

**COMMUNITY**



**ORGANIZING**

**TOOLBOX**

**Two In-Depth Case Studies**

## TWO IN-DEPTH CASE STUDIES

### INTRODUCTION

Over the past decade, CO's growing strength, sophistication and impact has attracted new interest and attention among grantmakers. This section describes how two foundations — one national, one local — made major commitments to CO.

Use their experiences to explore how CO strategies fit within and support your broader funding goals and objectives (a series of mini-case studies are sprinkled throughout the *Toolbox* to emphasize and illustrate key points made in the text).

These in-depth case studies were developed through on-site and telephone interviews with key foundation staff and trustees. In one, interviews were also conducted with selected grantees. Both draw extensively on public and internal documents such as annual reports, grantmaking guidelines, staff memos and positions papers.

The foundations studied are:

- **The Charles Stewart Mott Foundation**, a large national foundation with more than \$2.4 billion in assets in 1998 and grant allocations of \$88.2 million the same year. The foundation has domestic and international funding interests that include civil society, the environment, community education, and economic opportunity and development.
- **The Hyams Foundation, Inc.**, a private family foundation, funding in the greater Boston area with assets totaling \$160.6 billion in 2000 and grant allocations of \$4.4 million in 1999.

While each differs in size, style and approach, they share a number of common practices and themes.

- **Strong Institutional Commitments to CO Funding.** Each has made a deep and profound commitment to CO. Both launched a highly interactive and strategic planning process to develop a new mission statement and set of program priorities. The results were a clear institutional commitment to CO as a primary strategy to advance broader foundation objectives.
- **Dedicated Staff with CO Knowledge and Background.** Both hired staff with broad CO knowledge and experience to develop new grantmaking programs and priorities. These staff members actively sought to increase internal understanding and support of CO by synthesizing the research, convening formal and informal meetings, writing position papers, and bringing in the voices and experience of CO practitioners and technical assistance providers.
- **Pragmatic but Persistent Efforts.** In developing a CO grantmaking portfolio, staff members placed CO firmly within the foundation's own funding traditions and institutional

context. Pragmatic but persistent efforts were made to relate CO to previous grantmaking initiatives, often by explaining concretely how organizing strategies helped the foundation to build on past efforts, extend its impact, and embody its institutional values.

- **Continuous Staff Dialogue and Board-Staff Interaction.** Team-building, first at the staff and then at the trustee level, was critical in developing a broad-based consensus on the role and importance of CO for advancing the foundation's broader institutional goals and objectives. Critical opportunities were identified for staff and trustee site visits. There, they continued to learn about the local, state and national CO work and the impact of CO groups and networks. Discussion often focused on the simple justice inherent in organizing marginalized constituencies to gain their rightful place at public and private negotiating tables.
- **Attention to Broader Trends and Contexts.** Broader social, political and economic trends were identified and used to bolster arguments in favor of CO. For example, devolutionary trends that shifted decision-making power and authority from the federal to state governments was used as an opportunity to bring underrepresented constituencies to state and local negotiating tables, and even to coalesce groups around new national objectives.
- **Commitment to Program Review and Impact Evaluations.** CO impacts are documented by incorporating evaluation into grantmaking programs. At the Charles Stewart Mott Foundation, staff have awarded grants to assist CO groups to assess the quality and impact of their own organizing efforts. The Foundation developed general and specific benchmarks by which to gauge progress in building national CO infrastructure. The Hyams Foundation also took seriously the need to assess progress, document impact, and distill lessons from its multi-year efforts supporting CO. It commissioned an independent evaluation of its first major CO funding initiative, which helped staff and trustees to distill and apply lessons learned to other areas of its grantmaking activity.

## IN-DEPTH CASE STUDY #1

### The Charles Stewart Mott Foundation

<b>Type:</b>	Independent
<b>Location:</b>	Flint, Michigan
<b>Assets:</b>	\$3.22 billion (12/31/99)
<b>Major Program Categories:</b>	Civil Society, Environment, Flint Area, Pathways Out of Poverty
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## INTRODUCTION

When the Charles Stewart Mott Foundation began devising new funding mechanisms to support grassroots groups in the mid-1970s, support of CO in the foundation community was in its infancy. Much has changed since then, both in the field and among individual funders. The Mott Foundation has today become the first major national funder to establish a grantmaking program whose aim is to build the power and capacity of the CO field. That program — Building Organized Communities (BOC) — is part of a new, six-year plan for its Pathways Out of Poverty program that Mott trustees unanimously adopted in September 1999.

That plan is Mott's blueprint for funding one of its four major programs through 2005. Its mission is to *identify, test and help sustain pathways out of poverty for low-income people and communities*. Toward that end, the Foundation plans to give \$240 million over the next six years to nurture systemic change in the educational, economic and community dynamics that have produced and perpetuated poverty in the United States. Of that amount, the Foundation anticipates investing at least \$5.5 million per year to build CO infrastructure nationally and to support issue organizing at statewide and regional levels.

How did Mott's interests develop over the last 25 years from its earliest exploratory interests to the crucial role that CO plays in advancing the Foundation's anti-poverty objectives? This case study examines that history, highlighting key developments in its support of CO as an essential ingredient in its fight for a more just, equitable and sustainable society.

## PIONEERING A NATIONAL STRATEGY FOR GRASSROOTS FUNDING

In many respects, the key to understanding the Mott Foundation's evolution lies in its principled and long-standing commitment to community. That commitment stretches back to C. S. Mott himself, who asserted that "every person, always, is in a kind of informal partnership with his community." Foundation President William S. White elaborated on this theme in *Neighborhood Organizing: Nurturing Strong United Voices*, a special section of the Foundation's 1984 annual report. White described the Foundation's "fundamental belief that our nation's greatest resource is the determination, experience, knowledge and unlimited potential of its citizens," and stressed the vital role that neighborhood-based organizations play in engaging and involving low-income people in the issues that affect their communities. "The Mott Foundation designed its neighborhood program with citizen involvement in mind," White wrote.

This commitment led the Foundation in the mid-1970s to pioneer the development of a national strategy for grassroots funding. While the strategy was not then based on CO principles, it did establish Mott as the first national foundation committed to using its resources

to help nascent neighborhood groups grow into viable community development organizations.

Mott launched its first such effort — Stimulating Neighborhood Action Program (SNAP) — in the 1970s. SNAP funded a network of organizations to provide small grants to community school councils involved in activities ranging from neighborhood newsletters to youth employment programs. After several years, it became clear that both seed money and technical assistance were needed to help stabilize and grow neighborhood organizations capable of taking on complex issues, and that a large national funder like Mott could not effectively manage a small grants program alone. This realization was reinforced when President White, asked the Center for Community Change (CCC) to assess the status of community building in Flint, Michigan, Mott's hometown. The Center issued a bleak report noting little or no positive community action and declaring the Foundation an obstacle to it. CCC recommended a program that would provide seed money and ongoing technical assistance to fledgling groups working in low-income communities around the country.

Mott's creative response was to launch the Intermediary Support Organization (ISO) program in 1979. Originally designed as a five-year national funding effort, the program is now in its 22nd year. The Foundation operates the program by distributing an annual grant of approximately \$300,000 to each of six Intermediary Support Organizations (ISOs). These ISOs then identify emerging groups in their catchment areas and provide them with small grants and technical support to help them grow financially and organizationally. Mott sets the program's basic parameters — each ISO must make annual grants of up to \$15,000 to a dozen or so groups — and then leaves the ISOs alone to select grantees and run their own technical assistance programs. Since the program's inception, Mott has invested some \$16 million in more than 1,000 neighborhood groups nationwide.

## **FROM COMMUNITY IMPROVEMENT TO ANTI-POVERTY**

Mott's success with the ISO program gradually led to new CO funding opportunities, according to Jack Litzenberg, who was involved with the ISO program in the 1980s. Larger economic and policy trends — including growing poverty and federal budget cuts — underscored the need for community action. As the ISO program evolved, it began to fund an increasing number of groups to organize low-income residents so that they would have a voice in the decisions that shaped their communities and their lives. In Wichita, Kansas, for example, Sunflower Community Action grew from a dozen low-income residents into an activist organization with more than 1,400 members in 35 neighborhoods. In Southern California, Concerned Citizens of South Central L.A. emerged as a major urban force with a \$7 million budget from its roots as a struggling coalition of three block clubs. And in Providence, Rhode Island, Direct Action for Rights and Equality (DARE), grew from its start as an economic justice campaign located in one neighborhood into a major institution now organizing childcare workers statewide.

Mott funded several independent assessments of the program — two by the Center for Community Change in Washington, D.C. and three by the Oakland, California-based Applied Research Center. All of the studies were supportive of the ISO program, including its evolving role in stimulating the growth of the CO field. These assessments would later be important, as Mott staff began to develop a strategy for building a stronger bridge between the CO field and the Foundation's 25 years of support for grassroots organizations.

In the late 1980s, almost a decade after the ISO program had begun, Mott President White initiated a strategic planning process that would set the stage for expanded CO funding efforts in 1999. Between 1988 and 1990, the Foundation worked with a consultant to identify the biggest issues then facing the nation and the world, and to develop grantmaking strategies to address them. Trustees were interviewed for their views on the country's most critical public needs, and staff members were asked to submit their written thoughts on the issues they thought the Foundation should most address. Six big issues emerged, with persistent poverty and education topping the list.

This planning process led the Foundation to emphasize poverty alleviation over community development. Litzenberg explained the significance of this shift: "In moving from community development to poverty alleviation as a funding orientation, we began to think more seriously about the need for poor people to have a voice in their own futures. It began to be our view that we needed to address one of the basic problems in low-income communities, which is that poor people are alienated from power." The Foundation's new poverty grantmaking guidelines explicitly included CO and grassroots leadership development as funded activities.

## **RATCHETING UP FOUNDATION SUPPORT FOR CO**

It was in the late 1990s that the Mott Foundation made CO one of three strategies for poverty reduction. Its decision to do so reflected a two-year strategic planning process that Mott's poverty team initiated in 1997. Ron White, who joined the team as a program officer in 1997, played a key role in ratcheting up the Foundation's support for organizing. Hired specifically for his knowledge of the CO field, Ron White saw an opportunity to expand Mott's support of CO by building on the ISO program.

Planning efforts got underway formally in the fall of 1997, when the Foundation's poverty team traveled to New York City to discuss future anti-poverty grantmaking strategies with Mott trustees. Staff and trustees also made joint site visits to see the work of New York City-based CO grantees. Returning to Flint, the team planned eight staff learning sessions on topics from an overview of poverty in the United States, to the impact of public policies on low-income communities and grassroots organizing approaches to community change.

The first of two learning sessions on CO included a video case study examining how CO helped to rebuild Boston's Dudley Street neighborhood, followed by a discussion of the role

that CO plays in resident-led community renewal efforts. In the second staff learning day, Mott's team invited CO practitioners, technical assistance providers and funders to present their perspectives on the history, methods, strengths and weaknesses of the CO field. For both discussions, Ron White developed a briefing binder with selected readings on CO history, organizing models and policy impacts in the areas of Foundation concern. Readings included overviews of the CO field, work by the Industrial Areas Foundation's (IAF) Ernie Cortes on CO and social capital, and case studies of effective CO campaigns addressing such key issues as deindustrialization and education reform.

One month later, Maureen Smyth, Mott's vice president for programs, and three members of the poverty team traveled to South Texas to view first-hand the work of local IAF affiliates. The team met with IAF organizers and community leaders over several days in San Antonio, Brownsville and Austin. This trip not only laid a sound basis for further planning, but also led to a \$1 million grant — later increased to \$3 million over three years — to IAF's Texas Interfaith Education Fund to expand its organizing, leadership development, research and evaluation activities in 13 communities in five states. The grant, intended to build the IAF's general organizing capacity for education, economic opportunity and civic engagement, represented the cross-program efforts of Mott's entire poverty team.

Smyth noted the importance of the trip:

*When we went down to see the IAF in Texas, you couldn't help but be impressed by the work they are doing. It became obvious that, whether you were talking about better schools, quality after school programs, or job creation, CO was producing many of the programs and outcomes that we cared about.*

Building on the excitement generated by the Texas trip, Ron White then developed two internal memos that presented a rationale for funding CO at higher levels, highlighted new funding opportunities within the field, and recommended grants to major organizing groups, networks, and projects.

The first memo argued for direct funding of the major CO networks, describing them as “the next step in the structural evolution of grassroots civic involvement.” Noting that “Mott had demonstrated the foresight to establish its ISO program long before others in the field recognized the necessity,” the memo argued that the Foundation was “now in a position to be a leader in establishing support directly to organizing networks which have, as their primary task, the building and sustaining of highly effective and tested organizations in low-income communities all across the country.”

In making this case, White discussed the added value that he thought the CO networks would bring to Mott's long-term effort to build strong and effective grassroots community organizations through the ISO program. First, he noted that, unlike the intermediaries whose focus and expertise lies in helping new groups form, the CO networks continue their

relationship with local groups for years, and often for decades. Second, the networks' primary aim is to build strong, multi-issue organizations through the continuous development and mentoring of new leaders. Third, the networks usually teach a specific model of organizing, one that they have worked on and refined for years. And fourth, the networks charge dues to affiliates for their training and technical assistance, creating economies of scale while also ensuring their accountability and responsiveness to local needs. The memo also noted the CO networks' unique ability to link their affiliates together across states and communities to enable low-income constituencies to be heard on policy issues that transcend neighborhood boundaries.

The second memo proposed that the Foundation strengthen issue organizing at statewide and regional levels, with a particular focus on improving education and increasing economic opportunities in low-income communities. White reasoned that larger developments — the elimination of cash assistance to the poor as a federal entitlement and the devolution of power and authority from the federal government to the states — made it increasingly necessary for local groups to come together at state and regional levels to help shape public policy debates on issues of local concern. He proposed that Mott fund new regional or national structures or projects that could link and support low-income constituencies to address problems that are experienced locally but created externally.

Having laid out a rationale for a two-pronged funding strategy, White then recommended that Mott provide direct support to four major organizing networks and award grants to a half dozen or so groups working to develop regional and national policy campaigns.

## **BUILDING ORGANIZED COMMUNITIES**

*This is a very important moment in the field of community organizing. The capacity and sophistication of organizing networks has increased so dramatically. This fact, combined with the new awareness that all of the interest groups in the world will not have any major impact without constituency, has created great new organizing opportunities. I've always felt that if more money could go into the field, dramatic things could happen.*

— Ron White, Program Officer, Pathways Out of Poverty

Mott's BOC program area today seeks to strengthen and sustain the involvement of low-income communities in policymaking arenas by enhancing the variety, geographic reach, influence and effectiveness of the CO field.

BOC's two program components include:

- **Building infrastructure** to improve the quality of CO in low-income communities by increasing resources to institutions, organizations, technical assistance providers and networks that produce, nurture or expand community-based organizations, or increase awareness of their effectiveness as an anti-poverty strategy nationally; and
- **Issue organizing** to strengthen the organizing infrastructure of state and regional issue collaborations that focus on improving education or increasing economic opportunity in low-income communities.

To achieve these objectives, Mott program staff are particularly interested in building the organizational capacity, financial stability and policy impacts of the major CO networks — especially those with an articulated social analysis of how to build power in low-income communities, an established CO method, and a significant geographic spread. Other infrastructure-building goals include increasing CO's influence and visibility by encouraging more relevant research, effective communications and the development of new philanthropic resources for CO.

Finally, BOC's resources are also targeted on projects that convene, network or link grassroots groups with grantees under the Mott-funded State Fiscal Analysis Initiative, a jointly funded program with the Ford Foundation and the Open Society Institute to increase the capacity of nonprofit groups to analyze the effects of state fiscal and tax policy decisions on low-income constituencies.

Since Mott trustees formally approved the Pathways Out of Poverty plan, the Foundation has invested millions of dollars to support CO nationwide, with sizable grants awarded in 1999 to almost all of the major organizing networks, including Direct Action and Research Training (DART), the IAF, Pacific Institute for Community Organizing (PICO) and the Gamaliel Foundation. Mott has also invested substantial grant resources to support the development of regional issue campaigns.

## SELECTED GRANTEES

### Infrastructure Building Grants

- Texas Industrial Areas Foundation (TIAF)/Texas Interfaith Education Fund. Received \$3 million to support TIAF's work in 13 Southwestern communities over three years, including organizing efforts to increase access to good jobs, improve educational outcomes for poor children, and rebuild citizen engagement through organizer trainings and leadership development activities.
- Pacific Institute for Community Organizing (PICO). Received \$600,000 to support issue development, organizational development, staff training, fundraising, and planning and management.
- The Gamaliel Foundation. Received \$240,000 to help create and nurture new statewide, regional and national campaigns; to expand capacity to provide leadership training, staff recruitment and mentoring, issue research and consultation; and to hire new staff to assist in campaign expansion and leadership development.
- Direct Action and Research Training Center (DART). Received \$300,000 to assist the network in building new state and regional organizations and developing DART's issue campaigns around public education, employment, banking policies and health care.

### Regional and National Issue Organizing

- Partnership in Action for Authentic Community Development, Oxfam America's U.S. Program. Received \$500,000 to support Oxfam's efforts to increase capacity and collaborative effort among its 32 partner organizations in the Southeast. Through the Partnership in Action, Oxfam will expand its leadership training and focus on increasing regional issue analysis, organizing and coordinated policy advocacy.
- 9 to 5, National Association of Working Women. Received \$100,000 to support 9 to 5's Midwest campaign to improve job conditions for the working poor. The campaign is conducting research on contingent and part-time work in two Midwestern cities, training leaders to develop and implement local and regional organizing campaigns, and developing policy solutions to improve the more egregious workplace conditions and abuses.
- Northwest Federation of Community Organizations. Received \$156,080 to support the Federation's ability to conduct issue research, recruit and train leaders, and develop multi-state organizing campaigns on issues of concern to the region's most economically disenfranchised residents.

## EXPANDING ECONOMIC OPPORTUNITY AND IMPROVING COMMUNITY EDUCATION: CROSS-PROGRAM PERSPECTIVES ON THE ROLE OF CO

*Community organizing is foundational. You can't do effective community development without it. Our plan at Mott is built around the idea that you have to organize communities around economic or educational equity agendas. It is ludicrous to think that you'll get good outcomes without an organized community.*

— Jack Litzenberg, Senior Program Officer, Pathways Out of Poverty

The planning process that led to the development of BOC also generated significant new thinking among Pathways Out of Poverty program staff members who are involved in other areas of Mott's anti-poverty work. Increasingly, poverty program staff members are working together to recommend large, multi-year grants to CO networks or groups that address education and economic security issues through CO, leadership training, coalition-building and policy reform activities.

One good example of such integrated grantmaking is a \$3 million grant that Mott made to the IAF in 1998 to expand its organizing, leadership development, research and evaluation activities in 13 Southwestern communities. The Pathways Out of Poverty program staff worked collaboratively to support the IAF's work, with budgets from Mott's Improving Community Education, Expanding Economic Opportunity and Building Organized Communities components each contributing one-third of the total grant.

Poverty program staff members are also integrating CO strategies into their own grantmaking portfolios around education and income security. Mott's Community Education program provides a prime example. According to Zoe Gillett, a Mott associate program officer, CO has increasingly been seen by Community Education staff as a major and necessary component of effective school reform:

*Over the years, what we have found in Community Education grantmaking is that school-community initiatives are among the most effective strategies for improving learner outcomes. It has thus made sense to build on these initiatives in order to enhance student learning. When we looked deeper at which school-community initiatives seemed to be most effective, it was the CO models that jumped out at us. Community organizing is not only increasing the number of parents involved in their children's education — one of the things that we know matters for sure in raising student achievement — it is also increasing the likelihood that other school reform strategies will be implemented more successfully.*

The Foundation's Improving Community Education program area made grants totaling \$1.75 million in 1999 to support a growing number of CO groups and networks targeting high-poverty schools and districts for improvement. Grants in this program component, called "Success in School," are expected to continue through 2005 at the level of \$2.75 million per year or higher. The program has supported an impressive array of school reform campaigns around the country. Current grantees under Mott's Improving Community Education program include PICO, ACORN, the Eastern Philadelphia Organizing Project and Youth United for Change. All are using increasingly sophisticated organizing strategies to improve educational opportunities for low-income children through campaigns for more rigorous coursework, quality after-school programs, improved professional development for teachers and better school facilities.

Recognizing the synergy that has developed across Mott's funding programs, Gillett noted that many of the CO groups that she now supports were first funded under Mott's ISO program:

*We are very fortunate at Mott to have such a strong history with community organizing. Much of the success we have experienced through Success in School is because we have built on the CO funding efforts of Building Organized Communities, first through the ISO program and now through funding of the networks. The ISO program is helping new organizations to develop, many of which are tackling education. As a result, more than half of our demonstrations projects in Success in School have participated in the ISO program or are affiliates of a network that has received Mott support.*

## CHARTING PROGRESS

Following the decision to invest millions of dollars between 2000 and 2005 in CO, Mott trustees encouraged staff to further refine the key program objectives and progress indicators the Foundation can use to assess how well BOC meets its goals. Program staff worked collaboratively to identify the five following objectives:

- Enhancing the leadership capabilities of local organizing networks by increasing the number of paid, professional organizers in the field;
- Building the research and information dissemination capacity of the CO sector;
- Increasing public understanding of and support for CO groups, intermediary organizations and CO networks;
- Developing the organizing infrastructure for statewide and regional policy campaigns to expand educational and economic opportunities; and

- Creating new linkages between state policy analysis organizations and grassroots organizing with statewide or regional organizing campaigns.

Staff also outlined progress indicators and convening or evaluation activities in several key areas. Together, they convey the seriousness of Mott's commitment to building the power and capacity of the CO field.

- **Leadership Development.** Program staff expect Mott funding to help the CO networks double their collective capacities to train new local leaders by adding at least 15 professional organizers each year between 2000 and 2005. The Foundation plans to facilitate the recruitment, training, assignment, professional development and retention of professional organizers by establishing a permanent task force, including representatives from all of the major CO networks, to work with the Foundation in determining the field's human resource and support needs. Mott staff have committed to periodic evaluations — one in 2002 and another in 2004 — to assess the degree to which the networks have been able to create a more stable, professional and effective group of organizers.
- **Research and Dissemination.** Program staff members expect that alternative and grassroots think tanks and resource centers will become more financially secure and more capable of producing credible, focused research and information on the issues facing low-income constituencies. Program staff members hope to see these think tanks increasingly merged with or connected to strong organizing efforts. Program staff will also look for significantly increased media coverage of CO activities and impact. To encourage greater coverage, Mott staff plans to convene its CO and ISO grantees to develop local, state and national media strategies, and to harness the power of the Internet to influence public opinion.
- **Statewide and National Issue Campaigns.** Program staff expects that BOC funding strategies will produce at least 15 state welfare or economic security campaigns between 2000 and 2005, with ten achieving significant wins on behalf of low-income people. Staff will also look for at least one national issue campaign to emerge by 2001 on the issue of federal welfare reform. Staff expects, as well, that one-third of the major CO networks will develop and assist state and regional collaborations or organizations, with at least five state issue campaigns becoming active on educational equity issues. The Foundation also plans to convene state policy groups and organizing networks to tighten coordination around key education and economic issues in 2001, and to follow up two years later to determine how the meeting helped to shape future work and the effectiveness of both sectors or constituencies.

## CONCLUSION

In talking with Mott staff and trustees, one is tempted to interpret the Foundation's current CO funding efforts as an expansion of effort, with staff working across Pathways Out of Poverty's three program areas to build on and deepen the Foundation's 25-year history of support for grassroots community organizations. In many respects, they are right. Clearly, Mott's strong community orientation, leading to the development and long-term support of its ISO program, laid a significant foundation for subsequent funding developments. Such an interpretation would not do full justice to Mott's evolution, for the Foundation has traveled quite a distance from the early days of the ISO program.

Then, the ISO program supported a blend of community building, development and organizing activities in ways that neither distinguished between, nor focused on, aggregating the voices of low-income people. Today, the Foundation will be committing substantial resources — projected at \$5.5 million per year or more through 2005 — to enhance the organizational capacity, resource base and policy impact of the CO field locally, regionally and nationally. It is closing in on a serious, focused, strategic and explicit way to organize communities to shape their own futures through concerted community and political action.

Evidence of Mott's seriousness of purpose is not only seen in the level of resources that Mott is committing to CO, but also in the size and multi-year character of its CO grants; the explicit power-building language that Mott uses in its grantmaking guidelines; the interlocking strategies developed to build CO infrastructure and policy campaigns at state, regional and national levels; the significant cross-program collaboration and support for CO that is occurring within the Pathways Out of Poverty team; and the specificity with which program staff have developed program benchmarks and progress indicators.