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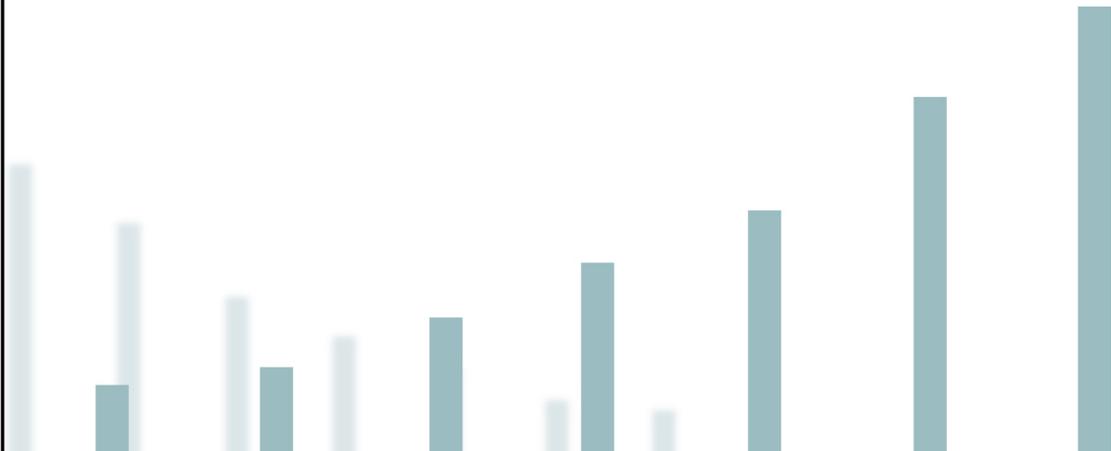
The National Council of La Raza

Unleashing the Power of an Affiliate Base



Susan Colby

Tia Martinez



The Latino civil rights movement has gained incredible momentum in the United States since the dawning of the 21st century. Driven by the explosive growth in immigration from Mexico and Central America, Hispanics became the largest minority group in the United States in 2001.¹ The Latino community has been making gains in education: 2.7 million Hispanic Americans ages 18 and older held a bachelor's degree in 2004, roughly double the number only a decade earlier. It is becoming a stronger economic presence: 1.6 million Hispanic American-owned businesses were in existence in 2002, up 31 percent from 1997. It is becoming a political force to be reckoned with: 7.6 million Hispanic Americans reported voting in the 2004 presidential election, up from 5.9 million four years earlier.²

The National Council of La Raza (NCLR), the largest national Hispanic civil rights and advocacy organization in the United States, has been a major force behind these gains. Since 1968 it has been at the forefront of every major policy initiative affecting the Latino community. During the 1980s, for example, NCLR played a central role in shaping immigration reform legislation that legalized over two million Hispanic immigrants. In the early 1990s, NCLR successfully fought to make Spanish-speaking children eligible for federal education funding under Title I, increasing Latino students' access to millions of dollars worth of Title I-funded services in lower-income school districts.³ More recently, NCLR has been a key player in the movements to increase and shape the earned income tax credit and to create other policies that support the working poor.

The on-the-ground efforts of NCLR's nearly 300 affiliates are an essential complement to these policy successes. The affiliates are a diverse group of independent community-based organizations, ranging from small local arts organizations to multimillion-dollar community development corporations. They

¹ U.S. Census Bureau

² U.S. Census *Facts for Features* release, September 8, 2005.

³ Title I is currently the largest federally funded education program. It provides financial assistance to schools with high numbers or percentages of poor children to help ensure that all children meet challenging state academic standards.

provide the Hispanic American community with a wide array of programming, including: charter schools, after-school programs, English language classes, job-readiness and training programs, homeownership counseling, health centers, and community activity centers. Their level of involvement with NCLR varies considerably, from attending NCLR's annual national conference to collaborating actively with the NCLR national office to develop innovative programs.

Despite the recent achievements and gains, however, steep challenges remain. While three out of four white ninth graders graduate from high school, only slightly over half (53%) of Latino students do so.⁴ The poverty rate among Latino families is nearly double that of the general population. Hispanic Americans' rates of chronic diseases, such as diabetes, far surpass those of whites.

With its strong track record, vast affiliate base, and deep commitment to bringing about Hispanic American equality, there is no question that NCLR has an important role to play in helping the Latino community overcome the daunting challenges it continues to face. The arrival of Janet Murguía as the organization's new president and CEO in January 2005 served as the catalyst for an initiative aimed at clarifying NCLR's strategy and enhancing the relationship between the national office and its affiliates. With financial support from the Bill & Melinda Gates Foundation, Murguía and her leadership team engaged in a business planning process with the Bridgespan Group, to help pave the way for NCLR to maximize its impact on the lives of people in the Latino community.

⁴ Gary Orfield, Daniel Losen, Johanna Wald, and Christopher B. Swanson. "Losing Our Future: How Minority Youth Are Being Left Behind by the Graduation Rate Crisis," The Urban Institute, February 25, 2004. <http://www.urban.org/url.cfm?ID=410936>

Key Questions

Over a six-month period, a project team that included Janet Murguía, 10 other NCLR management team members, and five Bridgespan consultants worked together to plan for the organization's future. In setting a course for the team's work, the Bridgespan consultants drew on past work with national network organizations, such as Communities In Schools.⁵ These experiences pointed to the value of resisting the urge to dive straight into defining the role of the national office—however tempting that approach might be. Rather, the key to aligning the network around a common strategy was first, defining the impact goals for the network as a whole and a theory for how the network would bring about that change; next, crystallizing the specific roles affiliates could play most productively; and only then digging into to the specific supports the national office needed to provide affiliates.

The team members structured their work accordingly. To help determine how the power of the affiliates and the national office could be unleashed and combined to deliver the maximum impact possible, they addressed the following questions:

- What specifically does NCLR want to accomplish and what are the pathways for achieving this impact?
- How can NCLR's affiliate base best contribute to these efforts?
- How can NCLR's national office best support affiliates in their work?

⁵ To learn about Communities In Schools' business planning process, see the case study "Communities In Schools: Propelling a National Network to the Next Level," available free of charge at www.bridgespan.org.

Clarifying the Organization's Goals and Approach

NCLR's leaders held a compelling vision of the United States at its best. It would be a place where a person's race, ethnicity, or immigration status did not determine the opportunities available to him or her. It would be a place where Hispanic adults were as likely as whites to earn a living wage, to own a home, to vote. It would be a place where Latino children had the same chance as white children of growing up in a safe neighborhood, attending a decent public school, and graduating from a four-year college. Theirs was a vision not simply of equality of social, economic, and political opportunity, but also of equality of conditions.

Murguía and her leadership team knew that it would take many more decades to achieve this vision fully, and they were absolutely committed to the long-term struggle for social change. At the same time, they were acutely aware of the crucial importance of the next several years. The civil rights victories of the past few decades had put many of the necessary laws in place, but there was still much more heavy lifting required to translate those legislative wins into results on the ground. Victories at this juncture could vastly accelerate progress, while missteps could hold a whole people back.

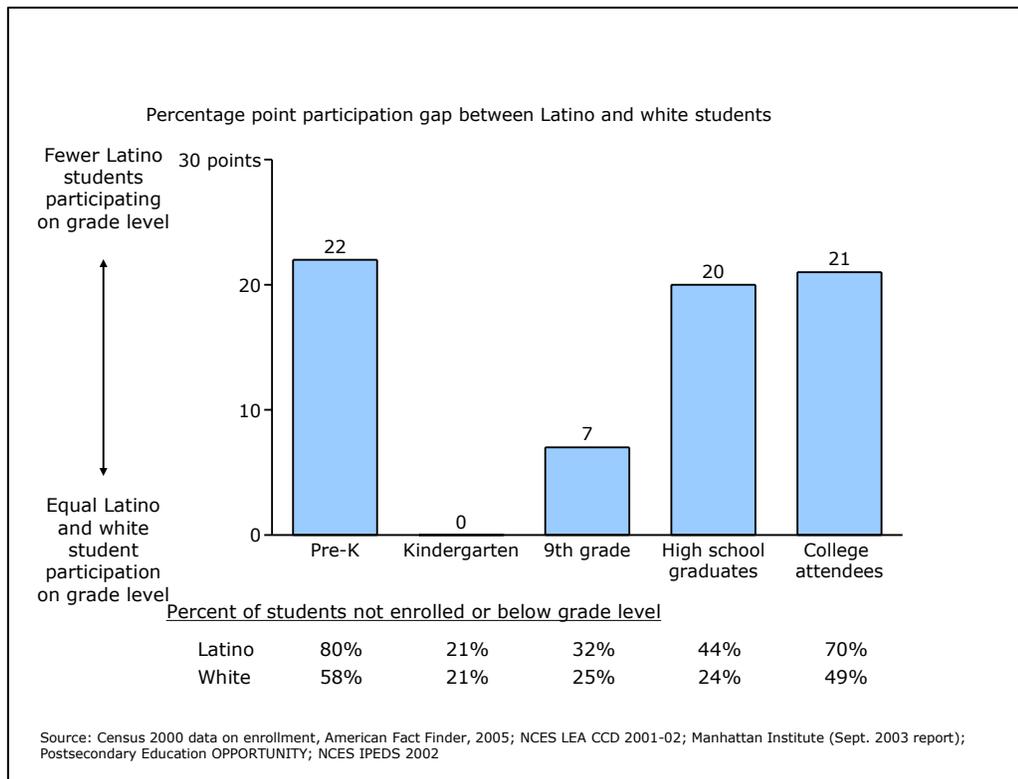
The catch was that the long-term vision, while inspirationally powerful, offered little in the way of a roadmap for near-term action. To direct the efforts of the national office and affiliate base most effectively, they would need to specify NCLR's intended impact—the impact they would hold themselves accountable for achieving within the next years—and its theory of change—how they would bring about those desired results.

To clarify their intended impact, NCLR's leaders translated their vision into a near-term focus on the areas they considered to be crucial indicators of equality of opportunity and conditions: assets and investments, civil rights and immigration, economic mobility, education, and health. Their intense commitment to the goal of Hispanic American equality mandated that within those focal areas they prioritize the dimensions on which the Latino population is furthest behind whites and where the greatest gaps in services or advocacy efforts exist. These two factors, along

with an internal assessment of where NCLR could have the greatest impact given its particular capabilities and history, would serve as the primary criteria for determining where NCLR would get deeply involved over the next few years.

Consider, as an example, the way this approach took shape in one of the five focal areas—education. Applying the three criteria above, the project team identified the age groups, including preschool children ages three to five and secondary school students, where the percentage of Latino youth who were either not enrolled in formal programs or were performing below grade level was at least 20 points higher than that of whites (see Exhibit 1). Research into other youth advocacy organizations working in this realm revealed a striking gap: While a few were focusing on improving educational outcomes for immigrant Latino children, none were advocating effectively for broad-scale reforms targeted to Hispanic English Language Learners, including both native- and foreign-born youth. With extensive experience working on issues related to preschool children and secondary school students, NCLR was well positioned to be a strong voice for these students.

Exhibit 1: Enrollment gaps between Latino and white students by age group



Despite the compelling data, deciding to focus on preschoolers and high-school students was not easy by any stretch of the imagination. NCLR was doing great work for elementary school students and college kids. This decision would mean de-emphasizing that work—those kids—and leaving it in the hands of other capable organizations. But their resolve for deemphasizing elementary school efforts and amplifying preschool efforts was strengthened by a powerful piece of research: A study of test scores in California showed that at least 80 percent of the Latino-white student achievement gap at grade four is present before entry to kindergarten.⁶ If NCLR’s work started at the elementary school level, it would be too late to achieve maximum impact; the kids already would be behind. Similarly, the decision to concentrate on high school rather than college was bolstered by the realization that far too many kids dropped out even before entering college (the majority during their high school years). Given NCLR’s goal of equality, the organization would need to get to these young people before they left the school setting.

Reducing the size of these gaps then became the target metric for focusing activities and measuring the progress of NCLR’s education efforts. For each age group, the team members specified a set of concrete milestones they were willing to hold themselves accountable for hitting. More specifically, they articulated the change they would like to see over the next 10 to 20 years (their intended impact) and the indicators they would work to move over the next five years (their outcome goals). Additionally, they outlined the specific activities and operations they would have to execute over the next two years to put them on track to achieve these goals.

In early childhood, NCLR would focus on increasing the percentage of Latino five year olds who are “school ready” at entry to kindergarten from 50 percent to 66

⁶ Bridges, Fuller, Rumberger, and Tran, “Preschool for California’s Children: Promising Benefits, Unequal Access, PACE Child Development Projects,” UC Language Minority Research Institute, September 2004; National Center for Education Statistics, “NAEP Trends in Academic Progress,” Washington, DC: US Department of Education, August 2000.

percent over the next 10 years. In the secondary school arena, NCLR would work to increase the rate of high school graduation among Hispanic Americans by 10 percentage points over the next 20 years. At the same time, they would work to ensure that graduates met the base No Child Left Behind requirements, so that increases in graduation rates would not be achieved at the expense of lower academic standards. The accompanying two-year and five-year goals served as steppingstones to reach these longer-term impact goals.

Defining NCLR's intended impact was only part of the process. The team also needed to drive to clarity on what it would take to bring about these changes. NCLR's leaders were very clear: both policy and programmatic work would be essential to achieve their objectives going forward. Whereas policy efforts could expand the opportunities open to Hispanic Americans (e.g., removing the social and legal barriers blocking advancement and lining up public monies to fund the implementation and enforcement of these changes), NCLR also needed to build Hispanics' ability to seize these opportunities (e.g., developing and disseminating critical services needed by the Latino community). Better laws and/or more money would make little difference if there were not enough effective programs and culturally competent individuals and institutions to implement and enforce them.

To make this theory of change as powerful as possible, NCLR's policy and programmatic efforts would have to work together closely. Affiliates' programmatic work would contribute to and complement policy wins, resulting in greater gains for the Latino population than if the programmatic and policy work were undertaken by two distinct organizations.

All evidence suggested, though, that such tight coordination of policy and programmatic efforts was not in fact occurring. Opportunities to capitalize on their synergies were being lost. In the 1980s and 1990s, for example, NCLR and others successfully advocated for consent decrees and federal education legislation that brought millions of additional dollars-worth of resources to Spanish-speaking public school students. Nevertheless, student achievement remained flat, in part because there was a dearth of both qualified bilingual teachers and proven models for teaching these English Language Learners effectively. More recently, NCLR was deeply involved in pushing for the inclusion of English Language Learners in all

school-level testing and accountability systems, to help ensure that the system did not ignore the needs of these students. NCLR's education-oriented program work, in contrast, was focused broadly on replicating and scaling small charter schools, rather than specifically on developing proven interventions for English Language Learner students.

How could NCLR get these two streams of activity to work in concert instead of in parallel? And how could it mobilize around the newly-clarified focal areas and near-term impact goals? The most conventional answer to both of these questions would have been to develop a detailed strategy, picking off a few priority issues and describing the specific policy and programmatic initiatives collectively required to make the desired progress. It soon became apparent, however, that this approach was not appropriate for NCLR—for a variety of reasons.

To begin with, although NCLR's leaders had made many choices about the particular Hispanic-white gaps to address, the list of issues contributing to these gaps was quite long. As a civil rights organization working to improve the conditions of an entire community, NCLR was unlikely to improve Hispanic Americans' overall well-being by focusing on a narrow issue, or even a small set of issues within its focal areas. A case in point: ensuring access to higher education for undocumented immigrant children would be necessary but not sufficient to break the poverty cycle if complementary issues (e.g., legal work status, access to student loans) were not addressed. Second, the organization had to remain responsive to a constituency that was constantly evolving with each successive wave of immigration—something that would be hard to do with a highly prescribed strategy. And third, policy work inherently involves opportunism; policy windows open and close at unexpected times and across a range of issues. To be effective in the policy arena, NCLR would have to keep its involvement broad and concentrate on being prepared to push an issue when an opening emerged.

To manage this balance of focus and responsiveness effectively, every part of NCLR would need to be clear about its role and responsibilities. Specifically, the team would need to get crystal clear about the roles affiliates and the national office would play in both the policy and programmatic arenas, starting with the affiliates.

Determining How Affiliates Could Best Contribute

Affiliates were clearly the drivers behind NCLR's program work. They were responsible for developing culturally competent programs and delivering services to the community via skilled bilingual and bicultural staff. The outstanding programs they created and implemented were taken up via policy mandates by both large public systems and other nonprofits to drive positive change among the population. For example, a group of NCLR affiliates developed a now-widespread model for encouraging and supporting first-time Latino homebuyers who are unfamiliar with mainstream financial services.

Affiliates also were contributing to NCLR's policy efforts, but not in a systematic way. Because there was no clear process for involving them in policy work, their efforts translated to largely idiosyncratic contributions. NCLR's leaders believed that going forward affiliates' policy role would need to expand, for three key reasons.

- **The national office's "eyes and ears."** The national office would need affiliates' help if it were to stay up-to-date on the challenges facing the Latino community. Hispanic Americans are a diverse people with diverse needs, with factors such as nation of origin, native vs. foreign born, migratory cohort, and language being major differentiators. With each new wave of immigrants, the mix (and thus the policy needs) shifted. If NCLR were to base its priorities on an outdated sense of the Latino population's needs, it would run a high risk of appearing out of touch and losing the support of its base. But with the bulk of NCLR's staff working at the organization's Washington, DC headquarters, it was nearly impossible for them to keep their fingers on the pulse of what was happening throughout the United States. NCLR needed its web of affiliates to serve as the organization's eyes and ears, keeping the national office continually informed about the real life challenges facing their constituency across the nation. In particular, the affiliates' on-the-ground presence with the most marginalized and dynamic segments of the Hispanic American population could provide the national office with a view into the emerging issues among their most needy constituents.

- **Legitimacy and clout from demonstrated “pull” with Latino voters.** The affiliates could provide the organization with the legitimacy and clout needed to get the ear of elected officials. The best piece of policy analysis in the world would mean little if NCLR were unable to command the attention of key decision-makers. As an organization without individual membership, NCLR needed affiliates to demonstrate their connection to and “pull” with the Latino constituency. The four million recipients of affiliate services were also four million potential voters to the elected officials that the policy staff were engaging.
- **A seat at the state policy table.** Historically the bulk of NCLR’s policy activities had occurred at the national level, given that Washington, DC had been the U.S. hub of social service program design and implementation. The past two decades had seen a shift in power from the federal government to the states, however, thereby increasing the importance of NCLR having a role in state-level politics. This trend was further heightened by the fact that some of the most crucial emerging issues for the Hispanic American community, such as K-12 education, were traditionally the primary province of the states. The leadership team hypothesized that affiliates—especially those that were older and more established—could help NCLR break into the complex and varied landscape of state politics by providing the needed entrée and connection to state decision makers.

The opportunities to involve affiliates increasingly in policy work were clear. Less obvious was affiliates’ desire to do this kind of work. Were there affiliates that were interested in playing a more active role in NCLR’s policy efforts? To find out, the project team designed and fielded a web-based survey to all affiliates. Their answer? A resounding “yes.”

When asked to cite the most important role they played as an affiliate, the most frequent response was to collect data on the needs of the community—one of the three main ways NCLR’s leaders envisioned affiliates taking part in the organization’s policy work (see Exhibit 2). And although very few affiliates cited direct participation in NCLR’s national policy efforts as their most important role,

nearly half relayed that they would be “very willing” to participate in such activities going forward (see Exhibit 3).

Exhibit 2: NCLR affiliates’ perceptions of the roles they currently play

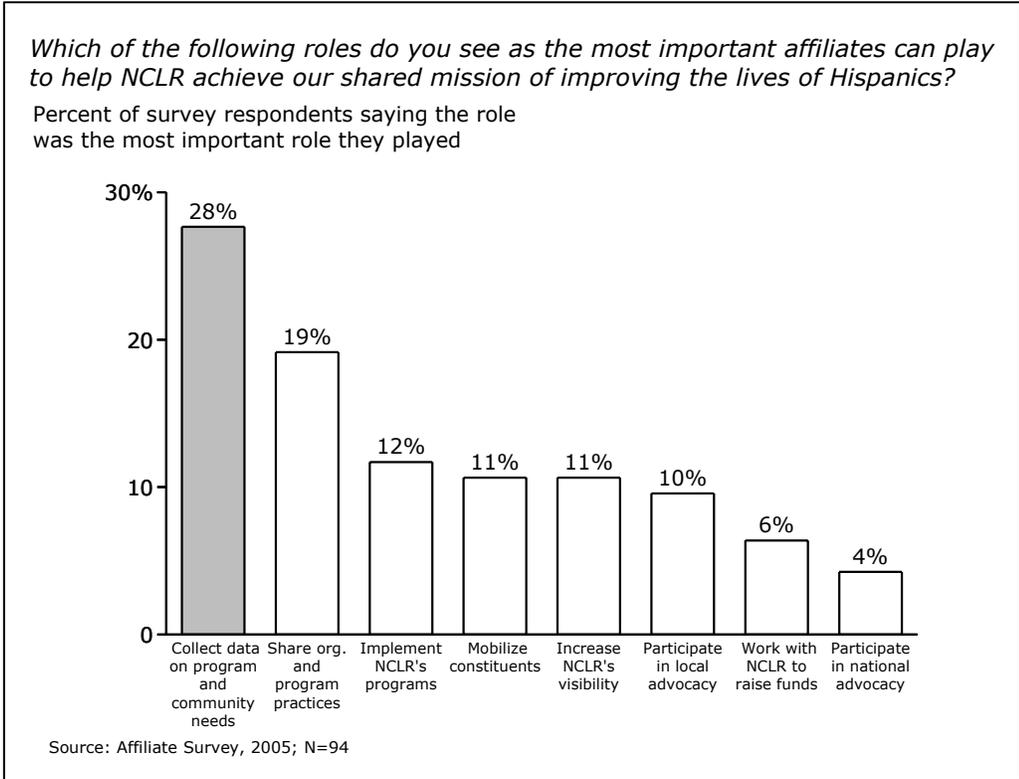
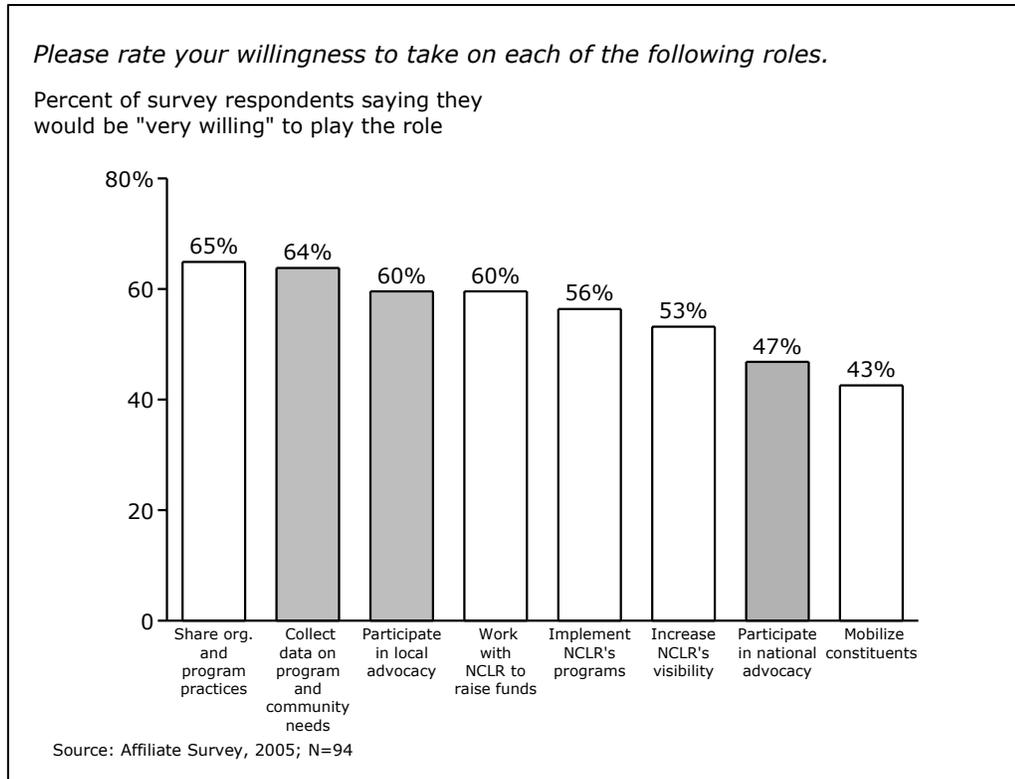


Exhibit 3: NCLR affiliates' willingness to play selected roles going forward



Providing Affiliates with the Support They Need

With affiliates' roles now clearer, what types of support did they need from the national office in order to do this work effectively? Reaching back into the affiliate survey data, the project team learned that the affiliates as a whole were relying on NCLR for its advocacy presence, its power to convene, and its role as an information conduit, keeping them up-to-date on critical policy issues and facilitating the sharing of information amongst affiliates.

But beyond that core, affiliates differed in their needs. Some wanted greater training in advocacy. Others looked to NCLR primarily for technical assistance and financial support (typically in the form of re-granted foundation and public monies) to help develop, implement, codify, and disseminate new program models. It was

looking like a one-size-fits-all approach would not fit the bill—a hypothesis that affiliates’ broad range of ages and budget sizes further supported.

To address both the common and varying needs, the team outlined a two-pronged affiliate membership system. The first would be General Membership. All affiliates would be General Members, and the associated services they received from the national office would be geared around the consensus items from the affiliate survey. Two services that the national office historically made broadly available to its members but that the survey indicated lacked universal appeal—sub-grants and advanced technical assistance— explicitly were not included in the General Membership service package.

In addition to being General Members, selected affiliates would also belong to partner groups designed to meet their specific needs. These groups, described in Exhibit 4, would assume the same responsibilities as General Members plus work with NCLR on a deeper level and hence receive an enhanced service package tailored to that relationship. The project team grouped like affiliates together into four specialized segments: Advocacy Partners; Program Partners; Institutional Partners; and The Next Generation. They specified the “give/get” requirements for each group: what responsibilities affiliates needed to fulfill to be part of the group and what services they would receive from national in return.

Affiliates would either ask to engage with NCLR in a partner capacity or be invited by the national office to do so. The partnerships would not be static. Rather, an affiliate could engage as a Program Partner, for example, on a specific initiative for the duration of the project and then return to General Membership status when the mutual commitment to the initiative was fulfilled. Moreover, Next Generation Partners would become likely candidates for different forms of partnership as the organizations grew and matured.

Exhibit 4: NCLR affiliate groups

Services NCLR will provide its affiliates			
General members			
<i>All NCLR affiliates – Latino community-based organizations that support NCLR’s mission</i>			
<ul style="list-style-type: none"> • Permission to use NCLR’s name and publicize affiliation with NCLR for promotional purposes; access to a letter of support for fundraising purposes • Professional development and networking opportunities, including consideration for: NCLR Board of Directors and Affiliate Council representation; participation in peer-to-peer best practice sharing sessions; and deeper partnership opportunities • Benefits at events and functions, such as reduced rates for NCLR’s annual conference and access to specialized training tracks and seminars offered at the conference • Access to special information, communications, materials, and services • Priority consideration for funding opportunities 			
Advocacy partners	Program partners	Institutional partners	Next generation partners
<i>Affiliates that are highly involved in joint efforts with NCLR to change policy at the national, state, and/or local level</i>	<i>Affiliates that are highly engaged with developing and implementing programs aligned with NCLR’s priority areas</i>	<i>High-profile, community-focused, influential organizations whose history, commitment, loyalty, and effectiveness make them valuable partners</i>	<i>Young, innovative affiliates who are working with emerging communities and/or addressing new, cutting-edge issues</i>
<ul style="list-style-type: none"> • In-depth advocacy training • Strategic policy advice and assistance with message development • Opportunities to affect and contribute to national debates • Access to advocacy tools developed by NCLR • Eligibility for NCLR advocacy sub-grants 	<ul style="list-style-type: none"> • Materials and technical support to implement NCLR programs • Program promotion nationally or regionally • Support for program documentation and funding to train other affiliates • Data systems and training to track outcomes • Knowledge sharing forums • Eligibility for NCLR program sub-grants 	<ul style="list-style-type: none"> • Connections to NCLR’s key relationships with corporations, government, and the media • Invitations to selective NCLR sponsored and co-branded events • Promotion in NCLR’s materials and activities • Eligibility for NCLR sub-grants 	<ul style="list-style-type: none"> • One on-site technical assistance session with NCLR staff • Targeted assistance with organizational and infrastructure issues • Priority consideration for subsidies to participate in regional caucuses, national advocacy day, and the national conference • Eligibility for NCLR sub-grants

To help ensure that the partnerships would be productive, the project team developed an annual recertification process that would both assess affiliates’ level of satisfaction with the national office’s services and ensure that the affiliates were meeting their requirements. NCLR would work to address any sources of dissatisfaction surfaced during the review. If an affiliate were not fulfilling its obligations as a partner, NCLR and the affiliate would develop a plan for getting the partnership on track. If the requirements still were not met by the next review, NCLR would withdraw the services associated with that partnership, and the affiliate would return to General Membership status.

Making Change and Moving Forward

NCLR has made great strides in the months since the planning process ended. Driven by her conviction that the plan can increase NCLR's impact dramatically, Murguía has made its implementation one of her top three priorities.

The organization has begun establishing effective partnerships with a larger, more diverse, and more involved affiliate network responsive to the changing Hispanic demographics, starting with the re-enrollment of NCLR's existing affiliates as General Members. An NCLR working team delineated in a memorandum of understanding (MOU) the General Members' service package and their reciprocal responsibility to NCLR. Every affiliate interested in continuing its involvement with NCLR will sign this MOU. Simultaneous with the General Membership work, the working team flagged affiliates to target for membership in the partnership categories. A cross-functional team of policy, program, and affiliate staff worked with Murguía to create Partnership Amendments for each category and is beginning to work one-on-one with the targeted affiliates to enroll them.

NCLR's enhanced service offerings carry with them greater costs. In an effort to cover a portion of these costs, the organization has begun a process to increase annual affiliate fees. Murguía described the higher fees during a recent nationwide affiliate listening tour. The affiliates' response was largely positive, with several mentioning that they received more from NCLR than from their affiliation with any other national organization—many of which charge much higher membership fees.

NCLR has made key organizational and people investments to help deliver on the plan. The role of Affiliate Member Services has been elevated, with one of NCLR's top senior leaders now heading that area. The organization also has made hires to support its heightened emphasis on the integration and alignment of its program and policy activities. In the education program area, for example, a top national expert in bilingual education has joined the team to help use NCLR's charter school network to develop and evaluate interventions for English Language Learner students. In the policy arena, the search is underway for a senior resource

to help align the organization's children-focused advocacy work to complement its broad range of Latino youth programmatic work.

Murguía and her leadership team have been working diligently to line up outside funds to support the plan. They currently are working to raise corporate and local foundation funds in California to support state operations that include a core team of program and policy staff aligned with the plan and prepared to implement the strategy. In addition, NCLR recently received a \$2.5 million grant from The Atlantic Philanthropies to establish a new children's advocacy program.

Murguía recognizes that much work lies ahead to implement the plan fully. At the same time, she also sees clearly how having a mobilized and involved affiliate base has the potential to vastly increase NCLR's ability to improve the conditions of Hispanics in America. "If we succeed at implementing this plan," reflected Murguía, "we will have a platform to take best practices, model programs to scale, and we will have a way to complement our work in Washington by getting the state and regional support we truly need to make progress on the policy front."

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