

# **Building an Advocacy Program in a National Federation**

**Bruce MacDonald**

President and CEO  
Big Brothers Big Sisters of Canada  
Burlington, Ontario



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McConnell Program:  
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Management  
for National Voluntary Sector Leaders

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## **Abstract**

This paper argues that a voluntary-sector federation such as Big Brothers Big Sisters of Canada must be prepared to expand its present mission so as to include public advocacy as well as traditional forms of service. Although many of Canada's largest charities employ a federated governance model, little has been written about what is meant by a federation and how its characteristics affect a voluntary organization's ability to create an advocacy program. Given Canada's vast geographical, cultural and social diversity, how can BBBSC identify key issues? A framework for collaboration is crucial. This paper suggests that a private sector theory, the Delphi Method, could be adapted for use by BBBSC and other voluntary sector organizations as a collaborative approach to identifying key issues and core competence, achieving consensus, setting priorities, allocating resources and assigning roles, in order to influence both public opinion and senior government decision-makers.



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*If child advocacy is to be effective, it needs to be conceptualized better, with particular attention to selection of strategies for making bureaucracies, courts, corporations, etc. be responsive to children's needs.*

*– Davidson and Rapp*

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## Introduction

**I**N 2000, Big Brothers Big Sisters of Canada (BBBSC) was approached by the Certified General Accountants Association of Ontario (CGA Ontario) to write a letter supporting its efforts to change existing legislation and allow Certified General Accountants to conduct audits. This authority had already been granted in many other Canadian provinces. There seemed to be a natural “up side” to supporting such an initiative. With 180 local member agencies, each of which is required to submit annual audited financial statements, having a greater pool of accountants available could save thousands of dollars in audit fees. The letter was subsequently sent and was included in the CGA Ontario presentation to the Government of Ontario. The storm of controversy was immediate. From the ranks of member agencies, chartered accountants rose up to protest the BBBSC involvement in this debate. Members of local agency boards of directors threatened to resign, and letters were circulated within the chartered accountant community, encouraging the withdrawal of financial support to BBBSC and its agencies.

A decision by BBBSC to attempt to influence public policy, in an effort to create savings on administrative expenses and thereby direct those dollars to program support of children, saw the organization caught unaware in the crossfire between competing interests.

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Since its inception, the Big Brother and Big Sister programs have worked to build self-esteem and self-confidence in children. By placing a caring, safe, responsible adult in the life of a child, wonderful outcomes are achieved. Children are less likely to try drugs and alcohol, less likely to skip school, graduate at a higher rate than the average student and go on to post-secondary studies at an exceptionally high rate. But is the provision of this service enough? Shouldn't the organization also be taking more vocal, aggressive positions on issues related to children?

This paper will examine several questions related to the development of an advocacy program in a federation model of governance. It is hoped that this reflection will serve as a starting point for determining the type of role that BBBSC ought to play. It may also be of interest to other federated voluntary sector organizations undergoing similar self-questioning.

First, what is meant by the term "federation"? There are many different types of organizational structures within the Canadian charitable community. Each of these structures possesses unique characteristics and qualities that impact an organization's ability to undertake and develop new initiatives. Having a clear understanding of those characteristics enhances the ability of leaders to assess the direction or role that their organization might play on a given initiative.

Attempting to influence lawmakers or sway public opinion is not without risk. The link between lobbying and advocacy is a close one. The potential for an organization that has been traditionally viewed as a service provider, such as BBBSC, to be viewed as a special interest group is very real and may come with consequences. The second theme to be explored is the language of advocacy and its impact on an organization's ability to enter public debate.

Like the federal government, Canadian charitable organizations must deal with the vastness of geography, regional and language differences and historical viewpoints when considering issues. How does a federation such as Big Brothers Big Sisters of Canada (BBBSC) identify issues on which to speak? This paper will look at a particular private sector theory and suggest an adaptation to make it relevant to voluntary sector organizations such as BBBSC.

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The BBBS organization contains 180 member agencies, each with its own board of directors and staff. To enter the public arena on sensitive issues, the organization must present a common voice and a united front. How does a federation such as BBBS, having selected an issue(s), build a consensus on a common position? Involving thousands of volunteers and hundreds of agency staff in a debate that must take place within a realistic time frame is a serious challenge.

The development of an advocacy program could signal an exciting new era in the evolution of the Big Brother/Big Sister movement in Canada. For ninety years, the organization has concentrated on developing a powerful program to support children and youth. As the organization moves toward its centenary, it may be able to add the role of advocate to its list of accomplishments.

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*Although there is an ever-increasing body of research on non-profit management and governance, very little of it specifically addresses national affiliated, federated or “franchise” organizations.*

*– Candace Widmer and Susan Houchin*

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## 1. What Is a Federation?

**W**HILE there are numerous books, papers and Web sites devoted to the issue of how boards can govern more effectively, it appears that the unique characteristics and qualities of federated models of governance have gone unstudied on a large scale. Despite the fact that many of Canada’s largest charities employ this federated governance model, little has been written about the impact that a federation structure can have on the operation of an organization. What is meant by a federation, and how do its characteristics affect the organization’s ability to create an advocacy program?

According to the United States Office of Personnel Management, a federation may be defined as “a group of voluntary charitable human health and welfare agencies established for the purpose of providing common fundraising, administrative and management services to its members. Federations may be national or international agencies or local, representing local or regional agencies.”

During a visit to Kids Help Phone, one of Canada’s most widely recognized children’s charities, it became evident that the structure of an organization plays a profound role on how it can react and respond to issues. Kids Help Phone does not operate on a federation model. It operates with a central office controlling the brand identity, communications and fundraising strategies. That structure is the opposite of Big Brothers Big Sisters of

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Canada, where local agencies retain much of the control in those same areas. What characteristics, then, are embodied in a federation structure?

Stephanie Mabee and Jake Kupiec of Arizona State University have also identified some characteristics of a federation model of governance. These include “the creation of the federation through a charter, the presence of distinct units, locally or regionally based, and . . . a measure of autonomy . . . in the units” (Mabee and Kupiec 2001).

Another element that seems to be common in federations is the notion of “membership.” According to Widmer and Houchin (1999), “While all the national organizations in our sample had member organizations (whether officially designated as members or not) each with a separate identity, its own leaders and often its own membership and resources, these national organizations differed in the way in which the member organizations ‘belonged’.”

Chartered by twelve founding agencies in 1964, BBBSC exhibits many of these characteristics. The organization comprises 180 local agencies, each with its own independent charitable registration number, board of directors and staff, community-based fundraising and marketing program, and local service delivery system. Each local agency is responsible for selecting the mentoring programs that best serve its own community, and financial support is entirely dependant upon the willingness of local citizens and businesses to fund the organization. Local agencies sign an affiliation agreement with the national organization and pay membership dues in return for a set of services.

The very structure of the organization itself (this particularly true of national organizations) can become financially difficult to maintain. According to Susan D. Phillips of Carleton University (1999),

What is invariable is that the maintenance of federated organizational structures takes considerable resources, both financial and human. Governing structures become both more elaborate and costly because regionalism must be reflected on the board of directors. The inclusion of representatives of all or most sub-national units may result in a large, sometimes unwieldy governing board. By political necessity, annual general meetings migrate across the country. In countries with more than one official language, virtually all NGOs operate multilingually, at enormous, but necessary expense. Thus the

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impact of federalism may be to stretch voluntary associations beyond their capacity to sustain themselves.

Never has this been truer than at present. With corporate supporters looking for “more bang for their bucks,” attracting funding that can support the administrative infrastructure is becoming increasingly difficult. Media attention has focused the attention of a nervous public, already wary in the wake of numerous private sector scandals, on those charities that are not being operated in a professional, ethical manner. On 12 November 2002, in the first article of a five-part series, the *Toronto Star* featured this front-page lead-in: “More than 12,000 Canadian charities – almost one in six – spend more money on fundraising and administration than they do on charitable work. . . . Some are well-meaning but inefficient, while others run blatant scams preying on the public with aggressive, often abusive, fundraising tactics.” This sort of negative publicity, of course, makes fundraising more difficult for all charities.

Mabee and Kupiec identify a number of leadership characteristics required to make a federated organization successful: faith in the ability of units to solve their own problems and figure out the “how,” willingness to forego command and control, and understanding that no one person or group is uniquely qualified to manage everyone else. (Mabee and Kupiec, 2001). The closest private sector relative to the charity federation is the franchise model. While there are many similarities, the issues of decision making, command-and-control and autonomy highlight the differences that exist. Given the thinly stretched resources of a federation such as BBBSC, attempting to solve the problems of 180 member agencies would be impossible. Leaders at the national level of the federation have learned to persuade and convince rather than dictate and order. The national federation does not possess the legislative authority to mandate its members to act in a certain manner on many issues, nor would that style of governance be the most effective.

One of the major strengths of a federation model of governance is the ability of the organization to have strong, relevant grassroots members. Regional and national arms of the organization are created to further its mission at a local level and to provide services that will aid local units in attaining their goals. Successful leaders of non-profit federations can draw on this strength, without encumbering the federation’s ability to make decisions.

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If national federations are to take advocacy positions, they must consider how the advocacy function will be structured. It is natural that the organizations would look to their executive directors to become the “face” of their advocacy initiatives. Recent evidence, however, suggests that this may not be the most effective structural decision. According to the authors of the Strengthening Non-profit Advocacy Project (2002),

The executive director has the most influence regarding government relations and is most often identified as the person with responsibility for public policy. Yet organizations with an executive director in charge of public policy are statistically less likely to engage in all forms of public policy participation – testifying, direct lobbying, grassroots lobbying and releasing research to policy makers. Organizations where either a lobbyist or staff is in charge of public policy are significantly more likely to be engaged in public policy than when the executive director or board member has this responsibility.

The development of an advocacy program in a federation such as Big Brothers Big Sisters of Canada will test the ability of the leadership to balance the strength of local input with the need to develop consensus on positions and to take action in a timely fashion. The leadership will also need to create an effective structure to deliver an advocacy program.

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*A nation can be maintained only if, between the state and the individual, there is intercalated a whole series of secondary groups near enough to the individuals to attract them strongly in their sphere of action and drag them, in this way, into the general torrent of social life.*

– Émile Durkheim (1893)

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## 2. The Language of Advocacy

**O**VER a century ago, Émile Durkheim saw a role for groups in bringing together people and policy. The notion that individuals, by themselves, could not effect changes to policy or public opinion is central to Durkheim’s thinking. Over the years, many organizations have been created with the goal of influencing public policy or public opinion as central elements to their missions. Other voluntary sector associations view their primary missions as service provision, but also see a role in advocating for the clients they serve.

The role of secondary organizations in connecting individuals to larger structures can be seen as a fundamental component of the political process. Not only does this give legitimacy to the role played by these groups, but it is also essential in engaging everyday citizens with their governments. According to Robert Presthus (1958), “In a political context, interest groups can be viewed as a structural mechanism linking the atomic individual through a congeries of interest collectives with a vital sub-system of the larger society i.e. the formal political apparatus. This interlacing of ‘private’ and ‘public’ spheres is a critical functional requisite for both elements, giving shape and direction to individual claims and providing policy guidelines and information without which governmental elites would find it difficult, if not impossible, to carry out their role in the accommodation process.” Advocacy itself can take many forms, as illustrated in Table 1.

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In the earliest discussions taking place within BBBSC, consensus seems to be coalescing around community and legislative advocacy. For many years, in an informal way, BBBSC has been playing a role that could be considered a form of legislative advocacy. The National Executive Director, by virtue of membership on a number of coalitions such as the National Children's Alliance and the Coalition of National Youth Serving Agencies, has been working with colleagues in these groups to influence federal government agendas. A Fall 2002 survey of Big Brother and Big Sister agencies identified the "Impact of Mentoring" campaign as the highest priority for local promotion. As a public-relations initiative to promote the value of mentoring programs and the benefits for both the child and the mentor volunteer, this BBBSC awareness campaign clearly meets the definition of community advocacy.

Once the legitimacy of public policy advocacy as an organizational role has been confirmed, how do voluntary sector organizations carry out this function? For the purposes of this paper, the development of a formal advocacy program where issues are consciously selected, positions debated and articulated, and actions planned and executed, will be the focus.

Before engaging in influencing public policy or public opinion, voluntary sector organizations must become accustomed to the language of advocacy and discuss the "labelling" that can occur. Jeremy Richardson (1993) recognizes the issue. "One of the basic problems for interest group studies is the problem of definition. [Graham Wilson] notes that a wide variety of organizations are described as interest groups or pressure groups and he, therefore, asks the question 'Are we to conclude that any organization which seeks to any degree to influence public policy is therefore to be regarded as an interest group?'" Some theorists have attempted to delineate the relationship between the interest and the organization. Harmon Zeigler (1964) attempted to define this when he stated that "Group interest is not to be confused with organized associations. Certainly some formal organizations are part of particular interests, but no formal organization is an interest in itself."

**Table 1. Types of Advocacy**

<i>Type</i>	<i>Definition</i>
Case Advocacy	“Partisan intervention on behalf of an individual client or identified client group with one or more secondary institutions to secure or enhance a needed service, resource or entitlement”
Class Advocacy	An intervention on behalf of a group of clients who share the same problem or status
Internal Advocacy	Is conducted by employees of an agency to change policies or practices of their agency
Systems Advocacy	Is promoted to change policies and practices affecting all persons in a certain group or class
Policy Advocacy	Efforts to influence those who “work with laws, public programs or court decisions”
Political Advocacy	Seems to be the same as class, policy and systems advocacy
Self Advocacy	<ol style="list-style-type: none"> <li>1) Clients/consumers learn their rights and how to protect them</li> <li>2) A process in which an individual or a group of people, speak or act on their own behalf in pursuit of their own needs and interests</li> </ol>
Clinical Advocacy	The delivery of services accompanied by efforts to alter “ecological mismatches” at the root of problem behaviors
Direct Service Advocacy	Making agencies accessible and accountable to those they serve
Citizen Advocacy	<ol style="list-style-type: none"> <li>1) When a citizen “befriends” a service user and acts to understand, respond to and represent the other person’s interests as if they were the advocate’s own</li> <li>2) Individual and broader-based efforts by members of the public to effect changes in both the formulation of policies and their implementation</li> </ol>
Legal Advocacy	Representing clients before the courts or other legal tribunals
Legislative Advocacy	Promoting and influencing legislation that will benefit the deprived populations that social work represents
Community Advocacy	<ol style="list-style-type: none"> <li>1) Educate the community, define and document problems, and organize the community</li> <li>2) Advocacy on behalf of a composite of individuals in a community who have similar problems or needs but may not be known to each other</li> </ol>

SOURCE: Mark Ezell, *Advocacy in the Human Services* (2001)

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During the research phase of this paper, it became increasingly evident that the language surrounding advocacy is extremely important. The various terms that enter into this conversation – advocate, lobbyist, special interest group, pressure group, activist, educator and the rest – all create different perceptions. Richardson (1993) notes: “In an earlier work we identified over twenty names for what is essentially the same phenomenon – namely organizations pressing government to act (or not). Among the terms we discovered were: political group, lobby group, political interest group, special interest group, organized group, voluntary association, pressure group, protective group, defensive group, anomic group, institutional group, associational group, non-associational group, formal-role group, and exclusive group.”

The inclusion of the term “voluntary association” raises some issues that organizations must consider prior to implementing an advocacy program.

Voluntary sector organizations that view themselves as altruistic advocates may risk a change in public perception when they get involved in public controversy. Or they may inadvertently come to be seen as a lobby or interest group. Jeffery Berry in his assessment of popular attitudes towards interest groups reported that, “currently, a pervasive, popular perception is of an unprecedented and dangerous growth in the number of interest groups and that this growth continues unabated . . . the popular perception is that interest groups are a cancer, spreading unchecked throughout the body politic, making it gradually weaker, until they eventually kill it” (Petracca 1992). This may be an extreme view; but it is one that must be factored into the possible transformation of public opinion about a voluntary sector organization that enters the arena of advocacy.

Graham Wilson (1990) theorizes that the study of interest groups “often involves more passion than the study of other political institutions such as parliamentary or congressional committees. Interest groups have an unusual normative significance which arouses passions.” Wilson suggests a number of reasons for this sensitivity: “We might fear that interest groups will warp public policy by asserting minority rights or opinions against the interests or opinions of the majority.” A concentrated effort by BBBSC and other social service organizations to affect public policy on behalf of single-parent families may arouse the ire of the general public. Furthermore, the perception that a

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charitable organization such as BBBSC is spending its time, and perhaps donated funds as well, on efforts to influence politicians may have wide-ranging repercussions for the organization. Wilson goes on to say that in some cases “it may be possible for interest groups to temper the majoritarian failings of democracy. Interest groups allow ‘intense minorities’ vitally affected by a policy issue to prevail over majorities to whom the issue matters little.” Many of the issues that social service organizations deal with on a day-to-day basis seldom make the front pages of the newspapers or lead on the six o’clock news. Unfortunately child poverty or the plight of single-parent families, issues that affect society as a whole, are viewed as fringe issues by many. It is very difficult to generate mass-media support for these types of causes, and as a result they can be viewed as being supported by a minority. Finally, Wilson notes that interest groups “would serve a useful purpose by providing a mediating structure standing between the state and the citizen. The mediating role of interest groups may serve to protect citizens from intimidation by the state.” While the issue of intimidation by the state may not seem to apply to Canadians, voluntary sector organizations that take positions on behalf of individuals may, in fact, be assisting people who, left to themselves, might well lack the education, the courage or the energy to attempt to change government policies and practices. Such individuals can voice their opinions through the organizations from which they receive services. It does not matter whether the organization is called an interest group, lobby group or voluntary association; as soon as it undertakes an advocacy function it will be carefully scrutinized in the public arena, and its public statements and positions will not be viewed with indifference.

The Big Brothers Big Sisters of Canada organization has traditionally carried out its service provision role with no formal program to connect with government or affect public opinion. Should the organization seek to change its mandate and become a vocal champion of children, the potential exists for repercussions from all stakeholder groups. Corporate funders are the most obvious group that may object to a more politicized organization, as controversial positions on issues may create the type of media attention that has little appeal for most corporate partners. Government partnerships may also be jeopardized if the organization publicly criticizes the current policies of the very government it is seeking to partner with. From a service delivery perspective, one of the key attractors to volunteers has been the stellar reputation of the organization. Market research continues to identify the organization’s high name recognition and high program

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value as reasons why individuals want to become Big Brothers or Big Sisters. The organization definitely needs to weigh the risk of tarnishing its longstanding public image, should public perception shift from viewing the organization as a service provider to children to seeing it as an interest group that is lobbying government. But what, then, is advocacy supposed to mean?

Charity Lobbying in the Public Interest, the Washington-based US advocacy assistance group, attempts to draw a line between lobbying and advocacy.

People sometimes confuse the words “lobbying” and “advocacy.” The legal definition of lobbying usually involves attempting to influence legislation. Advocacy covers a much broader range of activities which might, or might not, include lobbying. One way of differentiating between the two terms is to understand that lobbying always involves advocacy but advocacy does not necessarily involve lobbying. For example, a group might picket or boycott a store to stop it from selling a particular product. That action is advocacy and it might result in the store discontinuing sale of the product. If that advocacy is not successful, the group might, as a next step, urge the city council to pass an ordinance prohibiting sale of the product. That action, to influence legislation, is lobbying. (CLPI 2002)

For the purposes of this paper, the definition of advocacy is that contained in the Government of Canada/Voluntary Sector Initiative Joint Tables report, *Working Together* (1999, 50):

Advocacy, in general terms, can be defined as the act of speaking or of disseminating information intended to influence individual behavior or opinion, corporate conduct, or public policy and law. Advocacy often occurs in the context of activities intended to educate and inform, while at other times it could be described as a political activity.

Regardless of the definition employed, it is clear that voluntary sector organizations entering the public debate, whether by influencing government policy or changing public opinion, risk a change in perception. This issue needs to be carefully assessed and discussed prior to the implementation of any advocacy program.

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*Ensure that the views it expresses are based on a well-founded and reasoned cause and are expressed in a responsible way.*

*– Charity Commission of England and Wales (2002)*

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### **3. Building the Program: Issue Identification**

**O**RGANIZATIONS need to be cognizant of their ability to speak knowledgeably about a given topic. Federation models of governance, particularly those with broad mandates, may experience difficulty in determining the specific issues on which to take public positions. A process, or series of processes, must be created to assess those issues that the organization can confidently put forth as a public position, based on a high level of expertise. This process would also identify issues that the organization may wish to participate in with other organizations but not play a leadership role. However, the geographic size, bureaucratic structures, infrequent assemblies or conventions, autonomous local units and chronic under-funding of national federations make the creation of a relevant, responsive advocacy process very difficult.

In an effort to develop a framework for issue identification and the establishment of an agreed-upon position, voluntary sector organizations can look to the private sector for theories and concepts that may be adopted or adapted.

C. K. Prahalad and Gary Hamel, in a 1990 *Harvard Business Review* article, “The Core Competence of the Corporation,” suggested that successful companies possess a set of core competences.

In the long run, competitiveness derives from an ability to build, at lower cost and more speedily than competitors, the core competences that spawn unanticipated products. The

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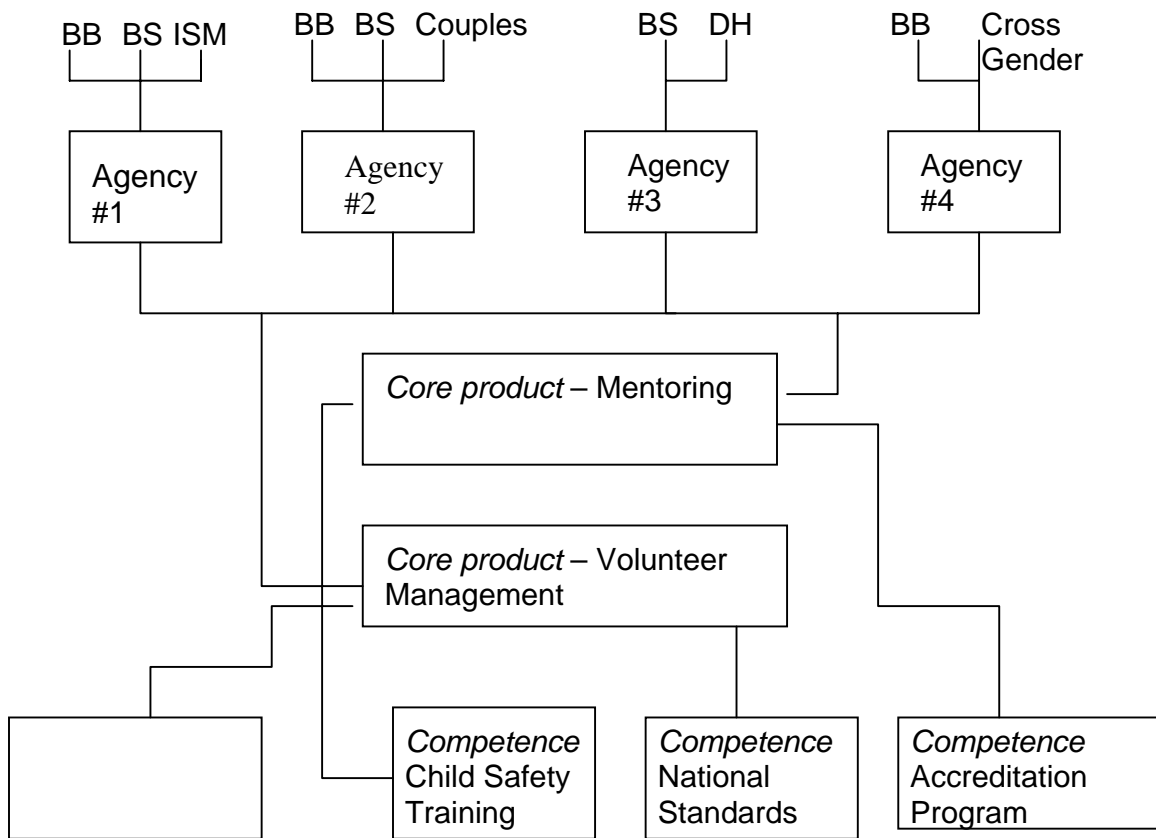
real sources of advantage are to be found in management's ability to consolidate corporate-wide technologies and production skills into competences that empower individual businesses to adapt quickly to changing opportunities.

These competences can form the foundation of an advocacy program insofar as they enable the organization to speak out on the issues that are crucial to the organization's successes.

Although Prahalad and Hamel's definition is intended to apply to the corporate sector, the parallels to the voluntary sector and BBBSC are direct. Instead of individual businesses, local agencies or chapters apply. Technologies and production skills translate into processes and experiences; unanticipated products translate into new programs and services.

The article further describes core competence as the "collective learning in the organization, especially how to coordinate diverse production skills and integrate multiple streams of technologies" (Prahalad and Hamel, 1990). The federation structure lends itself nicely to understanding the "collective learning" within BBBSC. With the participation of individuals who contribute high levels of expertise to a wide range of issues, BBBSC has developed a participatory style of decision making, which brings together the most talented members of the organization to tackle problems and find creative, productive solutions. National committees that consist of representatives of local agency staff and/or boards allow for individuals with unique talents to contribute to the national movement.

Secondly, Prahalad and Hamel write that core competence "is also about the organization of work and the delivery of value." Again, the federation model of governance is predisposed to ensuring that value is being created and delivered. With BBBSC deriving fifty percent of its revenues from the fees paid by member agencies, the issue of value for dues is a constant one. The national federation is constantly measuring value and striving to improve service to the local level.



**Figure 1. BBBSC: Core Competence and Products**

Thirdly, “Core competence is communication, involvement, and a deep commitment to working across organizational boundaries.” Prior to 1996, most of those involved in BBBSC would not have agreed that this core competence existed within the federation. Poor communication between levels of governance, the national level operating in isolation, agencies retreating into their own communities – all these problems created a culture of non-co-operation and mistrust. Today, in 2003, this third aspect of core competence is well established in BBBSC. A great deal of energy has been expended to change the culture of the organization.

Lastly, “Core competencies don’t diminish with use, but are enhanced as they are applied and shared” (Pralahad and Hamel, 1990). Many of the processes and infrastructure elements of BBBSC that would be considered integral to its core competence have been refined and improved over time. For example, the National Service Delivery Standards –

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the key child safety guidelines – have been completely overhauled in recent years. There are few who would argue that the current standards are not a significant improvement on the previous versions.

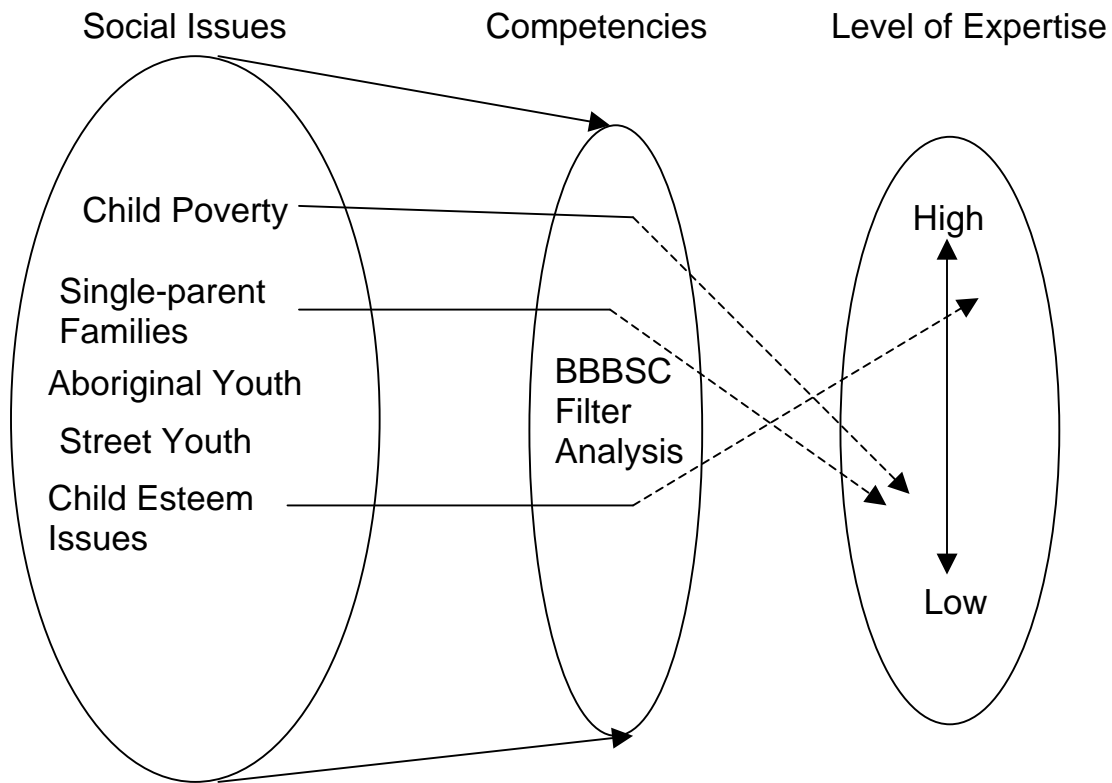
In the context of Big Brothers Big Sisters of Canada, an examination of organization and an application of Prahalad and Hamel’s model (Figure 1) suggest that the federation’s real core competence lies in the processes and strategies underlying the core products of mentoring and volunteer management.

Within each area of competence shown in Figure 1 are competence subsets. For example, the Accreditation Program consists of the training of local agency reviewers, compliance and appeal processes, pre-review preparations and non-compliance measures. Similarly, subsets are present in the other competence areas. It should also be noted that this is not an exhaustive list of BBBSC core competencies.

By employing the core competence of the organization as a filter, social issues may be assessed against the strengths of the federation to determine the degree to which the organization may speak with a measure of expertise. Figure 2 illustrates how identified social issues would be screened in this way and then categorized in terms of organizational expertise. The filter analysis would consist of a series of questions designed to illuminate the relationship between organizational competence and a particular social issue.

For example, using this framework with regard to the issue of child poverty, BBBSC would examine how the factors associated with child poverty apply to the federation’s core competence, and attempt to assess the available expertise within the organization.

The application of a series of competence-related questions would assist in assessing organizational expertise.



**Figure 2. BBSC as a Social Issues Filter**

Filter Questions related to Child Poverty:

1. Do BBSC member agencies collect statistics related to family income?
2. Do BBSC member agencies conduct program effectiveness research related to family income?
3. Do BBSC member agencies identify other risk factors that appear in the family situation?
4. Has BBSC studied the relationship between family income and the impact of mentoring programs?

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5. Does the BBBSC Child Safety Training Program address statistics related to income level and a correlation to child sexual abuse?
  6. Do BBBSC national standards address agency functioning related to child poverty indicators?
  7. Do agency reviewers receive any training related to the effects of child poverty in the orientation program that is a prerequisite to becoming a national reviewer?
  8. Do parents from families living under the poverty line provide input regarding the operation of the agency that can be measured separately from other income groups?
  9. Does the National Accreditation Program examine the issue of child poverty when reviewers visit the local agency?
  10. Does BBBSC target children from low-income families as priorities when moving children off agency waiting lists?

These ten questions, designed for a “yes” or “no” response, relate the social issue of child poverty to the strengths of the organization. In order to feel comfortable that a high level of expertise is present within the organization, the standard of 80 percent positive responses would likely be a reasonable benchmark; anything less might call into question the credibility of an advocacy position. The leadership of the organization would have this discussion and establish the benchmark percentage.

Each issue would have its own set of assessment questions. Developing an understanding of the depth of expertise needed to speak confidently on a given subject will help the federation determine the kinds of advocacy roles it wishes to play.

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*Provide information that is as accurate, current and factual as possible.*

*– Lobbyist Code*

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## **4. Building the Program: Developing a Position**

**H**AVING gained an understanding of the types of issues that the federation may wish to publicly address and how each issue relates to the strengths of the organization, a process needs to be developed to articulate a public position on a given issue. For national federations the challenges of geography, funding and timeliness create significant barriers. How is it possible to develop a common position among a geographically diverse membership base, without incurring significant costs to bring decision-makers together, and still respond to issues in a timely manner? One technique that could be employed is the Delphi Method, which a University of Salford source describes as follows:

The Delphi Method is an iterative process which was developed by the Rand Corporation as a scientific and technological forecasting tool. It has been used in fields ranging from business and education to science and medicine, for a variety of applications including the forecasting of events, sales and technological breakthroughs. The aim of the Delphi method is to combine expert opinion, by facilitating the exchange of ideas and information but enabling each participant to have an equal input by preventing bias due to position, status or dominant personalities. The method involves a panel of experts who each respond separately to a specific enquiry via a series of questionnaires. Their responses are anonymous in the sense that none of the others know who is included in the group or where each response originated from. As initial responses are made separately, new ideas may be introduced by individuals which other members of the panel have not previously considered. Material may be provided to the panel to provide a focus to the enquiry and to accelerate the process providing this does not constrain the ensuing discussion or steer consensus in a particular direction.

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Responses obtained from the panel are collated by a central coordinator and fed back to the respondents in a synthesized form. The respondents are then asked for a further response allowing them to revise their initial position if they so wish. The process is then repeated. The aim of each round or iteration is to gradually produce a consensus among the group, or alternatively for responses to become stable, since there is ultimately no guarantee that a consensus will result and a range of opinions or responses may be produced instead of a single answer (Salford 2002).

According to an Illinois Institute of Technology source on the Web (2002), “anonymity, controlled feedback, and statistical response characterize Delphi. The group interaction in Delphi is anonymous, in the sense that comments, forecasts, and the like are not identified as to their originator but are presented to the group in such a way as to suppress any identification.”

The application of the Delphi Method to a national federation may address a number of critical challenges to the successful development of a particular position or statement. Since face-to-face interaction is eliminated in the Delphi method and faxes or other forms of electronic communication are used instead, the geographic barrier is removed. In addition, both volunteers and staff from local agencies could participate as Delphi experts and could be contacted at their place of employment or at home. A second benefit of the Delphi process is that electronic or fax communications are much more cost-effective than bringing groups of individuals together for in-person meetings. This helps to overcome the financial resources barrier. The Delphi Method would also allow positions to be developed quickly by eliminating scheduling concerns of meeting participants. Finally, the Delphi technique eliminates internal politics. It is natural that within a national federation the voices of certain members may carry more weight than others. Often, large metropolitan centres with significantly larger budgets automatically assume leadership positions at federation meetings. With the suppression of identity as a key feature of this process, the opinions of all members are viewed equally.

To put this process in context: if the BBBSC federation were examining a number of roles that it could play in discussing a given issue, the use of a Delphi process would allow the organization to clearly articulate a position. The organization might yet choose to add a separate approval process, one that takes the position created by the Delphi

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experts and seeks some form of ratification from the membership. What seems certain, however, is that within the federation a group of individuals may be found who possess the greatest knowledge and expertise on a particular issue, and could fill the role of the Delphi experts. The application of the Delphi process could allow the knowledge of local staff and volunteers in both the management and social work fields to become an asset at the national level. One strength of a federation model of governance is the diverse nature of the organization and the ability to draw upon the talents and knowledge of a large pool of individuals.

In this scenario, the national office would play the role of the coordinating body, communicating with local participants and working to synthesize the information that is collected prior to its redistribution.

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*The indigenous Apache term for leader is “he who convinces us.”*

*– What Can Tribes Do?*

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## **5. Building the Program: Achieving Consensus**

**H**AVING established processes to assist the organization in identifying an issue on which to speak and created a position related to that particular issue, the federation must obtain some form of agreement from its membership to carry its message to the forum of public opinion .

This may be the most difficult element of an advocacy strategy. For most federations, particularly national organizations, limited financial and human resources and infrequent membership meetings (usually convened no more than once a year), exacerbated by Canada’s far-flung geography, may affect the organization’s ability to dialogue with all its stakeholders or achieve a consensus on any given issue. In Canada, regional viewpoints can also play an integral role in bringing a national organization into agreement on a single issue.

In the context of creating an advocacy program, what is meant by consensus building? Lawrence Susskind (1999) writes:

Consensus building is a process of seeking unanimous agreement. It involves a good-faith effort to meet the interests off all stakeholders. Consensus has been reached when everyone agrees they can live with whatever is proposed after every effort has been made to meet the interest of all stakeholder parties. Thus, consensus building requires that

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someone frame a proposal after listening carefully to everyone's concerns. Participants in a consensus building process have both the right to expect that no one will ask them to undermine their interests and the responsibility to propose solutions that will meet everyone else's interests as well as their own.

In North American society, First Nations and Aboriginal groups have a long tradition of creating consensus and employ a slightly different definition of the term. Canada's Assembly of First Nations (1993) describes the notion of consensus as follows:

Traditional First Nations governments included representatives of every family or clan. Traditional First Nations governments did not operate on the basis of majority rule. Instead, we operated by consensus, a system which requires everyone to agree on a particular course of action. Consensus, however, does not mean unanimity. Under consensus, the "majority" must find a way of accommodating the interests and concerns of the "minority." And, the "minority" conforms with the wishes of the "majority." Consensus is based on a principle that sets life in the First Nations clearly apart from the Canadian, American and European experience. That principle is the importance of collective rights over individual rights. First Nations lived by codes that made the interests of the family, clan and nation more important than the interests of the individual. Our lives were dominated by the need to fulfill our duties to our families, communities and nations. This way of life imposed an obligation on individuals to place other people's needs first. As a result, two distinctive features – sharing and cooperation – became a central focus of First Nations life. The people of the First Nations willingly sacrificed some individual freedom to the common good, because that way of life ensured the comfort, well being, safety and survival of the nation.

Many individuals join voluntary sector organizations because they are drawn to supporting a particular cause. Within the organization a spirit of camaraderie exists, as well as the sense of a shared purpose and vision. Voluntary sector organizations can achieve levels of sharing and cooperation among their members that don't ordinarily exist in society at large; individuals may only experience such feelings of solidarity during major public events such the Olympics or in times of national emergency such as a state of war. The idea of working for children, finding each of them a caring, adult mentor, brings together people of diverse backgrounds in an organization like BBBSC.

It is unfair to suggest that the shared sense of purpose found within voluntary sector organizations can compare to the spirituality, shared history and heritage of First Nations groups. Parallels, however, may be found within these groups. Voluntary sector

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organizations and First Nations groups share the connection of being drawn together by common values, such as sharing and cooperation. Therefore a number of principles present in First Nations groups may be embraced by voluntary sector organizations in the context of an advocacy discussion.

The Constitution of the First Nations Student Association of Camosun College, ratified October 28, 1999, established its consensus-building process as follows:

Decisions will be made by consensus among First Nations Student Association Council members. Advisory Members are expected to contribute to discussions but must respect the process of consensus building among FNSA Council members and need to exercise caution in terms of attempting to influence outcomes. The process of consensus must adhere to the following principles:

- The process is as important as the product;
- Every voice, opinion, and life experience is important;
- Discussion is ongoing and the highest value is respect.

Groups like the First Nations Student Association articulate a set of principles that could guide a process within a national federation. Acknowledging the importance of input from all members, ensuring that all voices are respected and working toward a unanimous agreement establish a solid basis on which to discuss advocacy issues. These principles reflect inclusiveness and a common goal.

In contrast to many federations that rely on a majority rule system of decision making, building a consensus places immense value on the convergence of individual viewpoints and the needs of the collective. It is unreasonable, however, to expect that simply because the members of the organization share similar values, they will agree on every item. Within the framework of attempting to build a consensus, there must be room for disagreement.

In 1999, Triangle Associates of Seattle, Washington, developed a consensus-based decision-making exercise around a watershed plan for the Skagit River. Table 2 is graphic representation of the degrees of agreement in the discussion.

**Table 2. Consensus for Skagit River Watershed Planning**

<b>Endorse</b>	<b>Endorse with a minor point of contention</b>	<b>Agree with reservations</b>	<b>Abstain</b>	<b>Stand aside</b>	<b>Formal disagreement but will go with the majority</b>	<b>Block</b>
"I like it"	"Basically I like it"	"I can live with it"	"I have no opinion"	"I don't like this but I don't want to hold up the group"	"I want my disagreement to be noted in writing but I'll support the decision"	"I veto this proposal"

Adapted from *Facilitator's Guide to Participatory Decision-making* (1996)

Consensus was defined in terms of "agreement along a continuum." Team members were asked to register the degree of their agreement with the language in any of the first six columns. The final column (shaded) at the right-hand end of the continuum would be considered as *not* acceptable for consensus in this process. However, anything to the left could be considered "agreement by consensus."

As discussed earlier, national federations possess unique characteristics and qualities that set them apart from other organizational types. The right of local members to act on their own opinions makes the need for a consensus building process all the more important. National advocacy efforts will fail completely if local members are working at cross purposes with their national body. Achieving consensus on issues and positions is the first significant step in moving the advocacy discussion from one of planning to one that is action-oriented.

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*We are seeing conditions move from competition to collaboration, from reaction to prevention, from outside experts to local citizens, from activity driven to vision driven and from controlled decisions to shared decisions.*

*– National Network for Collaborations (1993)*

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## **6. Building the Program: A Collaborative Approach**

**H**AVING now identified an issue, developed a position and worked to build a consensus on that position, the organization can examine the role that it will play. It is unrealistic to assume that for every issue on which a position is taken, the organization will take the lead role in an advocacy program. There are numerous ways to participate in influencing public policy or public opinion. For an organization like Big Brothers Big Sisters of Canada, which is in the infancy stages of an advocacy program, there is an initial decision that will have to be made. BBBSC is first and foremost an organization dedicated to improving the lives of Canadian children through the creation and delivery of high quality, volunteer-based mentoring programs. It has no experience in the field of advocacy, no staff solely dedicated to advocacy nor any networks through which it has attempted to influence public policy or public opinion. Therefore if BBBSC wishes to have a positive impact it will need to collaborate with individuals and organizations that currently advocate on behalf of children.

### **A Framework for Collaboration**

In gathering the collective thinking of the organization into a cohesive strategy, three areas will have to be examined from which a framework may be created. These are based on numerous feedback and planning sessions that have been conducted by BBBSC.

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1. On which issues does BBBSC consider itself to have a measure of expertise?
  2. How important is the issue for both BBBSC and the Canadian public?
  3. What level of organizational resources is BBBSC prepared to commit to the issue?

### *1. BBBSC Expertise*

One of the most frequently raised concerns in the advocacy debate revolves around the level of expertise that BBBSC can bring to a particular issue. Many of the children that are found in the mentoring programs provided by BBBSC member agencies come from single-parent, mother-led households that receive social assistance. A debate has raged within the organization on whether or not this makes BBBSC an expert on child poverty. Similar questions can be asked about issues of building self-esteem, mentoring, youth unemployment and lone parent families, among others. When determining the advocacy role it can play in working on a given issue, BBBSC must be able to agree on the level of knowledge it can confidently impart. Understanding the organization's core competence, as Prahalad and Hamel (1990) suggest, will help provide a clearer definition of its areas of strength and insight.

Where does collaboration fit into the core competence of BBBSC? Certainly the organization is involved in many forms of collaboration. From representation on youth coalitions to corporate cross-promotions to program-related partnerships involving school boards, the federation has a great deal of experience in working effectively with other organizations. Is this ability to collaborate a core competence? If Prahalad and Hamel's claim that core competences are unique, valuable, cross-functional and enduring is true, BBBSC can lay claim to a number of these criteria.

### *2. Setting Priorities*

Like all organizations, priorities must be set to provide focus and achieve maximum impact. In examining the role that BBBSC might take in a collaborative effort, the importance of a particular issue from both a social and organizational perspective needs

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to be assessed. At times there may be a state of congruence between the Canadian public and BBBSC on a particular issue; at other moments, the two may be miles apart.

For many years, BBBSC sought to improve its level of child safety through improved volunteer screening and education, and gave this issue high priority. One single event moved volunteer screening from the periphery of society to the lead story in most major media. In 1998 Sheldon Kennedy, a former NHL player, accused his former junior hockey coach of sexual abuse. Suddenly, volunteer screening and child safety in volunteer-based organizations was an issue of significance. Overnight BBBSC was sought out as a leader in this field – one that was seen as being able to speak with a certain level of expertise. In this instance, there was alignment between Canadians in general and BBBSC on a particular issue.

Setting priorities is a dynamic exercise and the Sheldon Kennedy example clearly illustrates how quickly an issue with a low public profile can become a “hot topic.” Nonetheless, each issue must be assessed on its merits, balancing the internal and social priorities of BBBSC, so that the leadership can assign them appropriate weight when addressing the advocacy roles that the organization should undertake.

### *3. Organizational Resources*

While it is impossible for organizations to allocate unlimited resources to interesting and important issues, an advocacy program is likely to attract a small percentage of the operational funds, and the leaders of the day will need to determine which debates or issues will receive these funds. Obviously, those issues that are closest to the core competence of the federation will likely be given the highest priority, but other issues may be seen to have long-term significance. When assessing the resources to be allocated to an issue, BBBSC will have to be cognizant of the pressures on the ongoing operational budgets and other strategic initiatives.

The model outlined in Table 3 is proposed as a starting point for determining the type of role that BBBSC would play in a collaborative effort designed to influence the debate on a given topic. On an issue-by-issue basis, BBBSC leaders would be asked to assess the

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importance of the topic, rate the level of organizational expertise and evaluate the level of resource commitment that the organization would be prepared to make. The outcome of these assessments would indicate the type of role best suited for BBBSC to undertake.

## **Role Descriptions**

The most aggressive role in the Issue Priority Assessment framework occurs when BBBSC feels that it has a high degree of expertise, the issue is of high priority and the organization will commit significant resources. That role is one of advocate: “a person who pleads for a cause or idea, to push for something, speak, plead, or argue in favour of” (Word Net 1997). In this sense, BBBSC would take a public leadership role in advancing the debate on a given topic. If successful, it would come to be seen as a champion of that cause. BBBSC would actively seek out other partners to help advance the debate. With a high level of expertise, BBBSC would aggressively participate in shaping policy statements regarding the issue. There are a number of issues – for example, child safety in volunteer organizations, volunteer screening and accreditation of volunteer organizations – on which BBBSC would be well suited to take on such a role.

At the far end of the spectrum is the “bystander” category. On a low-priority issue to which BBBSC is not willing to commit significant resources, or on which the organization has determined it possesses a low level of organizational expertise, BBBSC would choose not to enter the debate. Broadly defined, a bystander is, “a person in a participant role of audience or un-ratified participant” (Lingualinks 2002). In this bystander role, BBBSC would observe the debate on an ongoing basis. Periodic assessments of the three main criteria would be conducted to determine if a new role should be undertaken. An example of the type of debate on which BBBSC might choose to act as a bystander is the ongoing discussion over the “digital divide.” Many children from low-income households without home computers are falling behind their peers who have easy access to information technology. Though expert in dealing socially with children from low-income families, BBBSC may nonetheless have a low level of expertise regarding the impact of technology on their lives. This would be an extremely

**Table 3. BBBSC Issue Priority Assessment Model**

		Issue Priority Assessment			
		High		Low	
		Org. Resource Commit.		Org. Resource Commit.	
		High	Low	High	Low
Org. Expertise	High	Advocate	Expert Resource	Catalyst	Consultant
	Low	Bridge	Ally	Research Partner	Bystander

low-priority issue for the allocation of organizational resources; and while the issue appears in the media from time to time, it does not appear to be a social priority.

Between these two extreme positions are a number of other partnership roles that BBBSC could play. Each of the descriptive terms must be clearly understood for BBBSC to plan strategies related to that role. These partnership roles include:

- Bridge
- Expert Resource
- Service Alliance Member

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- Consultant
  - Research Partner

**Bridge.** *High priority. High commitment of resources. Low organizational expertise.* Westley and Vredenburg (1991) define bridging organizations as ones that “span the social gaps among organizations and constituencies to enable coordinated action.” When BBBSC wishes to commit significant resources to a high-priority issue but possesses a low level of organizational expertise, it would undertake to find like-minded groups to speak knowledgeably about the topic. This is a proactive, leadership role. The issue of aboriginal children without role models would fit into this category. BBBSC has decided that this issue is important enough to warrant the diversion of resources (day-long workshop at the national convention and a new cultural task force); yet within the organization there is a low knowledge level. BBBSC is therefore seeking to bring together organizations with the expertise to adequately address this issue.

**Expert Resource.** *High priority. Low commitment of resources. High level of expertise.* In this role, BBBSC would seek to position itself to participate in the development of comments about a position, but without assuming a primary leadership role. Without the necessary resources, becoming the issue champion would not be feasible. This role would be characterized as leadership only in the sense that BBBSC would make it known to potential collaborators that it is prepared to lend its level of expertise to the debate. One example of this sort of issue is crisis management in cases of sexual abuse. Over the decades, BBBSC has dealt with instances where former Little Brothers have accused a volunteer Big Brother of inappropriate behaviour. BBBSC has developed a process for dealing with these situations that may prove helpful to other organizations; but this is not an area that is resource-heavy.

**Service Alliance Member.** *High priority. Low commitment of resources. Low level of expertise.* Rosabeth Moss Kanter (1989) describes the service alliance as “a group of organizations with a similar need, often in the same industry, [that] band together to create a new entity to fill that need for all of them.” With little expertise and the allocation of few organizational resources, BBBSC would look to join a coalition (new or existing) to work on a particular issue. The creation of the Children’s Alliance, a loose-

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knit coalition of youth-serving organizations, is one such example of groups with which BBBSC is participating to move issues to the forefront of public opinion.

**Catalyst.** *Low priority. High commitment of resources. High level of expertise.* Karen Wilson-Dooley (2002) writes: “Simply put, a catalyst in the human sense of the word is a person who can make things happen . . . basically, a mover and a shaker. The mission of the human catalyst is to serve as a promoter for a certain cause.” Catalysts differ from advocates in that their role is to initiate a dialogue rather than build on an existing platform. However, they too exercise leadership. BBBSC can seek to play a catalyst role, and in fact has attempted to do so, in the promotion of mentoring as a viable volunteer role. In the spring of 2000 BBBSC partnered with Human Resource Development Canada to host the first national roundtable on mentoring, with representatives from the voluntary, government and private sectors.

**Consultant.** *Low priority. Low commitment of resources. High level of expertise.* Webster’s Dictionary defines a consultant as “one who gives professional advice or services.” This role would differ from the “expert resource” role in that it is reactive rather than proactive. As a consultant, BBBSC would respond to requests from other organizations or individuals attempting to develop advocacy programs on a given issue. Starting a mentoring program or building a sustainable mentoring community are areas in which BBBSC can play this role. In fact, BBBSC has formalized its consultancy role with the creation of [www.mentoringcanada.ca](http://www.mentoringcanada.ca), a Web site designed to provide tangible information to BBBSC member agencies and other voluntary sector organizations alike.

**Research Partner.** *Low priority. High commitment of resources. Low level of expertise.* According to Steve Tile (2002), “Our belief is that partners share the same goals and aspirations. For us, we felt that as research partners, we would be in lock step with our clients . . . we succeed as they succeed. This requires a shared set of values, a shared purpose, and trust between the various parties, a belief that the sum is greater than the parts.” The Research Partner role is one that BBBSC would play in an effort to amass data and improve its organizational expertise on a specific topic. While working with other groups to research an issue, policy statements would be created to advance the debate. One current study that fits this description concerns the impact of a mentoring intervention on the children of adults in the prison system. Individuals from BBBSC and

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the Elizabeth Fry Society are researching data and best practices across North America. Should the data indicate significant promise, this topic may be moved from the Research Partner category into a more active role.

The advocacy approach suggested in this paper for BBBSC clearly relies on the organization's playing specific collaborative roles, in different situations, based on organizational analysis and environmental assessments. Nelson Phillips, in a 2002 McGill University lecture, suggested that collaboration aimed at transformation involves "looking to affect government, change the definition of words or the world around you." This definition captures the essence of the BBBSC approach to advocacy. Unable to impact public policy or influence debate on its own, BBBSC must be prepared to work with others to achieve its goals.

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*The voluntary/non-profit sector is evolving rapidly from a model based on charity to one based on civil society – that is, from a model premised on helping those less fortunate to one in which communities have the resources and are empowered to represent and help themselves. This has sparked the emergence of strong national leadership aimed at providing strategic direction to the sector and the demand for new policy tools and citizen engagement processes.*

*– Susan D. Phillips, Carleton University*

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## **7. Conclusion**

**F**OR Big Brothers Big Sisters of Canada to avoid a repetition of its experience with the Certified General Accountants and Chartered Accountants, it must carefully examine the idea of adding a new dimension to the work that it has traditionally undertaken: that of a vocal champion of children’s issues.

Since this paper was first conceived, Big Brothers Big Sisters of Canada has embarked on some tentative first steps in the area of advocacy. A “Building Influence” campaign has begun, in which member agencies contact their local Member of Parliament and ask him or her to meet with and reintroduce the organization. The first phase of the program sees agencies update their Member of Parliament on the progress of the organization, particularly the phenomenal growth in the number of children being served by Big Brother/Big Sister agencies.

The second phase of the campaign calls for meetings with MPs and senior-level bureaucrats to focus on specific issues. The process of identifying those issues, developing a position and having that position adopted by the membership is now underway.

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This paper has attempted to identify a set of steps that national federations like BBBSC can consider in their efforts to build an advocacy program and become partners in this new social endeavour:

1. Fully discuss the potential impact that the inclusion of an advocacy component may have on public perception of the organization. The viewpoints of all stakeholder groups should be factored into this deliberation.
2. Identify the issues upon which to speak with the help of a Core Competence Analysis. Using the concept of core competence, an organization can assess its level of expertise on any given subject.
3. Employ methods such as the Delphi Technique to involve all elements in the structure of a national federation in the definition of its position on a given issue.
4. Seek consensus on the defined position. While this is a challenge, national federations can look to the principles of consensus-building used by First Nations communities as a starting point for discussion.
5. Consider what role to play on this issue. Using an Issues Priority Assessment will help clarify the various roles that a national federation might play as well as the resources it is willing to commit to actions plans.

National federations are complex organizations. Voluntary sector leaders often work with limited resources and an immense geography, while attempting to balance the need to provide leadership with the wishes of the grassroots membership. Introducing an advocacy program into a federation, whose mandate has been to serve rather than advocate, will be a definite challenge.

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