

CASE STUDY: JOBS WITH JUSTICE

“A leadership transition can be an opportunity for organizational reflection and for an organizational transition that promotes renewal and growth”

— Sarita Gupta, Executive Director, Jobs With Justice

Budget

\$ 94,360 consultant hours

\$ 24, 364 travel & expenses

\$118,724 Total

Duration of Consultancy

Four years (three separate MAP engagements)

- **Finances Project One:** Performed financial assessment of three local coalitions, each of which representing a different type of local affiliate. Developed financial literacy and training for the variety of types of organizations that comprise the network. Created financial check lists and templates. Equipped national field organizers to support coalitions in developing sound financial management systems.
- **Finances Project Two:** Performed a financial assessment of nine more local coalitions. Designed and implemented a *Fun with Financials* train-the-trainer curricula. Created a financial operations manual. Provided training for staff and leaders.
- **Visioning and Strategic Planning Project Three:** Developed a 3 year strategic plan contextualized in a 20 year vision.

Work Accomplished

- Updated the network’s vision, mission and theory of change.
- Created a *State of the Network* report.
- Established a 3 year strategic plan, contextualized within a twenty year vision.
- Developed more alignment among the network’s national headquarters and member coalitions.
- Identified financial management skills needed by national staff to support local coalitions and implemented a train-the-trainer curricula throughout the network.
- Created a *Fun with Financials* manual including templates and checklists.
- Conducted financial assessments and improved financial management practices of 20 local JwJ coalitions.
- Developed a short term plan to strengthen individual donor development

ABOUT FACT: The French American Charitable Trust (FACT) was created in 1989 by a French-American family to address fundamental inequalities and injustice in our society. FACT has an annual grantmaking budget of \$4.2 million and an endowment of \$25 million. We support nonprofit organizations in the United States and in France working on root causes of poverty and inequality with an emphasis on the active participation of the grassroots—the people who are directly affected. We have a broad program area: social, economic and environmental justice. To learn more please visit www.factservices.org

The Need

In 2009, the Jobs with Justice Education Fund (JwJ) national network had 40 local coalitions across the country each comprised of labor, community, student and faith-based groups working to win workers' rights and economic justice.



The national office sets national campaign priorities and provides field organizers to support local coalitions in achieving their programmatic and organizational development goals. Local coalitions are autonomous and self-sustaining. JwJ is a multi-layered organization governed by a national board with national and local staff, leaders and member organizations. **At times, the network experiences tension between its parts, especially between national priorities and local needs.**

JwJ was founded in 1987 in a different political context. Ronald Reagan was President, the leadership of the AFL-CIO was more conservative and it was uncommon for labor to reach out to local community, faith or student groups. Today, there is a U.S. President whose door is open to labor, there is a split within organized labor between the AFL-CIO and Change to Win, and the model of labor-community coalitions has caught on outside of the JwJ network. Moreover, the founders of JwJ hold positions of power in both arms of the organized labor movement. **Given these big shifts in the landscape, it was important for JwJ to reconsider its vision and reposition itself through strategic planning.**

JwJ started its first of three MAP engagements in 2005. At the time, it had 23 local coalitions, each with two to ten paid staff and budgets that ranged from \$50,000 to \$500,000. A total of fifty paid staff led the local coalitions with the support of four national field organizers and a national staff of eleven.

Local chapters confronted many of the same questions in managing and sustaining themselves. The national office regularly received calls from locals experiencing financial crises that stemmed from inexperience with financial management practices. For example, local groups lacking adequate systems to monitor cash flow might realize belatedly that they would have difficulty meeting payroll. Although national field organizers were skilled in providing programmatic support like mapping power and identifying strategic campaign targets, they were less skilled in financial management. JwJ knew it needed to support its local groups in developing financial management expertise and ensuring that these skills would be transferred to new staff members and coalitions. JwJ believes that having the ability to provide this kind of support is critical to building the internal infrastructure necessary to succeed in its external goals.

JwJ's Founding Director's planned transition out of the organization happened more quickly than expected at the outset of the first MAP project. The incoming Executive Director (ED) felt she would need coaching and support as she took on responsibility for the finances of the organization. The MAP financial management projects enabled the new ED and the local coalitions to gain skill and confidence at the same time.

Upon completion of two consecutive MAP projects on finances, JwJ engaged MAP a third time to support its strategic planning, which helped the network acquire a shared understanding of national and local priorities and established the foundation for a new phase of growth. **At the time of the third MAP engagement, dialog between the network's component parts was needed to move beyond historic tensions and to ensure that all stakeholders were confident that the network operates in the greater interest of the whole, even when a particular national campaign doesn't directly or immediately serve the interests of some.**

Consultants Utilized

Carol Cantwell works with nonprofits and foundations to help them understand the role and power dynamics of money in organizations. Carol brings over 15 years of nonprofit financial experience and a degree in economics to her skill-based trainings, along with her sense of humor and ability to make financials fun!

Kim Gilliam leads fundraising operations and trains and coaches others in the field. He specializes in raising major gifts from individuals for social justice and environmental causes.

Mary Ochs strengthens community organizing groups and networks with customized organizational development support and by mentoring organizers. Mary brings over 35 years of experience as a community organizer and founder/executive director of numerous grassroots organizations.



Developing the Workplan

The MAP financial management project started with an assessment of the financial management systems of three different types of local coalitions. The consultant created an ongoing train-the-trainer *Fun with Financials* workshop series. In addition, the consultant partnered with national field organizers to survey training participants, provide follow-up support and identify best practices. During the second MAP project, the financial practices of nine local coalitions were analyzed.

With regard to planning, JwJ had an annual practice of short term planning. But, it needed a long term vision to determine where JwJ was headed in twenty years and to articulate the network's particular role in the broader movement for social change. In order to succeed, the MAP visioning and strategic planning project involved all layers of the network, including the national board, national and chapter staff and leaders as well as allies in a dialog that resulted in broad consensus. Here's how it worked:

With support from the MAP consultant, the Executive Director and the Field Director met face-to-face with the staff and leaders of every local coalition to understand different stakeholders' perspectives regarding JwJ's purpose, goals and objectives, opportunities and challenges, and approaches to the work. In the past, the network worked around different points of view without confronting or benefitting from the variety of ideas. The MAP consultant led similar meetings with allies to glean their perspective on JwJ's purpose.

Workgroups, including a representative cross section of board members, national and local staff or members, then tackled areas of tension or uncertainty. Three workgroups met weekly for up to eight weeks, with the ED and the MAP consultant, to discuss:

- where JwJ fits in the labor and global justice movements;
- how to carry out national campaigns and respect local autonomy; and
- governance and growth, in the context of learning lessons from other networks.

Next, the workgroups and the national board engaged in a facilitated dialog that was both constructive and contentious to develop a set of common understandings. Each workgroup then created a set of proposals which were distributed with guiding questions to the network's coalition members. A national gathering facilitated by the MAP consultant and members of the national Board allowed for respectful debate. Ultimately, every coalition committed to the plan and came away with a sense of its responsibility to the other local coalitions for its fulfillment. The MAP consultant helped think through the action steps needed to implement the strategic plan.

Challenges

A national staff position turned over early in the first financial training project, creating a moment of opportunity that impacted the network's approach. Realizing that when one staff person could train another the knowledge was deeply rooted, the network adopted a train-the-trainer model. Utilizing this model slowed the pace of the knowledge and skills transfer, but it also ensured that the expertise continued to be embedded within the network despite staff turnover.

As a network, JwJ believes that strong community leadership is as important as good staff. At first it seemed daunting to involve volunteer leaders in training on financial management. However, as a result of the Fun with Financials process, the majority of coalitions were surprisingly successful in finding volunteer leaders willing to act as treasurers and train the rest of their team.

Creating an inclusive visioning and planning process that maintained the autonomy of the chapters required patience and time to allow for dialog back and forth between all layers of the organization.

Constructively navigating the network's historic tension points required the skilled facilitation of a consultant who was respected in the field and had the ability to win the confidence of the key labor, community and faith sectors that comprise JwJ.

At times, the interests of national stakeholders and local coalition members differed. Success required that all parties closely listen to each other and determine jointly how to work together in the best interest of the entire network, even when the common interest required compromise regarding the immediate priorities of some stakeholders.

Outcome Highlights

1. Engaging in a visioning and planning process at the outset of the new Director's tenure helped stakeholders to see the new ED (who was promoted from within the national staff) in her new role and provided a sense of ownership of the outcome by all involved.
2. Understanding the viewpoints of all local coalition members informed and will continue to inform the leadership of the new ED.
3. Documenting itself through an electronic self assessment completed by local chapters and compiled into a "state of the network report" helped all the component parts of the JwJ understand the whole. It provided the basis for a deep evaluation of the strengths and challenges of the network. Self assessment is now an ongoing practice.
4. Articulating the principles and values of the network in language that resonates with rank and file workers ensured that the work of JwJ speaks to its constituents.
5. Creating a toolkit and set of templates to help local affiliates understand and manage their finances served as a useful everyday reference and fostered the development of a network of sustainable local coalitions.
6. Establishing a culture of sustainable finances across the JwJ network alleviated financial crises at the local affiliate level, making the local affiliates stronger.
7. Discovering how easy financial statements, balance sheets, and other accounting concepts are to understand empowered both local and national staff and leaders.
8. Funding network priorities partially by chapter dues ensures that all involved have an ownership stake. As a result of the visioning and planning process, local chapters voted to pay dues to fund national campaigns and internal capacity-building initiatives. A leadership development program that includes political analysis and skills building was among the first national priorities funded by the chapters.
9. Knitting local coalitions more tightly through mentoring relationships on financial practices and literacy was a surprise outcome.
10. Developing relationships horizontally across the network through the inclusive planning process resulted in more alignment than seemed possible at first and helped to surface new ideas.

Next Steps

The organization continues its “Fun with Financials” trainings at the national and regional level.

JwJ found the expertise of the financial management consultant so important that it budgets for quarterly check-ins on an ongoing basis.

The network will implement its detailed strategic action plan, which includes:

- Phasing in a charter renewal process to encourage coalitions to set more ambitious goals and engage in the network more deeply;
- Building JwJ coalitions in regions of strategic importance and exploring statewide growth;
- Prioritizing the development of a comprehensive communications strategy; and
- Increasing its grassroots fundraising capacity.

Local coalitions will work on local struggles for workers rights, while participating actively in national priority campaigns. The balance between national and local priorities will continue to be explored.

Lessons Learned for Capacity Building Funders & Consultants

1. Clarifying at the outset the scope of the project, the division of responsibilities and the expected time commitment created the foundation for a successful engagement.
2. In-person meetings between key stakeholders and the consultant(s) at the beginning of the project fostered the essential chemistry necessary for success.
3. Establishing mutually acceptable processes for real time feedback between the consultant and organization ensured a mechanism for any necessary adjustments to keep the project on track and for goals to be achieved.
4. Embedding skills and training within the organization kept the organization from becoming overly reliant on expensive consultant support and ensured that the experience remains alive within the organization regardless of staff turnover.
5. The inclusive planning process strengthened the commitment and buy-in of all stakeholders.