THE SHIFT – From Agency-led Services → to Participant-Centered Services and Organizing

Rubric for Nonprofit Engagement of Participants (a/k/a residents, constituents, clients, consumers, recipients)

Categories ***I. Organization Structure & Leadership***	**Agency-Led Hierarchical Organization**	**Agency-Led with Some Collaboration with Participants**	**Agency Moving Toward Full Participant Collaboration**	**Participant-Centered Agency**
Who leads the projects? **(Demand-driven)**	Agency independently identifies community problems or needs without participant or community input. Agency staff design strategies as solutions to community problems. Community is expected to accept what is offered by agency. There is no feedback loop for external response. Agency is concerned about clients not using services as presented.	Agency assesses the community. The assessment tools, e.g. surveys, are transactional and do not build relationships. Based on assessment, the agency decides what needs to be done and conducts the project. Agency wonders why clients do not use services as presented.	Participants and agency cooperate to develop the listening strategy. Listening focuses more on community strengths than deficits, and listening process, e.g. one-to-one conversations, builds relationships.	Participants decide for themselves what they need and want to create. The work develops organically through the self-regulation of the participants with agency staff in facilitative, servant-partner roles. . All programs are developed with participant leaders. Participant leaders develop (and shut down) programs, depending on demand.
Does organization structure include spaces for community participants?	Agency staff fully in charge of developing organizational structures, programs and evaluations. Programs, meetings and events are scheduled at times or in ways that may be inconvenient for community.	Participants included in community needs assessments and evaluation of services. Some of that information is used to develop programs. Staff start to notice how service provision can exclude some participants.	Staff and participants inventory strengths as well as needs to inform program delivery. Participants are integral part of evaluation of program delivery. Participants and staff problem-solve to ensure services are accessible.	Staff and participants together listen to and explore community concerns. They co-create services, roles for residents, program offerings and parameters, feedback loops, evaluation and success measures.

I. Organization Structure & Leadership, cont.	**Agency-Led Hierarchical Organization**	**Agency-Led with Some Collaboration with Participants**	**Agency Moving Toward Full Participant Collaboration**	**Participant-Centered Agency**
How are participants engaged? **(Membership)**	Agency sees clients primarily as recipients of services. There are no other ways for clients to connect to agency.	Participants contribute when it is convenient for the agency.	Participants are frequent contributors to agency processes. They are moving to feeling like they belong and have a role in fostering collective action.	Participants own and lead the process. Participants feel welcomed, accepted, and know they have in important role to play. They feel they belong, have a voice, give back, and foster collective action.
Does participants' expertise get leveraged? **(Reciprocity)**	Expertise comes from degrees or professional achievement. People without degrees or who use agency services are not consulted. Hierarchical relationships within staff and between staff and participants.	Participants are asked what their needs are, but seldom asked to participate from their strengths.	Participants are asked to participate and share their strengths and assets to support agency projects. Agency staff serve as facilitators, not experts.	Participants work as equal partners with agency. Participant leaders emerge, and training is available to them. Everyone is considered an equal participant.
Relationship between organization and participants	Relationships based on the agency's hierarchy and professional goals and objectives.	Agency leaders (staff, board) begin to name the limits that hierarchy places on relationships and why that matters to the work.	Participants and agency leaders explore what ethical communication looks like, and address unhealthy communication practices in the organization.	Relationship are healthy. Open information flows freely. Vulnerability is possible. Conflict is embraced as necessary and engaged in an open way. Lessons are shared.
Who has control? **(Governance)**	Agency exercises traditional control (hierarchical staff, board includes no participants). Top leadership makes decisions without staff or participants' input. There is no participant voice in decision-making or in control of resources.	Agency exercises control, however, participants are consulted. Participants' input may or may not be honored. They are not informed about how their input was used.	Control is shared with participants, such as a seat on the board, or an advisory committee. Staff and leadership open up space for effective participation in these limited roles. Participant input is heard, but if it is too inconvenient it will not be implemented. Participants are aware of how their voice is heard.	Top staff leadership, Board members and volunteers fully support inclusive practices in the organization. Participants are aware of how decisions are made and are active at all levels. Several serve on the Board, some in leadership roles.They are informed and fully participate in resource allocation: community-led budgeting.

II. Organization Identity & Culture	**Agency-Led Hierarchical Organization**	**Agency-Led with Some Collaboration with Participants**	**Agency Moving Toward Full Participant Collaboration**	**Participant-Centered Agency**
Learning organization	Agency sees expertise as based on professional credentials and research. Agency approaches work as either success or failure and does not see value of 'learning as we go.' Agency prefers to try only those new ideas that are "evidence-based best practices." Agency designs and administers evaluation tools.	Agency acknowledges participants have expertise, but only in certain narrow categories, such as their culture. Agency is open to learning through the process. Agency designs evaluation tools, but may seek community feedback about the tools.	Agency values participants' expertise in all facets of community work. Prototyping activity is shared with group. Process is seen as an opportunity for learning, and agency adapts to results of evaluation and changes. Learning journeys are offered to community members. Projects begin to do evaluation *with* participants, from designing to implementing and analyzing the evaluation.	Agency staff and participants learn together Learning Community: discover what to do; not decide what to do. Observe,Learn,Act. Open to introducing and utilizing new ideas, methods and tools. Open Heart and Open Mind, Open Reflection on Action
Organizational culture	Hierarchical. Organizational survival and maintenance are of primary importance.	Agency understands that participants have expertise to bring, but still a clear hierarchy with agency professionals at the top.	Openness to try something and reflect. People-to-people connections highly valued, along with safe environment for people from different backgrounds to build community.	Adaptive: willing to be flexible and modify processes. Open to ideas. Innovative: members introduce and create new ideas, methods, tools. Transformational: reframing of roles & relationships. Develop principles & practices of participant-centered organization.
Assets of organization	Assets not seen as applicable to the larger community. Fortress mentality (our assets are for our organization only).	Organization assets that will make for a stronger community are mapped.	Some organization assets are made available for community use (without having to originate from organization).	Organization assets and knowledge are made available openly.
Staff capacity for community engagement and listening	Staff asks participants for stories that support the agency's agenda.	Staff asks participants to gather stories of others' that support the agency's agenda.	Participants are occasionally engaged to review the agency's connection to community.	Participants have a place in the agency structure for regular dialogue with staff. Participants regularly evaluate listening and inclusion practices of the agency.

III. Relationship to Local Community	**Agency-Led Hierarchical Organization**	**Agency-Led with Some Collaboration with Participants**	**Agency Moving Toward Full Participant Collaboration**	**Participant-Centered Agency**
Local economy	Agency does not utilize resources to support the local economy. Cheapest, rather than local.	Agency understands there is opportunity to support the local economy. Mapping of local providers and gift-givers begins.	Prototype some buy local; some local hire, some local training.	Local economy is a key component of resource allocation; hire local; train local; bank local.
Engaging who is missing (youth? labeled people? elderly?)	Agency only works with people who it is funded to work with. Little energy given to seeing agency work in a larger context.	"Stranger Inventory:" Agency starts asking "who is missing?"	Agency supports ability of missing people to participate & contribute (ride, childcare, relationships, etc.).	Agency's networks are constantly expanding. Every person represents knowledge and resources and relationships that can be contributed. Organization is bridge for community to be engaged.
Partnerships with community	Partnership with other helping agencies driven by external motivators (such as required by funders or regulation).	Go beyond service providers: library, church, community org, etc.	Partnership widens beyond usual suspects. Find common interest and commitment.	Move to action with community. Presumes shared power and shared control of resources. Shared ownership.

IV. Power, Privilege and Equity	**Agency-Led Hierarchical Organization**	**Agency-Led with Some Collaboration with Participants**	**Agency Moving Toward Full Participant Collaboration**	**Participant-Centered Agency**
Privilege & power	Organizational hierarchy is maintained based on job title, wealth.	Participants and organization leaders question structures of power and learn how they work in society at large.	Participants and organization leaders do a racial and economic justice analysis of their community and organization, and clarify the organization's theory of change.	The community and organization together create an inclusive process to name, challenge and shift power and privilege dynamics within the organization and in the community. Participants become staff and board members.
Racial equity	Agency director determines unilaterally if agency's staff and policies uphold racial equity, or if that is even an issue.	Staff invite participants into a process that explores concretely the importance of racial equity in the work of the agency.	Participants and staff identify organic community leaders of color to assist agency in creating change. Staff and participants analyze racial equity practices and outcomes for the organization and the community using the lens of their mission issue. Agency practices ensures full participation of people of color at all levels. Participant input into changes is honored.	Participants are or are connected to leaders in communities of color. These skilled leaders work with other participants to ensure that agency practices recognize and support ongoing indigenous leadership and initiatives pertinent to the mission in communities of color. Agency practice fully reflects the desires, strengths and needs of the communities in which it is rooted.
Economic justice (class equity)	Agency director determines unilaterally if agency's staff and policies are responsive to issues of class, or if that is even an issue.	Staff invite participants into a process that explores concretely the importance of class issues in the work of the agency.	Participants and staff identify organic leaders who are low income to assist the agency in creating change. Staff and participants analyze class issues and identify practices and outcomes for the agency that ensure the full participation of low income people at all levels.	Participants are or are connected to low income leaders. These skilled leaders work with other participants to ensure that agency practices recognize and support ongoing indigenous leadership and initiatives pertinent to the mission in low income communities. Agency practice fully reflects the desires, strengths and needs of its low income participants.