very basic and important level accountability within collaboratives is about relationships. Accountability was described as being not so much to a larger entity as it to the*

group of people who work together. One state director admitted that some people were not at their table because they weren't trusted by the others.

The consistent observation across these states of the importance of strong and trusting working relationships helps to explain as well as heightens the challenge of building alliances among untraditional allies whose leaders have not worked together and often don't even know each other. Leaders from different organizational cultures and styles, including across race and class, need to build the trust necessary to build a winning majority. The challenge to these groups is to create trust-building mechanisms that operate in both directions, to create the relationships needed for these collaborative efforts to work. This challenge suggests funding for leadership development, training, shared resources that bring tangible benefits to all and campaigns that bring groups together rather than divide potential allies.

While it seems generally accepted that the effective leadership of collaboratives depends on strengthening relationships and trust among partners, tensions that already exist over scarce resources or turf don't necessarily disappear simply because groups come together to develop joint strategies. Because most of the groups participating in these collaborations come from an issue perspective, tension can exist around which issues are prioritized and which capacities are built. In this regard, Blueprint North Carolina participants found that a Demos Public Works Project workshop conducted by Patrick Bresette helped them to move away from an "us vs. them" perspective on issues. Having previously worked in a context of organizations fighting over a small piece of the budget pie, Bresette helped them to see Blueprint as a vehicle that frames the larger issue about the role of government as responsible for meeting the basic needs of people. That larger frame is becoming one of the foci of their joint work.

While the political frame has created a bond among the North Carolina groups, structural accountability is also a factor. Blueprint plans to have groups sign a memorandum of understanding stating that they will abide by the operating principles, including, among other things, participation on a Blueprint committee and support of major Blueprint gatherings and events. The MOU further specifies that Blueprint groups must not use any Blueprint tools and resources non-c-3-permissible purposes.

All the participating groups use voter files as a key ingredient of their work. Members of the collaboratives are considering ways of using the voter file to organize accountability. Because it is specific and easily tracked, the voter file work is a good tool for determining what participants have or haven't done in specific communities. It is also an ideal vehicle for structuring the fair exchange of benefits whereby participating state and local groups get training and access

to a high quality file which helps them in base-building, while the collaborative creates a powerful statewide civic engagement tool, which is described in more detail later in this report.

New Mexico's Center for Civic Policy has developed some creative internal metrics to measure what groups are accomplishing. For example, CCP has a long term goal of building a vote share of 155,000 socially responsible New Mexicans who are flagged in the voter file, in 23 of the state's 33 counties. After the election they can use voter file technology to measure turnout of flagged voters in relation to overall turnout to determine success.

E. Managing shared resources
One of the key ingredients in the success of these collaboratives is bringing new resources to participating groups that they couldn't afford individually – financial support, voter file, targeting data, polling, communications support and training opportunities, for example. Successfully managing shared access to these resources can go a long way in providing incentives for participation and loyalty to the collaborative overall.

In New Mexico, Michigan, Maine and North Carolina, most of these shared resources are housed with the collaborative staff while governance structures determine the process for sharing them. In Wisconsin's decentralized approach, however, they are dispersed; for example, the voter file is housed at Citizen Action and the new c-3 director position and ensuing training opportunities for c-3 organizations will be housed in the Institute for One Wisconsin, the state's new messaging center that was created by the collaboration. Management and distribution of these tangible resources must be coordinated and integrated into the shared ten-year plan. This requires that the organizations providing these resources be strong team players and that they practice a larger politics based upon a common shared vision which drives their work.

One of the fundamental fears of organizations creating a new coalitional form is whether it will cannibalize income that currently goes to the member organizations. Typically, the culture of organizational funding is scarcity-based, where donors and fundraising efforts are closely-held private assets to be jealously guarded rather than shared. ***The management of fundraising for these collaborative efforts, then, is critically important to the trust and cooperation that is being built.***

In Wisconsin, Network partners have begun to share some of the information about their donors with collaborating organizations. Partners have also begun to develop joint proposals due in great part to encouragement from the Brico and Beldon Funds. Creating a proposal that reflected the overall collaborative work

in Wisconsin was quite a chore this year because of the decentralized structure which has placed fundraising into the hands of the member organizations. It is a testament to the relationships among core development staff at Citizen Action, Wisconsin League of Conservation Voters, and the Institute for One Wisconsin that they were able to create a collaborative proposal.

The Z. Smith Reynolds Foundation has been very careful to provide new money to Blueprint North Carolina which has been immensely helpful in easing tensions. In the states with centralized fundraising structures – Maine, Michigan, Minnesota, New Mexico and North Carolina – staff members are acutely aware of this dynamic and so far have been able to deliver new money which has increased comfort with the collaborative.

F. Statewide organizations and community-based groups
One of the greatest challenges of integrating community efforts into state collaboratives is finding ways that these relationships can work to mutual advantage, bringing resources and state perspectives to community organizations while simultaneously making the concerns of low income communities and people of color central to state level efforts. While all acknowledge the importance of solving this challenge, figuring out how to do it has not been easy.

North Carolina is structured as a collaborative of state-level policy advocacy and organizing groups, but in its civic engagement work, it is intentional about linking these state-level organizations with local community-based groups. Among other tactics, they are using training and access to the voter file as the connective tissue. This helps to create more cross-racial alliances, since CBOs are more likely than state-level groups to be led by people of color. Blueprint North Carolina has not yet addressed the related governance questions regarding whether and how local CBO partners have a say in the overall direction of Blueprint, but that question has been articulated as one for the collaborative to address in the coming months.

In Michigan, a primary impetus for creating a c-3 table was the inclusion of smaller and more diverse community groups that were not part of the original America Votes c-4 table. New Mexico finds itself in a different environment being the nation's first majority minority state. Two of the Center for Civic Policy's partner organizations are grounded in communities of color and led by staff of color. The results of this partnership are encouraging. On the one hand, the primarily white groups in the mix have found that having diverse partners has helped them to be conscious of diversity in their own organizations and to develop skills to help them diversifying their staffs and boards. On the other

hand, SAGE, a Native American group has a low voting population, so it is learning from the larger statewide groups how to build its election capacity.

Despite Maine's status as one of the least diverse states in the nation, the Civic Engagement Project is partnering with the NAACP Portland branch, LULAC and leaders of Lewiston's Somali community to engage their members in Project activities. The Wisconsin experience in engaging and integrating smaller groups working in Milwaukee-based communities of color was referenced above.

G. Leaders' divided focus between collaboration and their own organizations
The experience of these six collaborative projects suggests that in spite of their best intentions, it is not realistic to ask leaders to take off their organizational hats when they come to a collaborative table, especially when money is involved. *It seems perhaps better for leaders to hold on to their organizational affiliations while they think realistically about what might be built together, capacities that groups on their own could not afford, that would help all groups to be more successful.* While there are different approaches to ensure accountability, participation in these larger efforts is related to a balance between trust among participants, the desire to win a new level of influence for groups with shared values, and the tangible benefits of collaboration – voter file, targeting data, polling, training opportunities, for example – that individual organizations could not afford on their own. This mix of approaches to governance and management and potential changes in these methods should prove instructive over time for other emerging collaborative experiments.

3. RESOURCES/FUNDING

A. Roles for funders
In addition to relationships of trust among leaders and a common articulated purpose, perhaps the most essential factor in determining the long-term success of emerging state collaborations is adequate new funding that does not cannibalize or threaten the existing core support of the partner organizations. Without significant new money, little is possible. Leaders of participating organizations will not be able to provide the bold leadership needed if their own organizations are undermined in the process.

Because these projects are intended to be long term, with policy, civic engagement and organizing outcomes based on significant planning and research, funding strategies must be more patient than is often the case with conventional funding that aims at shorter term outcomes. These projects develop organically and are unique, based on the characteristics and circumstances in each state, and so funding must be not only patient but also nimble, to meet

unique needs as they develop over time. Furthermore these projects require of funders a different approach to evaluation from usual assessments that rely on hard-edged, annual outcomes.

In most cases, projects have found donors who are patient, nimble, knowledgeable and committed to their particular state in the most likely places – within the state itself, among funders who focus on the region where the state is located or in national donors who have a commitment to a particular state or region. A concern expressed by both regional funders and the field (and described below) is with national funders who have a short-term interest in a particular state but who quickly move on when circumstances or events change. A related concern is the need for long-term c-4 funding that can partner with the c-3 donors for greater impact. That funding is even scarcer, and organizations compete for these donors' attention with every other political and election-focused outlet for their funding.

B. Importance of new money
New money is a requirement for success. Every state project emphasized the need to maintain the current capacities of participating organizations on which the new project relies. That is only possible if the new collaborative is funded with additional funds, not merely a modified apportioning of existing resources, although in fact, some portion of funds may shift as organizations shift their work in accordance with a collective plan. However, relying entirely on shifting money from existing capacity of participating organizations to fund the collaborative effort will serve only to weaken them and creates a strong disincentive for their participation. Two of the projects under review had to reduce the scope of their collaboration when funding they thought was in place didn't come through. One organization mentioned losing funding when a donor decided to shift support to the new state collaborative with the unintended consequence of undermining support for the collaboration within her organization. *These experiences suggest that bold collaborative state-based projects should not be undertaken without capable and committed funders who see themselves as long term partners.*

C. How the money flows and who gets it
Not only is new money needed, but funding will be much more effective if it can be more flexibly allocated than is possible with infrequent and rigid funding cycles. While no funder will or should give money in an open-ended and unaccountable way, mechanisms are needed to enable funding to parallel the projects' nimble development. One state-focused funder observed that the progressive philanthropy community has been talking about the importance of long-term and patient funding strategies for at least a decade. This conversation followed Sally Covington's report for the National Committee for Responsible

Philanthropy, outlining how 25 years of patient and long-term commitments by conservative foundations to the development of powerful ideas, core infrastructure and deep communications capacity fueled the rise of the conservative movement. This state-focused funder says she hasn't seen much action backing up the talk as progressive funders continue to focus on achieving short-term goals. The 2004-2005 Voter Engagement Evaluation Project (VEEP), a joint project of the Funders' Committee for Civic Engagement and the Proteus Fund, made similar recommendations: that long-term, year-round voter engagement funding is necessary to build the capacity for strong civic engagement.

Equally important is that funds or the resources that funding enables are distributed broadly so all partners benefit and organizations are not pitted against each other in competition for scarce resources. Examples of shared resources that have been built in these six state projects include a shared communications organization in Wisconsin, shared voter file projects in all the states, and collaborative polling and message development in New Mexico. Developing mechanisms so that resources and funding are distributed so everyone benefits needs to be a core aspect of any plan and should be built into Memoranda of Understanding from the beginning. Ideally, participating organizations should feel their involvement in the collaborative has expanded their resource base and power.

D. Importance of in-state funders
In-state donors are more likely than national donors to have a long-term commitment to a bold collaborative project in their own or neighboring states. In-state funders in North Carolina, Minnesota, New Mexico, and Wisconsin have played critical roles in providing early money for this work, frequently providing the largest percentage of income for these projects. In addition, they have provided consultants for planning and other needs, attended national meetings to promote the project in their state to other funders, and have helped grantees to develop relationships with national funders.

New Mexico's McCune Foundation and New Mexico Community Foundation played critical roles in convincing the California-based McKay Foundation to become involved in the state. Z. Smith Reynolds Foundation, the anchor funder of Blueprint North Carolina, has convened other in-state funders to interest them in supporting Blueprint.

In Wisconsin a team of three foundations provided the core support, anchored by Milwaukee-based Brico Fund. As the principal in-state donor, Brico provided and continues to provide essential core support and the direct participation of the Fund's director, with supporting roles for out-of-state Beldon Fund and

Proteus Fund. Brico's commitment included guidance, office space and other in-kind contributions as well as a willingness to pick up crucial but unanticipated costs. In addition, Brico played an important and respected governance role.

Although Maine does not have significant in-state donors, two out-of-state funders with a long-standing interest in Maine, the John M. Merck Fund and the Proteus Fund, were the anchor funders for the first year, providing nimble and flexible funding for the project's planning process and early implementation. In contrast, the Michigan project has two significant in-state donors who have been very supportive from the beginning. The project is working to develop long-term and sustained support from them for the infrastructure work and to build an in-state donor network with them at the core.

More than one in-state funder thought it would be constructive to have an ongoing dialogue among national, regional, and in-state funders to discuss how they could strategize together to support this work. Funders like the Brico Fund in Wisconsin and Z. Smith Reynolds Foundation in North Carolina seem quite willing to continue to be core funders for in-state infrastructure. But they would also like to be part of a national conversation about these projects, and have national and regional partners that are willing to participate for more than two to three years.

E. Organizing in-state donors
A core group of progressive individual major donors in Wisconsin is organizing a broader statewide network for increased common purpose and coordinated action as a donor community. The Donor Collaborative of Wisconsin has four objectives:

- To educate participants with impartial information to be more strategic, effective and focused on long-term impact

- To create ways to take action together, both through a pooled fund to make grants jointly to particular groups, candidates and causes, and/or through separate individual gifts that are better coordinated and informed by the knowledge of what other donors are doing with their own ideas, access and money

- To open access to and exchanges with national donors and national funder networks to augment their in-state impact with common information and shared funding strategies

- To explore their roles as wealthy individuals to make the best use of their wealth and influence in the service of deeply held values, including using their positions on boards and access to key leaders to better advance progressive values and the goal of effective and progressive philanthropy

The core donors building this circle have hired Larry Marx, a former Proteus program officer and the lead fundraiser for the initial seed money for the project, as a full-time coordinator . These donors have been consistent funders of the Wisconsin Network, and they view helping to support the continuation and growth of that project as one purpose of their organizing efforts.

Alternatively, in Minnesota, there are plans to hire a consultant to develop strategies to directly raise funds from in-state donors who will contribute c-3 and c-4 funds and to encourage multi-year funding. Last year Marie Zellar raised $780,000 from in-state individuals, working with lead donor Alida Messinger. To boost their efforts they are considering setting up an in-state donor council, soliciting two-year contributions to help build longer term stability, and raising both c-3 and c-4 contributions. This is a variation on the 2005-06 program in Wisconsin when a consultant was hired by the Proteus Fund to raise funds in-state, as well as nationally, to support the c-3 and c-4 needs of the project .

Maine Civic Engagement Project partners admit that organizing in-state donors has been difficult, in part because of the small number of in-state, year-round resident major donors in the state. But another problem is that like major donors in other states, most Maine donors tend to support work on specific issues, and in this case particularly focus on environmental protection. The rancorous collapse of Dirigo and the Maine Citizen Leadership Fund during the project planning process may have also put off some major donors. The Project's donor work was at first not well conceived or coordinated and then hampered by uncertainty about how to make the case. When the Maine project began, the principals focused more on new out-of-state money that they hoped would be substantial, rather than focusing expectations on raising substantial amounts of new in-state resources. When the project struggled to meet a challenge grant by an out-of-state donor which included an in-state matching requirement, there was tension among leaders who naturally worried about competition over finding the in-state contributions. Maine has since successfully met the John M. Merck Fund's match requirement and the project has won the support of several new key in-state donors. Maine leaders are turning the corner on meeting the challenge of raising in-state money, and the project's new executive director, Ben Dudley, brings badly needed fundraising experience. In addition, Maine Women's Lobby, Maine Center for Economic Policy, Maine People's Alliance, and the Natural Resources Council of Maine have begun to share information about donors and to collectively pitch donors for the collaborative.

A new network of individual donors loosely affiliated with the Democracy Alliance has formed the Committee on the States, staffed by Rob Stein, Frank Smith and led by others affiliated with the Democracy Alliance. They are exploring how to create progressive funder tables in six states. While this new

venture emerged during a Democracy Alliance gathering, is not a formal project of the Alliance.

F. An important role for national funders

In-state funders and practitioners are struggling to attract national funders through a variety of strategies. Some projects have applied directly to national foundations, building a case for why their particular state is important. Others are relying on their in-state funder partners to make connections with national donors through various donor networks and affinity groups. Still other projects are working to describe themselves so they comply with the funding criteria and guidelines of various national funders, seeking funding for one particular aspect of their work, such as voter file efforts. The Maine Civic Engagement Project has received funding from Veatch, for example, because of the strength of their community organizing.

The state leaders and in-state funders we interviewed believe that most national funders are attracted to particular states because of a calculus related to national elections and swing states, and that funding continues to be tied to those short-term civic engagement goals and boom-and-bust cycles. In the face of the 2008 presidential election cycle, one organizer in a Presidential swing state bemoaned the large amounts of money that typically arrive late in election years, the pressure to turn around production of large numbers immediately, and the dearth of money in off years, during the ideal time to built capacity to increase voter turnout. Another organizer in a swing state with little in-state money said "We'll never change the funding cycle so we have to learn how to use it to our advantage. We're banking on our being a swing state and will try to pull in national money. I don't mind the ups and downs so much if I know when the money is coming and how it's going to come."

Ideally, these state infrastructure projects would prove to be of such significance that national funders would understand the need to make long-term commitments beyond specific election cycles. ***In order to increase national funder involvement in these projects, there needs to be greater understanding of their ambitious vision, the goals and capacities they are attempting to build, their connection to shorter-term objectives, and perhaps more importantly, a shared belief that building capacity of in-state organizations over time will yield more results than episodic funding.*** It is possible that with adequate support, a handful of star projects, with a high bar for performance and specific criteria linked to success, like the six we are looking at here, could demonstrate significant accomplishments. In that case, funders could start to ask different questions and allocate their funding with a longer time horizon and more understanding of how building long-term capacity pays off.

Another category of national funders with an interest in states are issue-specific funders. The Beldon Fund is a stellar example of how an issue funder, in this case focused on the environment, can support state-based projects to build general civic engagement capacity, in order to be able to win environmental victories down the line.

G. A role for pooled funds

While there is broad recognition of the need for funding to be nimble, flexible and readily available, there have been few experiments to try to make this happen. The challenge of overcoming silos between different organizational and issue boundaries is perhaps only superseded by the challenge of overcoming silos in the funding community. One possible model is a pooled fund which allocates funding based on potential grantees meeting strict criteria, complying with a written plan for achieving agreed-upon goals. In 2006 the Proteus Fund and the Proteus Action League created two pooled funds for Wisconsin, one c-3 and the other c-4.[2] State leaders say that several important components of the project's start-up would not have been completed without access to this pooled fund. It helped to fill in gaps in the plan left by other contributions that were earmarked for particular organizations and projects. Proteus could respond relatively quickly to collective project needs rather than being tied to a rigid grantmaking cycle. Proposal writing, reporting and accountability structures were simplified to give project leaders more time to focus on the work, and the pooled fund supported important activities that did not neatly fit the guidelines of other foundations who also supported their work. A pooled fund for a specific state enables a level of donor education and organizing that helps to create understanding. In Wisconsin, this helped pave the way for the new state Donor Collaborative. Proteus also housed c-3 and c-4 pooled funds for Maine through which $354,000 was contributed and $225,000 awarded in c-3 funds and $20,000 contributed and $19,000 disbursed in c-4 funds between 2005 and 2007 to support the collaborative project.

Proteus' experience with these two funding experiments indicates advantages of a pooled fund with an institutional capacity to be nimble, responsive, and move money relatively quickly. It should be noted that the funds for Wisconsin and Maine were not collaborative in the sense that donors did not meet and decide how to distribute the money. Donors agreed to the states' plans and goals and

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[2] The c-4 was called the Wisconsin Forward Fund and was housed at the Proteus Action League, a c-4 grantmaking entity affiliated with the Proteus Fund. Not counting the other anchor funders of the project (the Brico and Beldon Funds), 17 other individuals, six other foundations and three labor unions contributed a total of $1,053,000 in c-3 and c-4 funds to the project in its first year as a result of Proteus donor organizing: $477,000 to the c-3 fund, $140,000 to the c-4 fund, $215,000 in earmarked contributions made directly to specific groups for specific projects, and $221,000 in other contributions. Both funds were staffed by Larry Marx.

understood that their funds would support those plans and would be monitored by Proteus program officers. Recommendations were made to the Proteus board based on the priorities of the plan, the groups' reaching specific benchmarks and the recommendation of the in-state Steering Committee. The purpose was to fund activities that supported the plans that state advocates had created and to move money to areas of immediate priority, leaving later funding needs for funders who needed more time or wanted to fund more directly. The pooled funds provided funding for the gaps, when there was an urgent need and no other donor available to meet the need or timing, sometimes supporting the infrastructure 'around the edges' that issue funders with more restrictions, couldn't support. Proteus, other funders of the projects in Wisconsin and Maine, and the state projects themselves understood that some funders would want to fund specific pieces like the message hub or voter file. Proteus staff worked closely with representatives of the Wisconsin and Maine projects to identify upcoming needs that had not been funded and proposals were submitted for those pieces based on the general infrastructure development plan that had already been vetted. Generally Proteus was able to make grants within two weeks of receiving requests.

H. A national pooled/collaborative fund
Although at this point there is no national funder pool or collaborative fund open to all qualifying state projects to support this work, the advocates who we interviewed voiced great support for creating one. They expressed a strong sense that a repository for national money would be extremely beneficial. It is a goal of the Proteus Fund to create such a fund through the State Strategies Fund. Such a fund could set aside part of the money to be more responsive and agile than some foundation docket schedules and grantmaking process would allow as the Proteus experience referenced above indicates. One consultant to a foundation that is currently funding infrastructure work went so far as to say that "State infrastructure work is crucial but it won't happen without a national pool of money. Needs in this field are great and unpredictable at times. Agility is needed." Some also thought that large national funders might want a firewall that an intermediary could offer.

One state project director, when asked what is needed to fund this work adequately, said "a national pooled fund would be a dream." He also urged funders to consider having a generic proposal form. Citing the amount of time spent on writing different proposals, he said that a generic proposal format would be "immensely helpful." Perhaps conversations among funders and between funders and advocates should be pursued to determine whether it is feasible to explore this further.

Scott Nielsen, consultant to the McKay Foundation which currently supports infrastructure development in New Mexico and California, cited the money and politics work in the early 90's as the gold standard for how moving resources for state capacity could work. Infrastructure was built in the field and funders were organized informally around a common strategy. Originally the money was granted directly, before the Piper Fund was established as a pooled fund for state money and politics work. Each funder underwrote the pieces(s) of the infrastructure he or she could, given a particular foundation's issue orientation. For example, Schumann, Joyce, Carnegie, Proteus and OSI funded advocacy and state work; Pew paid for the academic research and legal work; Benton did media. In this manner all of the main pillar groups and functions were adequately funded. Essentially a grantee/funder infrastructure was created within a shared strategy where needs were discussed and met with collective responsibility among funders.

I. Other emerging funder strategies
Donors are also being creative in finding ways to help the state projects. The Citizen Engagement Fund hopes to provide opportunities for "bulk purchasing," for example, of subscription-based access to a database of voting-age Americans from Catalist and from the Voter Activation Network, a set of online data management tools that help maximize use of voter file data. It might offer circuit riding technical assistance to newly emerging efforts.

J. Attracting political donors to support c-3 infrastructure
Individual political donors could be an ideal source of funding to help move these projects to scale. Typically, these donors are not predisposed to support nonpartisan causes and so recruiting them will require a carefully constructed development strategy. Partisan donors see the c-3 side as 'soft', disorganized, obsessed with process, working in issue silos, and unable to measure results, mirroring the negative stereotype held by some c-3 leaders that pegs partisans as elite, top down, and undemocratic. A political consultant told us that individual political donors don't understand capacity building. On the bright side, there appears to be a growing recognition among individual donors that investments in c-3 organizations are needed if there is to be an organized constituency to hold elected officials accountable. It seems that several of the Democracy Alliance donors have gained this understanding through their experiences in the 2004 and 2006 elections.

K. Role of c-4 money
While there is a need to attract some political donors to the c-3 side, particularly during off-years, there is an even greater need to find funders for the c-4 side of the state collaborative work. Proteus' experience has been that c-4 organizations play an immensely important role in building state infrastructure as they are permitted to engage in a broader range of activities (such as unlimited lobbying) than are c-3 organizations, provided that their primary focus is promoting the 'social welfare.' While c-3 organizations can talk about issues, c-4 organizations can talk about candidates as well. Even if c-4 organizations receive contributions from unions and corporations, they can still engage in partisan communications with their membership. Furthermore, in an infrastructure planning process, generous c-4 resources can enable a bolder plan than c-3 funds only will permit.

4. C-3/C-4 LEGAL ISSUES

While the six state collaborations under consideration are §501(c)(3) operations, they all understand that c-3 organizations working alone are limited, and cannot by themselves wield the power necessary to consistently win a policy agenda for their constituents. While they can mobilize voters, all their activities must be strictly and unequivocally nonpartisan. Other entities and non-deductible funding are also required. In each of the six states under consideration the c-3 projects are part of an evolving scene of different configurations of organizations, operating with a high regard for and basic understanding of complex legal restrictions, with appropriate separation, and in some circumstances, also with a level of coordination, as allowed by law. But while these groups have the basics down, there are always developments and new opportunities that create complexity and sometimes uncertainty. Ongoing legal advice is needed because the legal questions that arise from the field have specific circumstances, in many cases unique to each state.

It is important that each state collaborative effort has its own sophisticated and up-to-date understanding of legal restrictions, and that more resources are targeted to support the development and dissemination of accurate knowledge. If grantees are uncertain about the laws they are more likely to do less rather than more. These collaborative efforts are not only governed by federal tax and elections laws, but also by state election and lobbying laws which differ greatly from state to state and dictate how different entities may and may not coordinate

and communicate. Often leaders understand the laws to be more restrictive than they actually are and thus their different organizations do not communicate and plan together as much as they can under the law. But a bigger problem than organizations being too cautious is the possible risk to the organizations' future by being too cavalier, either knowingly or more likely unknowingly, about the law. There is no short-cut, we feel, to each state having access to knowledgeable in-state legal counsel that is committed to the work of these collaborations; and funders should take legal needs into account in their funding strategies.

One new capacity that Proteus would like to help create is a national network of in-state attorneys who share interpretations of federal tax law, keep each other abreast of new developments, create stronger training programs, develop and share different approaches to particular state election and lobbying regulations and call on each other for assistance. Such a national network would build a repository of legal know-how, saving groups money and helping attorneys to feel more confident in thinking about what is possible rather than what is not.

The groups we interviewed shared legal advice they had received with other groups in their states and their collaborations, and some shared memos obtained from attorneys specializing in the field of non-profit law. The very good news is that *all the groups are receiving similar advice about the more general questions of c-3 and c-4 coordination, but several c-3 organizations are uncertain about the parameters of allowable communication with non-c-3 groups.*

And, it isn't always legal uncertainty that makes it hard for different legal entities to communicate. There are also differences in organizational culture, scale of resources, perceived outcomes and expectations that figure in how or whether c-3 and c-4 organizations work together. Some funders exacerbate groups' heightened concern about legal restrictions because of their own legal advice and the fact that private foundations have more restrictions than their publicly supported grantees. Some foundations set up unnecessary restrictions on their grants, such as forbidding lobbying, causing further unnecessary hesitation in the part of grantees to participate in allowable activities. All six projects had some story to tell about c-3 organizations hesitant to engage in voter registration or mobilization strategies for fear of being tainted as partisan or of jeopardizing their tax status or their funding.

The creation of America Votes[3] has transformed the c-3/c-4 constructs in several of the states where it is active. In 2004, America Votes had programs in 13 states, including all of the states we are focused on except North Carolina. In 2006 they reduced the states in which they were active to nine; Maine was among the states which were dropped. They have not yet finalized their 2008 states but plan to stay in Michigan, Minnesota, New Mexico and Wisconsin and are considering going into North Carolina. America Votes has attempted to build capacities in states working with in-state groups and building onto existing state resources and capabilities with more success in some states than in others.

Catalist[4], formerly Data Warehouse, promises to have an equally transformative impact on this work. Catalist offers progressive organizations a comprehensive national database of voting-age individuals in the United States, along with the tools and expertise needed to use this data to communicate and campaign more effectively and is committed to making it accessible to organizations. Having an accurate voter file could dramatically strengthen c-3 civic engagement work, increasing impact in mobilizing voters and shaping the electoral arena. But that won't happen without careful attention to developing programs in each state that are designed to meet the needs and expand the strengths of groups on the ground. Catalist's goal is to have a complete national voter file by the end of summer 2007. There have been problems in some states, like Maine, where the 2006 list was inadequate. Some c-3 and c-4 groups in other states have chosen different list providers for reasons related to unique circumstances in their states.

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[3] America Votes is a coalition of 37 of the largest membership-based groups in the country, who have come together to increase voter registration, education and participation in electoral politics. Their partnership represents a combined membership of more than 20 million Americans in every state in the country. Groups that are part of America Votes work on a broad range of issues including the environment, civil and human rights, choice, education and labor. Participating groups include: 21st Century Democrats, ACORN, AFL-CIO, AFSCME, Alliance for Retired Americans, American Federation of Teachers, American Association for Justice, Americans United for Change, Ballot Initiative Strategy Center, Brady Campaign to Prevent Gun Violence united with the Million Mom March, Campaign for America's Future, Change to Win, Clean Water Action, Defenders of Wildlife Action Fund, Democracy for America, EMILY's List, The Human Rights Campaign, League of Conservation Voters, League of Young Voters, LULAC, MoveOn.org Political Action, My Rural America, NAACP National Voter Fund, NARAL Pro-Choice America, NDN, National Education Association, National Jewish Democratic Council, People for the American Way, Planned Parenthood Action Fund, Progressive Majority, ProgressNow Action, SEIU, Sierra Club, USAction, Voices for Working Families, Women's Campaign Forum, Women's Voices. Women Vote., Working America, Young Democrats of America

[4] Catalist (formerly known as Data Warehouse, LLC) combines standard demographic and high-quality political information with commercial data, which enhances opportunities to focus messages, ideas and requests to either large groups or targeted individuals. They also offer the software tools and in-house expertise to help use this data effectively.

Each of the six projects we are examining has a unique arrangement of c-3 and c-4 organizations, as a consequence of different circumstances and history, including whether America Votes is working in their state, whether their state is a battleground for ideas, and the nature of project leadership, among other factors. Blueprint North Carolina is the only state project that does not have an affiliated c-4 organization. Four have long histories of closely related c-3 and c-4 entities and a history of accomplishments. All six of these state endeavors have c-3 voter file projects at different stages of development and sophistication.

Maine:
The capacity building project in Maine has both c-3 (Civic Engagement Project) and c-4 (Blueprint Project) components. Both aspects have a 'table' of interested parties. 40 groups in all are participating in some fashion in the project.

The Civic Engagement Project has a steering committee made up of 13 experienced organizational leaders. The Maine Blueprint table has its own steering committee made up of 12 political organizers and leaders. The two steering committees share 5 members, each of whom serve on both the c-3 and c-4 committees. This ensures an appropriate amount of overlap to facilitate appropriate collaborative planning and implementation.

The steering committees function like the executive committee of a board of directors, providing fiduciary oversight and making decisions between meetings of the larger table.

Minnesota:
Minnesota is a priority state for America Votes which convenes the c-4 table. In 2004, Road Map, the original pre-America Votes in-state entity, was responsible for c-4 coordination but that task was turned over to the America Votes-Minnesota table that was organized after the elections. Road Map is now a long-term framework within which both c-3 and c-4 groups engage in strategy development. Minnesota has the best of both worlds with c-4 resources coming into the state from America Votes, but controlled by in-state leaders who hold all the staffing positions. At the same time, the c-4 table is linked to a national organization and the America Votes network provides an important national tie.

The primary c-3 voter work in the 2006 elections was performed by Minnesota Participation Project, a civic engagement table with over 300 organizations sponsored by the Minnesota Council of Nonprofits. They work specifically to get service-oriented nonprofit organizations involved in nonpartisan voter registration and voter turnout work, particularly in low income communities of

color. The newly emerging Civic Engagement Project will be much more advocacy-oriented but will work with MPP to move more c-3s into advocacy.

The decision maker on the c-4 side is the America Votes Executive Work Group which is staffed by AV-MN State Director Josh Syrjamaki. The Executive Work Group reports on their activities to the larger AV table. Members of the working group include Wellstone Action, Clean Water, Take Action Minnesota, SEIU, Education MN, AFSCME, and Planned Parenthood, with Robert Richman as a consultant paid for by the leading in-state individual donor. The organizations that participate in the Work Group are clearly the "power" players on the progressive electoral side. All say that others at the AV table would be welcomed to the Work Group if they wanted to join, although it might be seen as a bit awkward if someone not seen as a power player wanted to join. Leaders Marie Zellar and Robert Richman say there is no tension related to groups not being involved in the Work Group or at the America Votes table.

Michigan:
Michigan has been a core America Votes state since 2004, and AV coordinates the c-4 table. Michigan has two c-3 coordinating tables. Michigan Voice is the 'activist table' and is comprised of organizations with full voter contact programs. The other is the Michigan Participation Project, coordinated by the Michigan Non-Profit Association, which develops voter engagement resource materials for service providers such as food banks and health centers. These three collective tables alternate meetings between Detroit and Lansing in order to increase participation of more diverse groups. The c-3 tables meet first, followed by the c-4 group.

These collective tables have organized legal trainings for coalition partners in order to encourage c-3s to carry out more advocacy work. A skilled Michigan attorney works with the various tables to provide legal support, and the projects are exploring a relationship with the Alliance for Justice to provide ongoing legal training and they have a goal of hiring a staff attorney.

In 2006 Michigan Voice was one of the first pilot partners of Catalist/Data Warehouse, which created its central voter file. 34 groups out of 50 of the membership organizations signed up to use the voter file. While the list is leased from Catalist, the organizations own any updates that they make to the list.

The central voter file was a key element in the coordination of the collaborative in 2006. They also piloted an online c-3 mapping and voter file interface. The phone lists, walk lists and mailing lists were all managed internally by Peter Davis, the central technical staff person, who is employed by Michigan Voice in the state to service the partner's needs in this area. The c-4 list management was

facilitated solely by America Votes. Initially many of the smaller c-3 groups were not sure how to use the voter file; the training and assistance provided by the central technical staff was invaluable.

New Mexico:
The Center for Civic Policy is a sponsored project of the New Mexico Community Foundation and is seeking its own c-3 tax status. It has a c-4 sister organization, the Center for Civic Action. In addition, New Mexico is an America Votes state.

CCP began by using a statewide voter file built by its Technology Director, who had been building voter files for six years. CCP trained three of the five partner groups on voter file management, and now, each are manipulating their own voter files, matched to their organizational databases. Through Michigan Voice's current contract, CCP now has access to Catalist and the Q tool as part of the State Integration Pilot Project. For 2008-09, CCP, along with three of the other states in the Pilot Project, are negotiating to have Catalist data, the VAN interface and a technical assistance staffer through CEF.

CCP is in the middle of a modeling and micro-targeting project with pollster Steve Clermont and modelers Ben Yuhas and Robin Pressman. This project is developing a model, or score, for socially responsible and environmental voters in New Mexico.

North Carolina:
North Carolina is not an America Votes state and is the only one of the six states in this overview that does not have an organized c-4 in-state table. However, a group of Blueprint and other organizations that have c-4s have been meeting regularly to share ideas and strategies. There are strong c-4 organizations in the state that are not affiliated with Blueprint. This work is not coordinated with Blueprint, and it is not yet staffed. There is interest in raising funds to have a paid coordinator of this table, and it is expected that this will happen over time. At the same time, an incipient voter file project is developing.

Wisconsin:
In Wisconsin America Votes plays an important role of connecting and facilitating c-4 plans but does not run its own operation. AV also pays the salary for the c-4 activities of the voter file coordinator housed at Citizen Action of Wisconsin. In an off-election year about 70% of the voter file costs are c-3 expenses while in years of major elections, the percentage is reduced to 60%. The Network does not run its own voter operation although they do conduct voter file, media, and internet civic engagement work. Each organization runs its own

voter program with the help of AV's facilitation. The new c-3 table that has been established will perform the same function for c-3 voter engagement activities.

The Wisconsin file provides access to approximately 3.8 million records of voters and voter history in the state. Each participating organization can get a complete match of membership, activist, volunteer, donor or ID lists to the voter file. This includes updated contact information as well as voter history dating back to 1992 as well as geographic information, such as what ward or legislative districts members live in. Participants are also afforded unlimited access to all issues IDs, and models available on the file. Currently there are just shy of 593,000 issue IDs on the file. To date, significant funding has been invested in this civic engagement file infrastructure and current priorities are now to deepen and broaden its use through file enhancement and organizing programming.

The file is accessed through the VAN (Voter Activation Network), which allows an organization to search the voter file, get counts and cut lists. It also is a database to store ID information, contact information and track contacts with voters/members. In 2009 if Catalist has a fully usable voter file for Wisconsin, then Citizen Action of Wisconsin will no longer need to host a separate file. In the event that Catalist is unable to create a file for Wisconsin that has all historical and other pertinent data, for $25,000 the network can purchase all data from PPC, their current vendor.

5. EVALUATION

Question: *What have conservative foundations found to be successful strategies in funding public policy advocacy? Could you start with a listing of those strategies?*

Answer: *Here is a list: cultivation of ideas that are fundamentally new ways of thinking about public policy and that defy the orthodoxy of the moment, funding over the long-term, funding through general operating support, funding in the face of possible or even likely criticism, funding in the face of likely setbacks, and staying with it over the long haul, realizing that significant change takes time, and* ***a willingness to think about evaluation only in the most expansive way rather than in some narrow methodological, numerical fashion.***

<div style="text-align: right">

William Schambra
Director, Bradley Center for Philanthropy and Civic Renewal
(Alliance for Justice Interview)

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Program evaluation continues to be one of the most challenging and sensitive aspects of the process of making grants to these collaborative and dynamic projects as they work to achieve long-term capacity goals and win short term victories in a fluid and unpredictable environment. Private foundations and

evaluators have been successful with a traditional approach to evaluating direct service delivery and annual program goals in terms of activities accomplished; but evaluating dynamic and complex activities such as organizing, policy advocacy, voter engagement and capacity building have been more elusive, requiring a different evaluation mindset and approach. Strategies to win policy, for instance, typically evolve over time and unforeseen events can cause planned activities to shift quickly. It is particularly difficult to nail down evaluation of projects that seek to build capacity and integrate organizing, voting and voter engagement, beyond the metrics of registration and turnout. Evaluating organizing and advocacy requires assessing processes that are nimble and often unpredictable and circumstances where being able to take advantage of unanticipated opportunities may require changing the plan.

Those in the field frequently live in fear of evaluation because it connotes judgment and potentially failure and frequently focuses a short-term lens on long term work. Grantees often feel they have no control or influence on how they will be evaluated and rightfully express fear about an evaluation process that brings their work to a standstill. And the collaborative element adds another layer of complexity. Edward Pauly, Director of Evaluation for the Wallace Foundation says that because the word "evaluation" is a technical word that sounds foreign and creates discomfort, and suggests not using it. He prefers the term "learning" because it's something all of us do and isn't the sole property of evaluators. Funders should keep in mind that evaluation is loaded with potential for miscommunications. However, if it is handled with mutual respect it can produce stronger bonds with grantees.

A. Encouraging trends
Over the last 12-18 months, there has been a growing interest in evaluation of advocacy, and *The Evaluation Exchange,* published by the Harvard Graduate School of Education, focused its spring 2007 issue on the topic. The report notes there is a growing understanding that evaluations should be *useful* not only to grantmakers but also to the field. Increasingly evaluations are designed to benefit the group being evaluated. It is also encouraging that both grantmakers and leaders in the field believe that evaluation can and should be a tool that helps grantees to build capacity. While these six projects all recognize the need for short-term quantitative evaluation of aspects of voter engagement work, for example, they also understand the need for different criteria to evaluate the longer term aspects of their work. A leader in the Wisconsin project said that in evaluating "we need to see if we are building capacity on the ground" and that the collaborative shows "effective use of resources and takes advantage of technologies." Representatives from Maine offered that the most important evaluation criteria include: whether they are creating significant partnerships, have strengthened existing work in important ways, and are executing new work

well. But we are not very knowledgeable about how to evaluate the success in creating new strategic partnerships based on trusting relationships.

One funder suggested that in five to seven years her foundation will probably be looking for policy changes but in the meantime feedback on the benefits of the collaborative effort, an increase in the number of groups engaging voters, broadened membership for participating organizations are the type of measures she will be looking for.

B. New Mexico's evaluation of efforts to shape the electoral battlefield

The New Mexico Center for Civic Policy has identified metrics for measuring the success of four objectives that have both long-term and annual outcomes. This is important since they are operating in a civic engagement arena with a goal of shaping the election battlefield and where other partisan efforts are looking for very hard edged outcomes in terms of winning elections. Their four goals and their respective evaluation metrics are:

1. Build a vote share of socially responsible New Mexicans flagged in the voter file in 23 counties, evaluated by post-election polling and voter file analysis.
2. Create a socially responsible issue environment and support for four strategic initiatives, evaluated by an annual benchmark poll and randomized test of small media markets over multiple years to measure impact of radio ads.
3. Leadership development, evaluated by number of leaders trained to run for office, staff non-profit organizations and other leadership positions.
4. Build capacity through shared services, technical assistance to partner groups, communications, coordination and organizational development, evaluated by greater movement capacity, including increased depth of partner groups who help each other, more effective volunteers, more efficient voter mobilization.

C. Participatory evaluation

One of the negative connotations of the concept of evaluation is that it's something that is done to people, without their input. Another is that it is not helpful to advancing their work or to their learning. Blueprint North Carolina leaders would like to develop a participatory evaluation process through which they are active participants with evaluators and funders in helping to shape the process. In a participatory evaluation process the project and activists being evaluated play an active role, and the evaluation is part of a learning process that helps those being evaluated to reach goals. Participatory research is an element of the larger field of 'action and community based research,' a process led by activists that includes planning, action and evaluating the action in order to learn

and improve. [5] ZSR and Blueprint staff members are also highly interested in quantitative measures and would likely want to see a blend of both approaches.

Whether funders are interested in using evaluation for assessment, as a learning tool or to build capacity, a participatory process can be extremely useful. Participatory strategies are varied with a range of levels of participation and outcomes. Three key principles that guide the design of participatory evaluations, and perhaps should guide all evaluation, are:

1. Do no harm

2. Make sure the evaluation is useful and used

3. Design evaluation to help improve performance and meet goals

D. Lessons for evaluating advocacy efforts
While the field of advocacy evaluation may be relatively new, there are numerous lessons emerging that can be immensely helpful in shaping evaluations:

- The need for flexibility instead of a lockstep approach to evaluating a previous plan when unexpected events take place in the political environment

- Capacity building should be a key outcome measure

- Evaluations need to be matched to the scale of the grantees' resources which includes staff time

- Groups should build evaluation into their budgets in order to demonstrate that the work is paying off

- There are important outcomes short of actually winning a specific policy such as influencing the debate, increasing media exposure to the issue, creating new leaders, etc.

- The performance of nonprofit networks cannot be evaluated using the same framework traditionally used to evaluate individual organizations e.g., don't try to isolate a particular partner's contribution within a coalition. Look instead at the aggregate

- Foundations and grantees should work together on designing evaluations

- Design evaluations that grantees actually want to do and to use

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[5] For more on participatory evaluations, see *Evaluation: Good News for Funders* by Andrew Mott. Also see Yolanda Wadsworth's, What is Participatory Action Research?, in the refereed on-line journal, Action Research International, Paper two.

- Design evaluations that help improve performance

- Clarify what you want to achieve before creating the evaluation design

- At least part of an evaluation should be participatory

- The things that are easiest to count may not be the most important

- Be more concerned about learning than judging

- If you want candor and collaboration, don't link the evaluation to an immediate funding decision and communicate this to the grantee

- It's important to remember there is a major power imbalance between funder and grantee

E. Evaluation resources for funders

The emerging interest among foundations and evaluators in advancing the field of advocacy evaluation in ways that are supportive of the needs of the field as well as the needs of the funders is quite promising. A new literature is developing that offers promising insights into funding policy advocacy. The Evaluation Exchange, referenced above, hopes to address issues related to community organizing and participatory democracy in future issues. The Alliance for Justice, through its Foundation Advocacy initiative, has invested heavily in working with foundations to advance this field. In 2002 when the Alliance for Justice and the Rosenberg Foundation began a project to prepare funders with a practical way to evaluate advocacy, they found little relevant research or methodology. As a result, their 2005 publication *Build Your Advocacy Grantmaking: Advocacy Capacity Assessment and Evaluation Tools* became the first guide of its kind for nonprofit advocacy.

Following is a partial list of tools to help with evaluation:

- There is an online edition of *The Evaluation Exchange*, previously mentioned that can be found at: http://www.gse.harvard.edu/hfrp/eval.html

- *Continuous Progress* is an online collection of tools for better advocacy through evaluation (www.continuousprogress.org). The website features practical steps to help advocates, grantmakers and consultants plan and evaluate advocacy efforts in a collaborative manner.

- The Annie E. Casey Foundation commissioned Organizational Research Services (ORS), a Seattle-based evaluation consulting firm to create a guide that would help both the Casey Foundation and other organizations to better define and document the effectiveness of their advocacy and policy strategies. That guide is entitled *A Guide to Measuring Advocacy and Policy.* It is available

on the Anne E. Casey website (www.ecf.org) and the ORS website www.organizationalresearch.com

- Grantmakers for Effective Organizations, an affinity group of the Council on Foundations, works to promote learning and dialogue about the effectiveness of nonprofit organizations; the wide range of strategies for accomplishing organization-building; and the constructive and catalytic roles funders can play in encouraging and supporting organizational effectiveness among nonprofits. http://www.geofunders.org/

- *Evaluation: The Good News for Funders* by Andrew Mott. This book by Andrew Mott, former director of the Center for Community Change, focuses on participatory approaches to evaluating social change groups. It is available on the Neighborhood Funders Group website http://www.nfg.org/publications/evaluation.pdf

STATE STRATEGIES FUND

A project of the Proteus Fund

SIX STATE PROJECT PROFILES

MAINE CIVIC ENGAGEMENT PROJECT

Founding

The Maine Civic Engagement Project began as the Maine Blueprint Project in late 2005 as a partnership of 14 organizations. A team of more than 100 individuals completed an eight-month planning process in the spring of 2006. 501 (c) 3 and 501 (c4) organizations have worked together as allowed by law since the project's inception.

Mission

MECEP is a non-partisan, long-term strategy for building state capacity in order to advance public policy which will bring and sustain a better future for all Mainers. This strategy will restructure the way allied organizations and individual activists work together to create a framework for positive social change built by informed, engaged and empowered citizens.

Budget

2007 budget - $425,000

Leadership and governance structure

Benjamin Dudley is the project's new executive director. There are 5.25 full time employees. The 25 member Civic Engagement Project Table meets six times per year to set overall priorities and direction of the Project, conduct joint planning and collaborative efforts, and refine the ten-year master plan. A seven member Steering Committee meets monthly and all major policy and fiduciary decisions are made by the Steering Committee. All aspects of the Project are evaluated annually and progress is measured against the ten-year plan.

Partners

League of Young Voters
Environmental Health Strategy Center
Maine Council of Senior Citizens/ARA
Maine Education Association
Maine People's Alliance

Maine People's Resource Center
Maine Equal Justice Partners
Maine AFL-CIO
Sierra Club – Maine Chapter
Planned Parenthood of Northern New England
Maine Center for Economic Policy
Equality Maine
National Association of Social Workers
Maine Women's Policy Center
Maine Women's Lobby
Maine National Association for the Advancement of Colored People
Maine State Employees Association
Natural Resources Council of Maine
Preble Street Resource Center

Goals and Outcomes

MECEP measures advancement towards its mission in four areas:

1. Research and analysis to ensure that plans are driven by strategies ground in sound research through targeting analysis, a comprehensive state-wide civic participation voter file, polling and focus group data.
2. Sophisticated communications and policy programs to articulate a compelling vision for Maine's future and an ambitious series of coordinated training and media campaigns that will advance that vision.
3. Civic engagement and organizing that will use research data, voter-file, polling and focus group data, media and leadership training to dramatically expand the numbers of citizens actively engaged in issue education and policy change.
4. Building strong organizations and recruiting new leadership by providing training and technical assistance to identify and groom new nonprofit-sector leadership and candidates for public office.

Accomplishments

Below are some details of the Civic Engagement tools we are developing to help our partner organizations become bigger, smarter and more effective.

Sophisticated Targeting and Voter Files

1. Developing tools to better target our resources – In order to more effectively target limited resources, the Project developed an analysis of the voting behavior of Maine's 642 precincts over a nine-year period. Working with Strategic Telemetry, the Project developed a Progressive Index that ranked each precinct on how progressive or conservative the voting trends are per precinct. With this new tool, Project staff has became the major source of

targeting information for the progressive community, and specifically for the anti-TABOR campaign, identifying the most important areas and demographic groups in the state to direct the campaign's voter contact efforts.

2. Creating the state's best civic engagement voter file to enhance membership lists and boost organizational growth as well as to increase the effectiveness of nonpartisan voter contact efforts in motivating previously inactive members of the general public to vote. In 2006 Project staff created a high-quality voter file, maximized with training and technical assistance, which contained 236,000 registered voters accounting for approximately 25% of Maine voters. This gave the Civic Engagement Project sole control of an increasingly enhanced – and ultimately the best – voter file in the state.

3. We then utilized the civic engagement file to build partner's capacity and to defeat TABOR. Ten Blueprint partner organizations sent their membership files to have information from the voter file appended to their membership lists. The process improved membership records of Blueprint partner members in 17 target towns, allowing those groups to conduct more effective outreach and education to their members in those priority communities. Civic Engagement staff provided Citizens United, the coalition that opposed TABOR, with targeted volunteer recruitment lists of voters who belonged to any of the 10 Blueprint member organizations who voted in three or four of the last four elections. These lists were the best volunteer recruitment lists the campaign organizers had. The Project also donated 38,870 voter records for paid phone ID and persuasion mail provided by Citizens United. And we provided CU with 78,080 voter records for paid GOTV calls.

4. As we move forward we have dramatically expanded our file to 1.3 million records through Catalist. We have purchased an 18-month subscription to access their Maine data, which we will then add our data to. This will be a major step forward and provide our partners with a powerful tool for outreach, organizing and fundraising.

5. Enhancing Table Partner Lists – We will soon begin the process of enhancing the partner's lists with data from the civic engagement file. We expect that process to begin by late summer/early fall.

Our New Executive Director

6. The Project's search committee launched a national search to hire an experienced permanent director. The search lasted two months and yielded 30 applicants. After a rigorous interview process, the committee elected to hire Benjamin Dudley, the former chairman of the Maine Democratic Party,

and former legislator representing part of Portland. Ben began his new position August 13th

Effective Communications and Policy Coordination

7. One of the major components of the Maine Civic Engagement Project master plan is the creation of a communications shop to fill in the gaps in progressive messaging in Maine. The goal of this communications work is to link and significantly enhance the substantial existing work of state policy shops with civic engagement efforts at the state and local levels. Highlights of our work include:
    - Identifying key messages for collaborative policy campaigns. Working with state and national partners, we are accessing the most recent research to guide the identified policy priorities which are 1) Global warming, local solutions and the nexus between clean energy technology and job creation and environmental protection and 2) Tax and budget reform coupled with progressive economic development strategies. We shall commission one statewide opinion poll to determine best methods and best messages for advancing these issues.
    - Providing intensive training to Table participants through a series of peer learning clinics.
    - Tapping local Maine progressive talent in specific areas to put on short monthly "brown bag" discussions.
    - Working with Maine bloggers and exploring means to develop capacity for web-based organizing.

MICHIGAN VOICE

Founding
Michigan Voice was founded in 2005. It was derived from the work done through the America Votes coalition work in 2004.

Mission
Michigan Voice is a state based coalition of 48 organizations formed to improve long-term collaboration and communication among nonprofit civic engagement organizations in Michigan. The coalition's nonpartisan mission is to engage communities underrepresented or supportive of social justice in the democratic process and to establish collective action around a common issue agenda.

Budget
Annual budget $2.1 million

Leadership and governance structure
Michigan Voice has four employees, including Michigan Voice Coordinator, Ryan Friedrichs. The Michigan work, which is a sponsored project of the national Center for Civic Participation, is overseen by a leadership committee of five to seven members who supervise the coordinator. Michigan Voice partner organizations meet monthly and work is carried out between meetings by six work groups: ballot initiatives, communications, issue agenda, polling/targeting, race and the movement and technology.

Partners
A. Philip Randolph Institute Education Fund
ACCESS
ACLU Fund
ACORN
APIA Vote – MI
Black Youth Vote
Catholics for the Common Good
Center for Progressive Leadership
Clean Water Fund
Ecology Center
Environment Michigan
Gamaliel of Michigan
Grassroots Alliance
International Union of Operating Engineers
MARAL Foundation
Mary Church Terrell Council for Community Empowerment
Michigan Education Association

Michigan AFL-CIO
Michigan Campaign Finance Network
Michigan Citizens Education Fund
Michigan Environmental Council
Michigan Equality Education Fund
Michigan League of Conservation Voters Education Fund
Michigan League for Human Services
Michigan League of Women Voters Education Fund
Michigan Legal Services
Michigan Pride at Work
Michigan Prospect
Michigan State Conference NAACP
Michigan United
Michigan Unitarian Universalist Social Justice Network
Michigan Universal Health Care Access Network
MOSES
National Organization for Women Education Fund
Native Vote
Project Vote
PIRGIM
Planned Parenthood Affiliates of Michigan
SEIU Michigan State Council
Sierra Club
Triangle Foundation
TransGender Michigan
UNITE HERE
United States Student Association
Voice Your Vote
Wellstone Action
Young People for the American Way

<u>Goals and Outcomes</u>
Michigan Voice measures advancement towards its mission in three key areas:

1 Increased vote share of voters flagged on the voter file as underrepresented or social justice oriented
2 Rigorous and regular opinion polling that measures the development of a social justice issue environment
3 Increased identification and training of organization leaders, volunteers, and future candidates.

Michigan Voice partners identified collaborative strategies or economies of scale that they could pursue together to lower their collective costs and increase their individual effectiveness:

- Central 501(c) 3 Voter File
- Coordinate Voter IDs, Registration and GOTV
- Polling: Issue ID and Ballot Initiative
- Communications/ Media Hub
- Statewide Progressive Summit
- Ballot Initiative Development
- Training

Accomplishments

- In 2006 piloted a central 501(c)(3) voter file with Catalist that 34 statewide organizations used, delivering a potential cost savings of $1.7 million.

- In 2006 participating organizations made 79,950 door-to-door, 85,166 volunteer phone, and 144,071 mail contacts using the central voter file, as well as the enhancement of over 190,000 membership records.

- In 2006 organizations launched ballot initiative campaign that forced lawmakers to pass legislation increasing the state minimum wage from $5.15 to $7.40 over the next two years.

- In 2007 hosted the first ever progressive Michigan Policy Summit, focused on health care reform, clean energy and education reform, over 400 attended, with coverage on 11 radio stations, 3 TV stations, 6 publications (including an AP story), and several blogs.

- In 2007 have raise $1.8 million to date to support organizations gathering 209,000 issue IDs, registration of 134,700 new voters, and cutting edge modeling/microtargeting surveys for 3 to 4 issues of 7,000 to 9,000 voters.

BLUEPRINT NORTH CAROLINA

Founding
September 2006

Mission
Blueprint NC is a coalition of 40 state-level advocacy organizations. The coalition began as a convening of Z. Smith Reynolds Foundation's state policy advocacy grantees. The initial objective was for the grantees to figure out how they could work together more effectively. The groups continued to convene with more focused discussions. It became obvious that in order to build their capacity to work together and move one another's issues forward in a more effective way, they would need to expand their number to include organizations not represented in the original grouping.

Budget
2007 budget - $350,000

Leadership and governance structure
Blueprint NC currently has three full time employees, including director Julie Mooney, a civic engagement director and a communications director. The members of the Blueprint Coalition meet three times a year. North Carolina's work is guided by a nine-member steering committee that meets monthly to guide the work and make critical decisions. Three other committees – communications, civic engagement, and participation – advance the programmatic work and advise the project on how to be more fully representative of the nonprofits in the state that share Blueprint goals. The civic engagement table convenes monthly. The communications group meets every four to six weeks.

Partners
Action for Children
Carolina Justice Policy Center
Center for Community Self-Help
Center for Death Penalty Litigation
Common Cause Education Fund of NC
Common Sense Foundation
Community Reinvestment Association - NC
Conservation Council of NC
Democracy NC
El Pueblo
Equality NC
Fair Trial Initiative

Generation Engage
Institute for Southern Studies
Ipas
John Muir Foundation (Sierra Club)
Land for Tomorrow
NAACP
NARAL Pro-Choice NC
NC ACORN
NC Association of Black Elected Officials
NC Association of CDCs
NC Center for Voter Education
NC Coalition Against Domestic Violence
NC Coalition Against Sexual Assault
NC Community Development Initiative
NC Conservation Network
NC Council of Churches
NC Environmental Defense
NC Housing Coalition, Inc.
NC Institute of Minority Economic Development
NC Justice Center Education Law Project
NC Justice Center
NC Latino Coalition
NC Policy Watch
Planned Parenthood Health Systems
Planned Parenthood of Central NC
Public School Forum of NC
SURGE
Traction

Goals and Outcomes

Blueprint North Carolina measures advancement towards its mission in three key areas: Message/Communications, Civic Engagement, which will include establishing a voter file project and Policy Advocacy.

The Communications Plan focuses on creating better progressive messages to engage more people across the state and more effectively reach legislators and the media as well as utilizing new messages consistently to alter the terms of the debate. Success will be measured by the development of new messages, increased organizational capacity to utilize new messages and the ability to engage voters with these messages.

The Civic Engagement Plan focuses on increasing voter participation and building leadership capacity to encourage learning, advocating and voting on

issues, including holding elected officials accountable. Success will be measured through organizational capacity and increased voter turnout

The Policy Advocacy Plan focuses on increasing the strength of the nonprofit policy advocacy community so more organizations work in sync with one another, are supportive of their agendas, and advance policy that makes for a more progressive North Carolina. Success will be measured by the increase of policy advocacy organizations that are part of Blueprint North Carolina working in coordination with state-level grassroots organizations.

Accomplishments

1. With assistance of Grassroots Solutions, developed a broad plan for civic engagement work and have put in place a series of voter engagement pilot projects for 2007 municipal elections that represent new levels of nonprofit collaboration – between state-level Blueprint groups and locally based nonprofits. Three collaboratives are in place – Charlotte, Fayetteville, and Wake County – and Blueprint is connecting these efforts with voter engagement training (through Wellstone Action), the voter file, messaging, and other tools and resources. 2008 work will build on these pilots.

2. Contracted with Catalist and are actively drawing on the voter file to get information to partners for pilot work in 2007 municipal elections. Training to equip partners so that they can access the voter file themselves will happen soon.

3. Built (and continue to build) communications capacity on the part of partner groups, yielding: organizations with new communications plans; increased media attention to organizations as a result of new tools (e.g., headlines, op-eds); a systematic approach to getting stories to the media from Blueprint organizations through a media "hub" function of our partner NC Policy Watch; and an ability for Blueprint organizations to begin to frame their messages in language about values that research shows resonate with North Carolina voters.

4. Capacity building on messaging has led to new cross-issue collaboration. For example, in response to a regressive Senate budget proposal in the 2007 legislative session, 40+ organizations, representing social justice, labor, civil rights, environmental concerns, affordable housing and education, coalesced around a letter to legislative leadership and related talking points. These efforts and others resulted in the decision of lawmakers to buck the powerful realtor lobby and give counties the authority to conduct referenda on local transfer taxes and the decision to pass a state Earned Income Tax Credit.

5. Commissioned a statewide poll and regional focus groups, revealing initial information about the points of intersection between Blueprint NC partner

group's values and the values of NC voters - *particularly freedom, health, opportunity, honesty, integrity,* and *justice/fairness.* Also learned that voters want to know *"What's in this for me?"* and are more likely to respond to messages that suggest a moral imperative, a right and a wrong: *"It is the right thing to do."*

NEW MEXICO CENTER FOR CIVIC POLICY

Founding
The New Mexico Center for Civic Policy (Center), founded on July 1, 2006, is fiscally sponsored by the New Mexico Community Foundation while applying for its own 501(c)3 status with the IRS. The Community Foundation allots its 501 H election for the Center's work. They have a sister 501(c) 4 organization, the Center for Civic Action that has been incorporated.

Mission
The Center, which has five 501 (c) 3 partner organizations, uses a state integration model to change the policy environment in the state. The use the term "state integration" instead of "state infrastructure" to describe the package of functions needed to achieve measurable outcomes. The term "integration" recognizes the need for a deliberate division of labor with existing players and invites new functions, strategies and innovations to increase the reach and capacity of existing structures and organizations.

Budget
2007 - $650,000
2008 - $1.3 million

Leadership and governance structure
The New Mexico Center for Civic Policy currently has six employees, including executive director Eli Lee. New Mexico operates with a strong staff-driven model and has a three-person board for its c-3 organization and a three-person board for its c-4. One of the c-3 board members is from a partner organization and two of the c-4 members are from partner organizations. The others are chosen for what they bring as individual leaders of community and state organizations.

Partners
Common Cause
Conservation Voters New Mexico
League of Young Voters
SAGE Council
Southwest Organizing Project

Goals and Outcomes
The Center for Civic Policy's goal is to maximize impact in the civic engagement and electoral arenas by:

- Building a socially responsible base of 155,000 New Mexicans, representing 20% of the voting electorate, in 23 of New Mexico's 33 counties.

- Creating an issue environment with 60%+ support for a set of carefully-selected, community-focused policies and concrete policy wins at local and state levels

- Identifying and training 20 civic leaders each year in New Mexico on how to run for elected office.

Accomplishments
- Identified 16,278 socially responsible voters on the state voter file, or 2% of the 2004 Presidential turnout.

- Passed two "Clean Elections" ethics reform bills; blocked an ALEC (American Legislative Exchange Council – a pro-industry, conservative think tank) "regulatory reform" bill; and blocked an $85 million tax break for the Desert Rock coal-burning power plant.

- Developed the Policy Study Group, a socially responsible legislative caucus comprising eleven members of the New Mexico House of Representatives.

- Developed our first annual benchmark poll, setting the baseline for measuring changes to the issue environment.

- Delivered 51 earned media stories, op-eds or letters; 6 paid radio ads; and 13,000 pieces of direct mail for our partner groups on ethics and ALEC to targeted households in targeted districts.

- Identified and trained 5 potential future candidates and identified 8 potential campaign staff.

- In partnership with the Organizational Development Program at the McKay Foundation, strengthened our partner and allied organizations through 21 training and technical assistance sessions.

- Created a shared voter file with private phone match, saving an estimated $16,000 if groups had purchased voter files separately.

- Developed the State Integration Pilot Project, working with Michigan Voice, Colorado Progressive Coalition and the Oregon Bus Project. Through this Pilot, CCP has assisted several other state organizations in the development of their state projects.

MINNESOTA CIVIC ENGAGEMENT PROJECT

Founding
An initial meeting to discuss this work was held in 2005 but the real development of a c-3 table began in 2006.

Mission
The project's purpose is to use new tools and strategic targeting, along with large scale direct communications and organizing, to learn more about Minnesotans who should be participating more fully as voters and to begin a long term effort to engage them on issues that they care about. The primary objectives are to increase the sophistication and effectiveness of c-3 organizations in the conduct of their voter engagement programs. This will be accomplished though the assessment of partner programs and technological needs, the building of knowledge within partner organizations on the use of the civic engagement tools and techniques and on coordinated and strategic outreach to Minnesotans.

Budget
May – December 2007 $1,305,000
January-December 2008 $1,255,000

Leadership and governance structure
There is a long history of strong collaborative work in Minnesota. This project builds upon that history, establishing a trusted planning group that includes Clean Water Fund, Wellstone Action Fund, Grassroots Solutions, and Take Action Minnesota Fund to lay the initial plans, secure funding and bring the table partners together. These partners guide the planning and process for allocation of funds, working with other partner organizations to establish a clear and transparent process for setting priorities and allocating funds. Wellstone Action Fund manages the funds, at the direction of the collaborative, recusing itself from decisions on any specific proposals that would benefit them.

Partners
The c-3 table is still being built but these are current core partners.
Clean Water Fund
Environmental
Justice Advocates of Minnesota
Minnesota Council of Nonprofits
Minnesota Immigrant Freedom Network
Minnesota ACORN
Out Front Minnesota
Planned Parenthood
Resource Center Of The Americas

SEIU Local 26
SEIU Minnesota State Council
Somali Action Alliance
Take Action Minnesota Fund
Urban Embassy
Waite House
Wellstone Action Fund
Working For Good Jobs In America Fund
Yo! The Movement

Goals and Outcomes
Phase 1:
- Civic engagement file set up with base data, staff and infrastructure to serve current and future partners.
- Civic engagement file enhanced with scores that indicate citizens' likelihood to support a social justice agenda, or to join a participating organization.
- Script developed that will be used for the canvass ID program in Phase 2.
- Final turf determined for canvass program that utilizes all available data.
- Evaluation methodology developed to test the efficacy of the models.
- Communications hub established.

Phase 2:
- At least 200,000 new ID's on the civic engagement file in key fast growing areas of Minnesota. In this case an ID actually represents multiple data points, as we are planning to ask multiple questions at the doors.
- At least 125,000 new supporters.
- Begin on-going conversations with new supporters through follow-up phone calls and mail.
- Civic engagement file enhanced with scores that indicate citizens' likelihood to support a social justice agenda.
- Newly trained canvassers and canvass managers that can be tapped for future projects.
- Conduct CE File training for partners and assess their capacity need for full file utilization.

Phase 3:
- A minimum of two contacts, to a universe of at least 75,000, in order to engage supporters directly with partner organizations.
- Addition of key technical and financial support for partners to utilize the CE File.
- Enhancement of the CE File in communities of color and immigrant communities through field work.

- Increased turnout in underrepresented communities, with a specific goal set by January of 2008.
- Six additional professional organizers working in communities of color and new immigrant communities.
- Increased organizational capacity to design and implement effective voter contact and turnout programs.
- Community-based organizations that are more engaged in the political process, and prepared to run more effective programs in future election years.

Accomplishments
- Set up of the civic engagement file including initial c-3 targeting, data enhancements, field turf analysis and mapping for field work; began matching data for c-3 groups who have c-4 affiliates who are already collaborating

- Monthly convening of 15 - 20 table partners since December 2006 to provide a forum for coordination of civic engagement strategies and a brain trust for strategic direction

- Appointed a planning team to help guide the work plan between monthly meetings. Members include representatives from Wellstone Action Fund, Clean Water Fund and Take Action Fund. With assistance from Grassroots Solutions, the group is working to secure start-up funding and begin convening and coordinating the table

- Design of c-3 field program that will 1) gather progressive issues IDs in targeted c-3 areas, 2) identify likely progressive supporters and 3) gather "permanent" ID information in key areas

- Set up of c-3 communications hub Alliance for Better Minnesota Fund to conduct issue polling, issue research, message development and communications planning and assistance for partners

- Hired to staff members to begin c-3 coordination

- Raised $1.2 million

WISCONSIN NETWORK

<u>Founding</u>
The planning work called Wisconsin Blueprint began in 2005 and the Network was founded and began operation in 2006.

<u>Mission</u>
The Network's goal is to ensure that public policy once again represents the interests and values of Wisconsinites. The Network creates the space for partnerships between organizations and activists working at the state and local level to integrate Wisconsin's progressive infrastructure. With a ten-year vision, the Network is being built with a commitment to share current capacity and invest in thoughtful collaborative projects that will revitalize the progressive movement. Starting with a shared vision, participants are committed to research-driven policy and programs, non-duplication of efforts, common messages, integrated functions, and shared civic engagement files.

<u>Budget</u>
The 501(c) 3 2007 budget is $1.48 million

<u>Leadership and governance structure</u>
The Network is a strategy, not an organization, with 37 core organizational participants, and up to 100 loosely connected organizational participants. There is no director or coordinator but consultant Julia Kaufman is employed half-time to facilitate processes. A search process is underway to hire a coordinator for the newly formed c-3 table. There is also a coordinator for the c-4 work. All staff members hired under the Network plan are integrated into member organizations and are accountable to those organizations. Wisconsin uses more of a management team than a governance vehicle because with its decentralized structure, there's very little if anything to govern. In an effort to create a more fluid, organic structure 'owned' by a broader set of stakeholders, the coordinating infrastructure is now made up of Executive Directors from a set of key progressive organizations including the c-4 director. This group, known as the Network Committee meets on a monthly basis to review issues and further develop plans as project implementation progresses. This group includes individuals recognized by the Network as legitimate leaders within the collaboration and within their own organizations. They will do the heavy lifting, make key strategy decisions, and have the big picture conversations.

<u>Partners</u>
The Network includes but is not limited to the following partners:
ACLU Wisconsin
ACORN (Association of Community Organizations for Reform Now)

America Votes Wisconsin
American Federation of State County and Municipal Employees (AFSCME)
American Federation of Teachers (AFT)
Americans for Democratic Action
Apprentice Organizers Project
Center on Wisconsin Strategy (COWS)
Citizen Action of Wisconsin
Clean Water Action
Clean Wisconsin
Coalition for Wisconsin Health
Eau Claire Progressive Student Association
Eau Claire Campus Feminists
Eau Claire Progressive Media Network
EMERGE
EMILY's List
Fair Wisconsin
First Congregational UCC of Eau Claire
Good Jobs and Livable Neighborhoods
Good Shepherd Lutheran Church in Eau Claire
Greater Wisconsin Committee (GWC)
Hmong American Friendship Association (HAFA)
Interfaith Coalition of Milwaukee
NARAL
9 to 5
One Wisconsin Now
Planned Parenthood of Wisconsin
Progressive Majority
Racine Interfaith Coalition
Racine Chapter of NAACP
SEIU (Service Employees International Union)
Sierra Club
Steelworkers
Unitarian Universalist Church of Eau Claire
Voces de la Frontera
Wisconsin AFL CIO
Wisconsin Council of Churches
Wisconsin Education Association Council (WEAC)
Wisconsin League of Conservation Voters (WLCV)
Women's Choice

Goals and Outcomes

A. Build a powerful base of nonpartisan activists and supporters in Wisconsin who are dedicated to working for progressive change, issues and values on a variety of fronts:

- Unify local and statewide efforts by identifying building block issues
- Build, coordinate and sustain the capacity of local organizations to address progressive issues important to them and within Network goals
- Expand the number and variety of organizations as partners in the Network with particular emphasis to recruit, train, place and mentor organizers within communities of color on the local and statewide level

B. Advance progressive issue and organizing campaigns in targeted communities and statewide

- Continue Western Wisconsin focus
- Expand work in Milwaukee, Southeast Wisconsin (Racine/ Kenosha) and Green Bay/Fox Valley

C. Increase the ability of progressive organizations to sustain the activities and vision of the progressive movement in Wisconsin by developing the Network infrastructure

- Build a reliable, committed and sustainable coordinating infrastructure to guide the development and implementation of the Network vision, plans and related activities
- Make ongoing communication between and across organizations a fundamental part of ongoing Network development
- Invest in individual and organizational capacity building through training and focused leadership development strategies

Accomplishments

The civic engagement and other organizing programs that comprise the Network's 2006 accomplishments demonstrate an unprecedented level of collaboration between progressive groups in research, messaging, use of a common civic engagement file, and sharing responsibility for on the ground programs. These collaborations now serve to amplify policy and communication efforts of individual Network organizations. Rather than relying on anecdotal evidence or "gut hunch", research and polling is driving policy and programs. Additionally, the staff being hired within Network organizations is becoming the basis for new progressive leadership in the state, importantly including individuals from communities of color. Accomplishments include:

T   completed extensive geographic targeting research based on demographic, political, and economic trends and selected three organizing regions upon which to focus work in 2006 - western Wisconsin, Racine/Kenosha, and

Milwaukee; and two additional regions for 2007 and 2008: northeast Wisconsin, and greater Madison

T   created a c-3 civic engagement file (hosted at Citizen Action of Wisconsin Education Fund); training 37 organizational leaders in its use. We fully integrated the new file, targeting, and modeling into all campaigns

T   created the Institute for One Wisconsin, a 501(c)3 organization to shape the message and shift the debate in order to advance progressive ideas by linking research, policy and communications

T   developed a successful integrated Health Care Ballot Initiative: coordinating with key partners, the Network initiated universal health care referenda in Eau Claire County and the City of Racine. This was copied by nine other municipalities and won overall by an 82% margin. This campaign and subsequent media coverage set the stage for Legislative action on comprehensive health care reform in 2007 and the "Wisconsin model" is now being written about in national publications

T   shifted the Policy Environment: Fall 2006 election polling showed health care as the top issue in a key Eau Claire Senate district, where April 2006 polling had shown taxes as the top issue of concern. All five victorious Senate and Assembly candidates in Eau Claire and Racine publicly declared health care as the top issue in their victories

T   provided vital research-based issue information from a statewide 501(c)3 organizations issues poll and helped guide the selection of health care reform as our first major issue campaign; gave strategic poll briefings to a combined audience of over 150 individuals

T   produced and released an original study, "Regional Variations in Wisconsin Health Insurance Costs," which was promoted through local events in the key targeted regions of the state. This integration of organizing and policy work led to massive local press coverage (27 distinct media stories) which further elevated the health care issue just before the election

T   conducted a "capacity mapping" survey of 44 Milwaukee organizations that primarily serve communities of color or women, outlining conclusions to guide Milwaukee work that include creating opportunities for organizations to: relate and collaborate across customary boundaries; engage in advocacy and systems change; participate in long-range strategic planning; and

develop and disperse leadership. To support these priorities, funding was provided to:

- T   conduct a fall election civic engagement program for the Latino community with an accompanying paid media radio campaign targeting drop off voters in 23 wards. A door-to- door canvass provided education on voter rights and provided voter registration
- T   a collaborative c-3 civic engagement program with the Hmong American Friendship Association to engage the over 20,000 Milwaukee Hmong about the importance of voting in the 2006 elections