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## NEW WAYS TO KEEP UP OUR END OF THE POLICY CONVERSATION

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### NEW CHALLENGES BREED NEW POLICY APPROACHES

MANY VOLUNTARY ORGANIZATIONS HAVE ACTIVE POLICY ADVOCACY AGENDAS and devote important resources to this role, promoting the issues and interests of their constituencies and policy changes aimed at furthering their mission. Unfortunately, many of these organizations also lack the capacity to achieve the policy impact they are after.

Changes in Canada's economic, fiscal, and policy environment have made it more challenging than ever for voluntary organizations to play an active and effective policy advocacy role. They have also acted as a catalyst for new approaches that offer important lessons and opportunities for the entire sector. This article looks at the element of successful policy advocacy and new ways of building policy capacity, and suggests some practical steps that organizations and the sector as a whole can take to strengthen its policy voice.

### WHAT IS POLICY CAPACITY?

Policy capacity is the ability to develop and communicate advice to governments on issues we care about in ways that have a reasonable chance of affecting the course of government decisions. This includes advocacy capacity or the ability to persuade governments to adopt the policies one is promoting.

Many voluntary organizations dedicate some portion of their staff, volunteer, and financial resources to policy advocacy, but my guess is that only a small proportion can honestly point to concrete results arising from their efforts. What distinguishes organizations that are making a real impact from the rest? Policy capital – a complex mix of factors that, for simplicity's sake, can be broken down into four main elements: good ideas, broad networks, quality relationships, and the ability to deploy these strategically to achieve a policy goal.

Good policy ideas have to meet certain tests. They must be substantively and politically relevant, built on sound research and analysis, and serve the broader public interest. They also need to be communicated effectively in ways that resonate with governments and their priorities.

Organizations also need broad networks – in their own sector, across sectors, and within government. These enable them to access resources, information, intelligence on

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what's happening and why, and to enlist the support of influential allies inside and outside government.

Networks only deliver, however, when the relationships involved are positive ones. Relationships don't need to be deep – weak ties are often all it takes – but there must be a modicum of trust and goodwill for information and other forms of cooperation to flow. Organizations that have longstanding relationships with policy makers are often more trusted because they have had the chance to prove their reliability as a partner over time.

Finally, organizations need strong strategic capacity to make sense of the dynamics of their issue and to chart an effective course toward their goal. This strategic capacity is closely tied to knowing how governments work – their culture, what drives them, and who influences and makes what decisions. It also requires an ability to see policy change as an ecological, rather than mechanical, process that takes place within a complex set of overlapping systems that continually generate new surprises – some are roadblocks and others windows of opportunity, but only to organizations that are vigilant and flexible enough to adapt and move quickly.

#### **CURRENT STATE OF OUR POLICY CAPACITY**

Historically, well-developed policy capacity in the voluntary sector has largely been found in larger national and provincial organizations, established associations and coalitions, think tanks, and some smaller and medium-size organizations with strong policy/advocacy missions and related expertise.

In recent years, significant voluntary sector policy capacity has been lost through the withdrawal of federal funding from national voluntary organizations, organizational financial constraints arising from the recent recession, the demise or diminishment of progressive think tanks, the absence of government-supported policy consultation and dialogue processes involving the sector, and advocacy chill arising from the regulatory regime governing charities and federal government decisions to withdraw funding from organizations perceived to be critical of its policies.

#### **THE NEW POLICY PLAYERS: “UN-ORGANIZATIONS”**

While this seems a rather bleak picture at first glance, these changes to the policy environment have been part of the impetus for an entirely new kind of voluntary sector policy player to emerge, what author Paul Jurbala calls “un-organizations” or “communities of purpose” – groups that want to see something happen and come together to see how they can make it happen (Jurbala, 2009).

These take a range of forms but are all relatively informal collaborations of organizations and individuals, united in support of a shared aspiration or goal, with a strong innovation focus, and highly skilled at building sectoral and cross-sectoral policy consensus and using this to influence government policy. Participants choose how and how much they wish to participate, and the focus is on contributory leadership – “stepping up” – rather than prescriptive membership and contribution arrangements. Communities of purpose deliberately keep organizational structure, overhead, and long-range plans to a

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minimum and focus instead on animating dialogue, surfacing priorities everyone can get behind and catalyzing concrete action around these – drawing on resources and expertise from participants and outside expertise for targeted projects when needed. Good examples of this new way of working include the Sport Matters Group and the Toronto City Summit Alliance.

Sport Matters Group is an informal national collective of sport leaders that has effectively reshaped Canada's sport policy landscape, transformed the way the sport sector sees itself, and seeded a wide range of innovation initiatives in the sport sector. All this has been accomplished with two staff working in a donated office.

The Toronto City Summit Alliance is a civic coalition of public, private, and voluntary sector leaders from the Toronto region, also supported by two staff, that has launched the Luminato Festival of Arts and Creativity (now one of the world's largest arts festivals), an in-depth review of income security programs that led to the introduction of the federal working income tax credit, the Toronto Region Immigrant Employment Council that has placed over 3,000 highly skilled new immigrants in well-paying jobs through mentoring and internship programs, as well as many more initiatives.

Both of these organizations have highly entrepreneurial leadership with a strong focus on aspirational goals, an eye for opportunity, and a *modus operandi* that leads and invites governments to follow. Because they are not service delivery organizations, they can strike out independently, unconstrained by the government funding relationships typical to many voluntary organizations. As a result, these catalytic organizations can take positions and risks that many other voluntary organizations cannot.

Given the success of these “un-organizations,” it's worth considering how we can both build policy capacity within existing voluntary sector organizations and create new, more flexible, and entrepreneurial arrangements that are purpose-built to do what standard organizations cannot.

#### **IN OR OUT OF THE POLICY BUSINESS?**

Before considering how voluntary organizations can build their own policy capacity, it is worth taking a minute to consider who should actually be in the policy business. Organizations that are inadequately equipped to pursue policy development are unlikely to achieve the ends they are after and only end up diverting resources away from more effective strategies to advance their mission.

Organizations need to ask themselves a few key questions before spending hard-won resources on significant policy initiatives:

- Is policy advocacy central to our mission?
- What capacity do we need to do this well and do we have the resources?
- Do we have the internal expertise and leadership to drive this function?
- Are we bringing something unique to the table (i.e., not duplicating or competing with another organization's efforts)?
- Is our aim to be a policy leader in this domain?

Organizations that answer no to most of these questions should take a step back and fundamentally rethink their decision. This does not mean organizations cannot lend their voice to advocacy efforts or contribute to policy development efforts – most organizations probably should. The question is whether they should be developing their own independent policy capacity or, instead, lending their support to the efforts of partner organizations that are better equipped to do the core policy work.

#### **UNDERSTANDING GOVERNMENTS AND HOW THEY WORK**

For organizations that do see policy as core to their mission, strengthening policy capacity boils down to three key challenges. The first is increasing their basic understanding of governments and how they work. The second is improving policy and advocacy skills and the quality of policy output. The third is securing the resources to actually undertake policy and related advocacy work.

Like any endeavour, policy development requires an appreciation and respect for the culture, values, objectives, and practical constraints of all the parties. Consequently, just as businesses make it a priority to know their customers, voluntary sector organizations must make it their business to know governments. Right now, too many organizations lack basic knowledge of how governments think and work and how to influence them.

How do we change this? First, make “government 101” a core competency for board members, senior staff, and other staff that interact with government, and provide appropriate learning opportunities. This can be done through conference workshops, in-house training, or informal ‘lunch and learn’ sessions. To keep costs low, organizations can work through national or provincial organizations and associations to develop shared resources, draw on expert volunteers, or just invite government officials to speak to staff about how their organization works. Any knowledge is better than none.

Second, recruit volunteers with direct government experience to sit on boards, participate in advisory committees, teach staff, and participate directly in policy development and advocacy efforts. Aim for volunteers who are familiar with how the political level works, as well as the civil service.

Third, establish professional exchanges or paid six-month internships for voluntary sector staff with federal, provincial, and local governments. Many past efforts of this kind have drowned in a sea of red tape, but there is no substitute for direct government experience, so it is worth a try. Internships are likely easier to achieve, so a good place to start.

#### **IMPROVING POLICY AND ADVOCACY SKILLS AND OUTPUT**

In addition to real knowledge of how government and policy making processes work, policy development and advocacy require significant research, analytic, strategic, communication, brokering, and political skills. A strong entrepreneurial bent is also useful.

Many organizations lack a full appreciation of the skills required and under-hire as a result. Others over-emphasize academic credentials at the expense of relevant practical knowledge and experience. Others cannot afford experienced policy people, so they hire

someone younger and less experienced, but competent, in the hope that they will learn on the job. This is not a bad strategy under the current circumstances, but we can be doing more to give future and aspiring policy staff the skills they need to do the job. Here are a few suggestions.

First, the sector as a whole would benefit from an objective, empirical analysis of the policy and advocacy skills, education, and experience required for sector policy positions at different levels. This could be used to develop guidelines for organizations to use in their hiring and contracting decisions. This might be something the Voluntary Sector Human Resources Council could undertake.

Second, we need to establish more policy and advocacy skills training programs for voluntary sector staff – frontline and management. Right now, a variety of volunteers and consultants offer *ad hoc* sessions on demand, but a more systematic approach could quickly raise the skill level across the sector. Basic skills training in policy and advocacy should be part of all nonprofit management programs, but we also need more programs like the Maytree Foundation's Public Policy Training Institute aimed at frontline staff with advocacy and policy responsibilities. Ideally, one of the key foundations active in the sector would lead an initiative to develop a top-notch curriculum and recruit delivery partners across the country, with an adapted online version for learners in remote areas.

Third, organizations with related policy and advocacy interests should consider creating organized ongoing opportunities for peer-to-peer, policy, and advocacy focused knowledge exchange and training. These could help to foster greater collaboration across organizations, leverage greater return from research and other knowledge investments, and enable organizations to access expertise, data, analysis, and other policy resources they lack in-house.

Fourth, organizations active in policy advocacy should establish policy advisory committees made up of volunteers with strong policy and government backgrounds to help improve quality, enhance strategic focus, and support staff learning and development. Many former government officials and policy experts enjoy these opportunities to put their skills and knowledge to work for causes they care about and can make a big difference to the impact of policy and advocacy efforts.

Fifth, organizations need to regularly evaluate their policy and advocacy efforts, as they would other programs, to identify ways to improve them. As part of this process, they should invite the government officials they frequently interact with, as well as sector partners, to provide feedback and suggest improvements.

#### **MOBILIZING RESOURCES FOR POLICY WORK**

While skilled and knowledgeable people are essential, without resources to finance policy work, they are just more race horses in the barn. Government funding to support voluntary sector participation in policy making has significantly diminished, while fundraising for policy and advocacy work remains a perennial challenge. At the same time, many organizations are investing scarce resources in solitary and, at times, ineffective policy and advocacy efforts.

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All of this speaks to the need to take a good look at who is achieving policy gains in the sector, despite these challenges, and why they are succeeding when others are not. While it may be true that someone else's policy target is an easier mark than your own or their budget larger, a number of organizations are consistently scoring policy hits while the rest of us, for all intents and purposes, remain on the bench. It's time to acknowledge we have something important to learn as a sector from these high scorers and to get serious about finding out what it is.

A quick scan of my own policy beat tells me that they all look a lot more like the “un-organizations” described above than the typical non-profit organization – which is not to say that organizations should burn their letters patent and “unorganize.” What it does suggest is that new, more fluid forms of collaboration are emerging that are radically different from the old forms we are used to. These new modes of working are particularly well suited to large scale policy efforts that would otherwise be too costly and substantively broad for any one organization to tackle. In other words, they are good for more integrative policy initiatives that cut across traditional organizational, sectoral, and disciplinary boundaries.

Equally importantly, these collaborations leverage enormous resources by voluntary sector standards – mobilizing technical committees, running national consultations, doing primary research, hiring experts, and producing top drawer policy. The secret to this miraculous loaves-and-fishes scenario? They simply decide with participants what they need to get the job done and then invite everyone to contribute what they want. This contribution ethic explains why organizations like Sport Matters Group and the Toronto City Summit Alliance, with tiny staffs and minimal budgets, continue to weave their policy magic while many organizations are stuck just trying to make ends meet.

The bottom line, however, is that we need to take a much deeper look at these communities of purpose than the hasty impressions I've offered here. So, as my final suggestion, I invite sector leaders to “step up” and jointly undertake this analysis, so we can take the lessons that emerge, put them to work, and sprinkle some of this magic more broadly across the work that all of us do.

#### **KEEPING UP OUR END OF THE CONVERSATION**

Voluntary organizations are the organized expression of our civic desires and one of the main ways that Canadians communicate their values, hopes, and ideas to each other and to the world. Policy advocacy is an important thread in this broader conversation and why we need to do everything we can to maintain the voluntary sector's policy voice. By taking advantage of these new ways of doing things, we can keep up our end of this important conversation and help ensure all Canadians continue to have opportunities to express their views on the issues that matter to them.

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#### **REFERENCES**

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