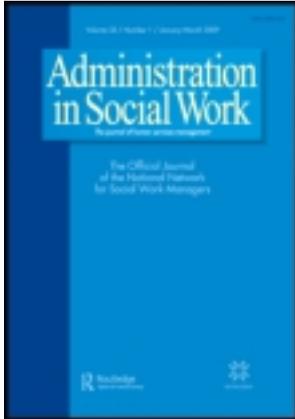


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The Beliefs of Homeless Service Managers About Policy Advocacy: Definitions, Legal Understanding, and Motivations to Participate

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Policy advocacy involvement by human service providers is important to help protect vital services and government funding streams, but for many organizations participation is limited. Meanwhile, scholars know little about managers' beliefs about advocacy, compromising our ability to create effective interventions. Using qualitative data from homeless service providers, this article investigates what holds nonprofit managers back from greater advocacy involvement. Findings indicate that managers have a broader working definition of advocacy than is generally found in research and limited understanding of the legal regulations. Belief in the organizational and mission-related utility of advocacy was more important for helping managers overcome capacity-related barriers than a social justice orientation.

Keywords: advocacy, human services, lobbying, management, nonprofit organizations

The increasing insecurity of the social safety net and growing devolution of policymaking authority to local government has made policy advocacy involvement by human service providers a topic of increasing scholarly and practical concern (Andrews & Edwards, 2004; Gilbert, 2002; Soss, Schram, Vartanian, & O'Brien, 2001). As well as lending their voices to help protect benefits for marginalized communities, advocating human service nonprofits can help procure resources and improve policies by serving as vital information conduits regarding how policy is working on the ground. For these reasons and others, participation in policy advocacy is specifically called for in the National Association of Social Workers' Code of Ethics (National Association of Social Workers, 1999). Additionally, as human services nonprofits are increasingly dependent on government funding to support their services, policy advocacy has become an important tool to help organizations manage and influence the policy environment that determines funding levels (Gibelman & Kraft, 1996).

Despite the benefits advocacy can have for maintenance of funding streams and more equitable policies, the on-the-ground involvement of human service nonprofits in policy advocacy varies

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greatly. Some organizations are highly active, participating in government committees and commissions, lobbying, and playing key roles on advocacy coalitions. Other organizations participate only minimally, perhaps attending coalition meetings and signing petitions but not devoting a meaningful percentage of staff time to it. Other organizations choose not to participate in advocacy at all, generally citing that they don't have time, don't have the resources, or don't feel it is their mission (Salamon, Geller, & Lorentz, 2008). Estimates regarding the percentage of human service nonprofits involved in policy advocacy at all have varied from 18% (Salamon, 1995) to 57% (Mosley, 2010).

Knowing which organizations are involved in policy advocacy, what barriers exist, and how human service providers can more easily become involved is an important research goal if we are to help strengthen nonprofit human services and social work practice (Berry & Arons, 2003; Donaldson, 2007). Recent research on the policy advocacy involvement of human service nonprofits has clearly demonstrated that the structural characteristics of an organization play a vital role in determining whether it will be involved in advocacy and to what degree. For example, we know that larger organizational size, greater dependence on government funding, and active collaboration are all strongly associated with increased advocacy activity (Chaves, Stephens, & Galaskiewicz, 2004; Child & Grønberg, 2007; Donaldson, 2007; Mosley, 2010). What is not yet clear, however, is how agency leadership may moderate those effects.

Advocacy outcomes are likely not purely a result of structural incentives and constraints. Managers that are committed to advocacy involvement may play an important role in overcoming potential constraints, like small size (Ezell, 1992). Research has shown that leaders who have a strong interest in political activity can boost acceptance of this activity in an organization, even when institutional pressures to avoid it are strong (Marwell, 2004). What is it, then, that leads some managers to embrace the advocacy role and others to reject it? Research has yet to clarify this point, but the answer is important. The structural characteristics of an organization are not mutable; managers' knowledge and beliefs are likely much more amenable to potential intervention.

If scholars are to understand how to help develop and strengthen advocacy among human service nonprofits, we must develop more specific knowledge of how advocacy is experienced by managers themselves. Central to this understanding must be what motivates human service managers to become involved in advocacy and which barriers, beyond capacity issues, are most pervasive in limiting or silencing their advocacy activity. Those barriers can include knowledge of how to get involved, understanding of legal restrictions, or belief in its efficacy. Human service nonprofits vary greatly, from highly formalized multi-million dollar housing organizations to informal drop-in centers. As well as being different structurally, these organizations often employ different types of managers—some highly professionalized, with careers focused on administration and development, and others much less so, some even formerly clients themselves. These differences may come along with differences in beliefs about advocacy: about its importance, its legality, and its potential pay-off. These different beliefs may lead some managers to overcome capacity and funding issues to participate in advocacy, while others hold back.

Using qualitative data from a representative sample of homeless service providers in Chicago, this article investigates several aspects of how nonprofit managers understand advocacy in order to understand what holds some back from participating more. Homeless service providers were chosen for several reasons: their clients often face severe political underrepresentation, they are highly varied in terms of size and professionalization, and the field has a history of activism (Snow, Soule, & Cress, 2005; Verba, Schlozman, & Brady, 1995). A qualitative approach was chosen for this study in order to deeply probe managers about their beliefs and intentions, and focus analytical attention on their reasoning, not simply their activity.

Three research questions are addressed. First, what activities do managers consider to be policy advocacy? Second, how well do managers understand the legal regulations around advocacy? Third, what motivates human service managers to become involved in policy advocacy? Findings indicate that managers have a different working definition of advocacy than is generally assumed

in research, and their understanding of the legal regulations is imperfect. However, it is the professional norms that come with nonprofit management training and experience, not personal passion, that help managers overcome barriers to participation and involve their organization in advocacy in more meaningful ways.

WHAT ACTIVITIES DO HUMAN SERVICE MANAGERS CONSIDER TO BE POLICY ADVOCACY?

Understanding how managers define advocacy is important because it is impossible to fully understand what holds organizations back from participating in advocacy if researchers and managers do not have a shared understanding of the topic (Berry & Arons, 2003). Unfortunately, the nature of survey research might lead researchers to underestimate participation. In survey research, the meanings of specific terms are not open to negotiation. Researchers have a choice between leaving terms undefined (and thus privileging the definition of the respondent, which remains unknown and a devastating threat to reliability) or defining them *a priori*, which leads to greater reliability regarding the findings, but may compromise construct validity.

The second approach, defining for respondents what is meant by specific terms like “advocacy,” is generally preferred. As a result, surveys have asked respondents about advocacy using slightly different definitions and it is unclear which definition produces the most valid answers. This also makes comparability across studies difficult. Alternatively, some researchers choose to ask about involvement in specific activities, and use those to estimate advocacy involvement (Allard, 2009; Donaldson & Shields, 2009; Schmid, Bar, & Nirel, 2008). This approach cleverly sidesteps the definitional problems and increases reliability, but it limits our understanding of advocacy to only a few specific agreed-upon activities. Another approach is to rely on information reported on federal tax return forms (e.g., Nicholson-Crotty, 2007) but this is likely to severely underestimate actual advocacy participation as organizations are not required to report any advocacy activity that is not lobbying.

Research from the Strengthening Nonprofit Advocacy Project (SNAP) highlights the importance of understanding more about how managers define advocacy (Bass, Arons, Guinane, & Carter, 2007; Berry & Arons, 2003). Anticipating that words like “lobbying” may be loaded for some managers, researchers systematically varied the words “lobbying,” “advocacy,” and “educate” in a single question to see if responses would vary accordingly. Not surprisingly they found that many more managers responded positively to questions about “educating” than they did about the others (Bass et al., 2007).

To help shed light on how human service managers understand advocacy, and what activities are considered to be advocacy at the ground level, this study uses qualitative data to more fully explore how managers define advocacy and lobbying, and what activities they include in their definition. In order to ensure that these answers could be compared with an accurate understanding of what managers were actually doing, they were also asked about their participation in lobbying or other tactics researchers often consider advocacy without having those tactics labeled as such.

HOW WELL DO MANAGERS UNDERSTAND THE LEGAL REGULATIONS AROUND POLICY ADVOCACY?

Scholars have long been concerned that the IRS regulations that regulate lobbying for 501(c)(3) organizations are a source of confusion for managers, and thus, a potential barrier to their participation in advocacy (Bass et al., 2007; Berry & Arons, 2003). These regulations are complex

and can be confusing, but are attached to severe sanctions, including loss of 501(c)(3) status. Research has confirmed that many nonprofit managers are confused about the rules and indicated that fear of sanctions may lead some organizations to opt out of advocacy altogether (Bass et al., 2007; Berry & Arons, 2003).

The truth is that policy advocacy is actually much less restricted than many practitioners think. Most forms of policy advocacy are not regulated or restricted at all. These activities include belonging to an advocacy coalition, issuing policy reports, talking to government agency administrators, or helping clients organize. It is primarily lobbying, which is defined as attempts to influence the passage of specific pieces of legislation, that is restricted for 501(c)(3) organizations (election-related activities, such as endorsing candidates, is prohibited for 501(c)(3) organizations). Note that lobbying is not prohibited, simply restricted, meaning that there is a cap on the amount of money that 501(c)(3) organizations can spend on it (Raffa, 2000; Reid, 2006). Organizations that choose what is called a 501(h) election receive clear guidelines on how much they can spend, but research has shown that many organizations do not know about the 501(h) election or are confused about its benefits (Berry & Arons, 2003).

The degree to which managers understand the distinction between advocacy and lobbying, and understand what they are legally able to do in terms of advocacy, could be an important constraint for some organizations. In-depth qualitative interviews provide the opportunity to explore managers' definitions of these terms, their understanding of the lobbying laws, and the degree to which this understanding held them back from involvement.

WHAT MOTIVATES NONPROFIT MANAGERS TO BECOME INVOLVED IN POLICY ADVOCACY?

Research has shown that executive directors often have primary responsibility for carrying out policy advocacy, as staff members often lack the time, expertise, or authority to be involved (Bass et al., 2007; Salamon et al., 2008). This may hold organizations back from participating if that individual is not motivated to do so. For example, managers may lack training in advocacy, believe that advocacy is outside of the organization's mission, or not believe advocacy will have meaningful benefits (Ezell, 1992; Schneider & Lester, 2001). Studies have shown that many managers are confused about IRS rules and often feel too overwhelmed with day-to-day tasks to increase their advocacy participation (Bass et al., 2007; Berry & Arons, 2003). Furthermore, executive leadership is generally not rewarded for attempts to achieve broad community objectives; rather, they are encouraged to focus on more narrow organizational goals (Eisenberg, 2000).

What may cause some leaders to embrace advocacy more than others and overcome those day-to-day barriers? Nonprofit leaders come from a variety of different backgrounds and have different orientations to their work (Suarez, 2010). Some have extensive training and background in management, while others rise through the ranks or have only limited administrative experience outside of their current position. Research has shown that nonprofit leaders who are management professionals (as opposed to managers with little formal education or only substantive expertise) are much more likely to champion formal, business-like practices—but are also more oriented to demands from funders than from clients (Hwang & Powell, 2009). Leaders with different backgrounds also are known to have different interpretations of the field they work in and share different norms (Fligstein, 1990). For example, shared professional norms may lead trained managers to believe that advocacy is an important part of managing the organization's external environment, while those without that training may see it as less important. However, the opposite could also be true. Professional managers may be less likely to engage in advocacy if they see it as a waste of time or with little payoff for the organization itself. Although some research has indicated that having a leader with

a master's or professional degree is associated with a higher rate of advocacy involvement, much more information is needed to determine why (Mosley, 2010).

On the other hand, because advocacy is strongly value-laden as an activity, it may be driven by more idiosyncratic differences, such as personal passion or a social justice orientation (Bass et al., 2007). In the human services, advocacy is often presented more as a moral good than a management technique (Hoefler, 2006). Additionally, for some individuals, advocacy involvement can be important to maintain job satisfaction and a feeling of "making a difference" (Abramovitz, 2005). Thus, managers with a strong social justice orientation may see advocacy as an essential part of their professional identity, whereas others more oriented to individual services may see policy advocacy as less relevant.

METHODS

Qualitative research methods were chosen in order to maximize understanding of how managers interpret their professional world. The use of qualitative data is important as it focuses the analysis squarely on managers' intentions and reasoning and is sensitive to variations in context. By using qualitative data I was also able to probe managers' definitions of advocacy and their understanding of legal regulations more deeply than would be possible in a survey (Padgett, 2008).

The units of analysis were executive directors of homeless service nonprofits, defined as organizations with 501(c)(3) status where at least one of the organization's three largest programs specifically focused on serving the homeless. These organizations include emergency shelters, transitional housing providers, and providers of other basic needs services, among others. Using databases and membership lists maintained by the National Center for Charitable Statistics, GuideStar, and the Chicago Alliance to End Homelessness, 86 of these organizations were identified in the city of Chicago in August of 2008. All were primarily direct service providers, not advocacy organizations.

Due to the small size of this population, it was possible to use representative sampling in conjunction with the qualitative approach. The population was stratified by size (as measured by expenditures reported on the organizations' most recently available 990 tax return) and service provided (e.g., transitional housing, emergency services). Organizations were then randomly chosen from each stratum to populate the sample. The chosen sample consisted of 54 organizations, two of which were later found to be defunct, resulting in a final sample of 52 organizations.

The executive directors of the sampled organizations were contacted initially by letter and then by telephone. Forty-two directors agreed to participate and were interviewed. These semi-structured, in-depth interviews lasted between 1 and 2 hours and took place between August 2008 and April 2009. The interviews solicited information about a variety of topics related to advocacy involvement including motivation, barriers, and tactics, as well as other organizational characteristics such as collaboration and government funding. The complete interview schedule can be found in Appendix A. The response rate was 81%, with data collected from half of the homeless service population in Chicago.

All interviews were digitally recorded and then professionally transcribed. All transcripts were used in the analysis. The analysis procedure was a modified comparative case study, similar to that described by Yin (2009). The coding scheme used both inductive and deductive techniques by including codes that reflected topics of *a priori* theoretical interest as well as codes that emerged from open coding, which reflected new insights (Patton, 2002). Each transcript was coded by two independent coders working iteratively through the transcripts until no new relevant codes emerged. Those codes were then used to explore differences between cases in regards to the research questions.

Memos were also used extensively in the analysis. Case summary memos were written immediately after each interview, and additional memos were written during the analysis phase regarding possible connections to existing theories and emerging themes (Miles & Huberman, 1994). Data from the interviews and memos was complemented with field notes written during participant observation at advocacy coalition meetings and other field-level events where advocacy was discussed. Negative case analysis was used to provide additional insight into sources of variation (Patton, 2002). Member checking was also used to enhance validity; this was done through sharing initial findings with respondents, requesting feedback, and discussing the findings at several advocacy coalition meetings.

Descriptive Statistics

Descriptive statistics on the sample can be found in Table 1. Most organizations were fairly young, with a mean age of 22 and a range of 4 to 68. Organizations varied considerably in size, which was measured as amount of annual expenditures. Organizations ranged from \$7,000–\$11 million in expenditures. To provide a clearer picture of the variability in size, organizations were broken down into rough categories: 26% of the sample can be categorized as small (expenditures under \$500,000), 31% as medium-sized (expenditures between \$500,000 and \$2 million), and 43% of the sample was large (expenditures over \$2 million). Most respondents had some government funding, but the amount varied considerably. For those that had government funding, the mean was 45% of their budget. A similar categorization procedure reveals the variability: 17% of organizations had none, 19% had low government funding (1%–33% of their budget), 28% had a medium amount of government funding (34%–66% of their budget), and 36% had high government funding (67%–100% of their budget).

TABLE 1
Descriptive statistics (N = 42)

Age of organization	Range: 4–68 Mean: 22 Median: 19	
Organizational size (as measured by expenditures)	Range: \$7,000–\$11 million Mean: \$2,447,122 Median: \$1,603,824	Small (under \$500,000): 26% Medium (\$500,000–\$2 million): 31% Large (over \$2 million): 43%
Percentage of government funding	Range: 0–100% Mean: 45% Median: 48%	None: 17% Low (1%–33%): 19% Medium (34%–66%): 28% High (67%–100%): 36%
Percentage faith-based	Yes: 33%	
Overall professionalization of executive director	<i>Qualitative indicator based on the executive director's educational attainment, prior work history, and position in the field.</i>	Low: 26% "Limited professional exposure and training" Medium: 26% "Rose through the ranks," "Second career" High: 48% "Management professionals"
Educational background of the executive director	No advanced degree: 33%	Advanced degree: 67% Social work: 36% Business: 21% Religion: 11% Other: 32%

TABLE 2
Professionalization of the executive director, by size of organization (N = 42)

	<i>Small organizations</i>	<i>Medium sized organizations</i>	<i>Large organizations</i>	<i>Total</i>
Low professionalization	55%	36%	9%	100%
Medium professionalization	18	36	45	100%
High professionalization	15	25	60	100%

There was also significant diversity in regards to professionalization of the executive director. Professionalization was determined based on a complete coding of available information including the executive director's level of education, prior work history, position in the field, and other information revealed in the interview. Two independent coders assessed each case for their level of professionalization, with an inter-rater reliability of 86%. On those cases where coders diverged, a single code was determined by discussion and consensus. Approximately 26% of organizations had low professionalization, 26% medium, and 48% high.

As expected, high professionalization of the executive director often came hand-in-hand with large organizational size, but there was still significant variability within the sample. Many directors with low professionalization were found at the head of medium and large organizations, and many highly professionalized leaders were at the head of small organizations. This variability allows for adequate diversity in the sample to explore the effects of professionalization holding size of organization constant. See Table 2 for the complete breakdown.

RESULTS

Great variation was found in the degree to which organizations (and their managers) participated in advocacy, but, surprisingly, not on whether they participated at all. Managers in this sample reported very high rates of engagement in policy advocacy. All organizations that participated in advocacy had leaders that were also involved. Only three organizations out of the 42 interviewed were not involved in policy advocacy in any way, meaning that 93% did participate. However, many of these organizations were involved only in very minor ways. Thus, when variability on advocacy is discussed below, it is generally referring to degree of involvement, not simple participation.

This participation rate is substantially higher than is generally found in surveys of nonprofit advocacy. Although there are contextual issues that incentivize advocacy in this field (specifically, opportunities for collaboration and reliance on government funding), this finding is likely at least partially a result of a qualitative methodology that followed managers' own definition of policy advocacy.

Definitions of Policy Advocacy

In the interview, managers were not given a definition of advocacy, but rather asked to define the term on their own. Sample questions in the interview include, "Even if you don't participate in them, what kinds of activities do you think of when you think about policy advocacy?" and "Can you give me an example of something you recently did that you would consider policy advocacy?" Findings revealed that managers often interpreted certain activities they engaged in as "advocacy" that may not be obviously included in the definitions of advocacy used in most surveys. Notably, managers included most types of community outreach (e.g., newsletters, open houses) as advocacy,

as well as attendance at meetings with fellow service providers—whether or not policy makers were in attendance or advocacy action was discussed.

Examples of these kinds of activities included, “Mm-hmm. Yeah. Let me see. I mean we do hold things like community forums,” or “We usually send someone to meetings at the Alliance (the local HUD continuum of care network).” In both cases these organizations did not participate in advocacy tactics that were more obviously “public policy” work. However, this type of activity is clearly externally focused on improving conditions in the larger political environment and thus should probably not be automatically excluded from advocacy definitions. Some managers had definitions that were even further afield, however, and mentioned specifically that they knew their definition of advocacy might differ from that of researchers. As one manager said, “How we’re trying to do [advocacy] is more through educating our volunteers and our constituency about really treating people with dignity and love and care. So I know that’s not where you’re going with the whole policy thing.”

A parallel finding is that, later in the interview, managers were asked about their involvement in a variety of activities that researchers commonly consider advocacy. These included involvement in advocacy coalitions and meetings with government agency administrators. Many times managers who earlier reported that they did not engage in advocacy did report engagement in these activities. This finding is similar to that reported by SNAP researchers (Bass et al., 2007; Berry & Arons, 2003). When asked to reconcile these statements, respondents would say something like, “Well, I see how that might seem political. But to us it is just networking.”

Concerns about IRS Regulations

As noted above, proponents of nonprofit advocacy and lobbying have long been concerned that many nonprofit organizations are not well-versed in the IRS rules governing lobbying activity for 501(c)(3) organizations and worry that this might serve as a chilling effect for advocacy involvement (Bass et al., 2007). This research revealed that confusion over the rules was indeed very common among homeless service providers in Chicago. However, these misunderstandings did not keep managers from participating in advocacy (as 93% were found to participate), and usually did not hold them back from participating in lobbying either.¹

Data from the interviews revealed that 50% of managers did participate in lobbying at some level, but only 24% responded in the affirmative when asked specifically if they lobbied. In other words, about half of the managers that participated in lobbying were either unwilling to say so, or else did not understand what they did to be lobbying (even though what they later described doing met the legal definition of lobbying). This discrepancy is primarily a result of two common misunderstandings. First, many managers were unsure about what lobbying actually was and so participated in it without knowing they were doing so. For example, when asked if they lobbied, they would say no, and then later talk about a trip they made to the state capital with a group of service providers to talk to legislators about proposed state budget cuts (which is likely lobbying).

Second, many managers noted a specific aversion to the word *lobbying* and preferred not to use it. Instead, they referred to their lobbying involvement as “educational,” “advocacy,” or “public policy.” As one director said, “I like the word *advocacy* a lot better. It doesn’t sound so political. It’s really me talking about something that I’m passionate about . . . Lobbying kind of has a negative connotation in today’s world.” Another was even more descriptive, “You know . . . lobbying, even the term kind of turns my stomach. I mean, I feel like, if I’m Amoco, and need this done so I can

¹The reader is reminded that advocacy is a general term that encompasses many different kinds of political behavior, including educating the public, working with the media, and some communications with public officials. Lobbying is a specific kind of advocacy that is legally defined as attempts to influence the passage of specific pieces of legislation.

make more money, then I need to be lobbying. What we're doing, we're trying to educate them to make right decisions for their constituents, you know, and I guess in a sense that's lobbying, but this is really, I mean, it's our money, and it's coming back to us . . . Lobbying to me sort of has a more greasy feel to it." Almost all managers did make a distinction between advocacy and lobbying, although their definition of lobbying was often vague. Despite their confusion, legally, the definition is quite clear—lobbying is attempts to influence the passage of a specific piece of legislation—and advocacy is a broader term.

About 21% of managers specifically (and erroneously) stated that they could not lobby due to their nonprofit status or because they received government funding. The rest knew that some lobbying was acceptable, but the vast majority of these were unsure about what the spending cutoffs were. They simply felt that that whatever they were doing, it certainly wasn't "too much." For example, only one executive director knew what the 501(h) election was, but he did not bother selecting it because he felt there was no chance that they would spend enough for it to matter. One director, who freely reported involvement in lobbying, said the following when asked about reporting lobbying expenditures: "Well, we don't really have any, so we don't report any, frankly. I mean there's my time, but that's really more, it's public policy work, as opposed to lobbying. It's really minimal, so it's not really worth reporting. Maybe 5% of my salary. And you know, I ain't making a million dollars so . . . (laughs)."

In sum, these managers felt there was a qualitative difference between any lobbying that they might do and lobbying that is done on behalf of corporate interests. They felt their work to be primarily educational, or giving voice to underrepresented constituents. Essentially, lobbying was seen as self-interested. As they didn't see their lobbying work in that light, they did not see it as lobbying. As one respondent noted, when she was asked what the difference was between advocacy and lobbying, "I don't see a difference, but we can't call it lobbying if we do it. . . . Lobbyists get paid. We don't. Bottom line."

The other half of respondents, who did not participate in lobbying, tended to be the organizations who were less involved with advocacy overall. Although some noted they believed it was illegal, they also generally reported they were not interested in engaging in lobbying or did not have the time to go to the state capital (about four hours by car from Chicago). As one manager put it, "When you have a lot of restricted money, it's difficult . . . especially to the degree that it requires travel, because you don't have money in your budget that covers those kinds of expenses, it makes it difficult to accomplish. So sometimes you have to cover those expenses yourself. And depending on how often you do it, it can be expensive." Others simply saw lobbying as a hassle. As one manager said, "I don't really find them [the lobbying laws] to be overly burdensome . . . I think that people can always get around prohibitions and lobby if they need to and they want to. It's just not something that I would care to be involved in, because it would take staff time and resources in order to defend against it."

Thus, overall, misunderstanding the rules or thinking they were more restrictive than they were did not hold managers back from participating. Also, because many managers did not understand what they were doing was lobbying, their belief that lobbying was illegal (even though that is not true) was irrelevant to their participation.

Managers' Motivations to Participate in Policy Advocacy

How involved an organization would be in advocacy was often a decision that lay with the executive director. Almost all executive directors interviewed reported that they themselves conducted the vast majority of the organization's advocacy efforts. Executive directors often reported that other staff members were either too busy serving clients or did not have the necessary expertise. Except in the largest organizations, managers did not feel that resources were sufficient to hire specific advocacy-related staff. Many executive directors also felt that, as the public face of the agency, they were

best situated to head up any advocacy involvement and that they had the greatest access to decision makers and stakeholders. Because of the importance of the director themselves in leading advocacy involvement, their own personal motivation to be involved in advocacy was crucial in determining the degree to which the organization was involved. Also consistent with previous research (Berry & Arons, 2003; Mosley, 2010), almost all managers reported that lack of capacity in terms of staff time and resources served as a primary constraint on their advocacy involvement. What caused some managers to overcome those obstacles and not others?

Data from the interviews revealed that motivation to overcome obstacles and participate actively in policy advocacy is most strongly associated with the executive's professional training and background, not personal passion or better understanding of the legal regulations surrounding policy advocacy. Overall, managers with career paths that were firmly focused on nonprofit administration found advocacy to be more central to their organizations' mission than managers without that professional education and/or experience. Meanwhile, as noted above, understanding of the legal roles did not make much difference in terms of participation. Personal passion did occasionally come up, but was not generally sufficient to overcome the other structural constraints (small size, limited staff) that many organizations faced.

In the interviews "management professionals"—those managers with graduate degrees who had focused their career primarily on administration, not clinical practice—articulated a different set of professional norms and beliefs about advocacy than other managers. Type of graduate degree did not play a role—managers espoused these norms equally with training in social work, business, and law. Managers who had risen through the ranks, instead of focusing their career on management from the start, as well as managers without advanced degrees, commonly saw advocacy as a distinct activity from the organization's primary work in service provision. For these "service-oriented" managers, advocacy was a luxury, to be done when time and resources allowed, but not an essential part of their job. Management professionals, on the other hand, saw advocacy as important for promoting the organization and its agenda, crucial to their success as a manager, and as directly connected to their larger mission. Acting on these professional norms helped their organizations overcome capacity issues because they made advocacy a priority, even when resources were low.

Examples of advocacy-related statements from management professionals include, "We're really an organization that focuses on helping [clients] become independent and sustain independence, and advocacy is an instrument of that machine" and, "We just feel that that's a part of our job, not only to represent [the organization], but also to be involved in establishing policy and ensuring that needs of people who were homeless or previously homeless are being met." These quotes focus on how advocacy can actually promote services for clients, instead of competing with services. By contrast, less professionalized managers often saw advocacy as taking away from services. Although they generally saw advocacy as a potentially valuable activity, direct service to clients took precedence for them. As one put it, "I mean, not that I don't think advocacy isn't important, but . . . if I had \$50,000 I frankly would not spend it on an advocacy person. I'd put it into someone's pocket here, or mouth, or pay rent, or buy [medicine] for them. That's not the way I think we would choose to use money, honestly."

Some of the management professionals intentionally set themselves apart from managers that did not see a connection between quality services and advocacy. They often spoke in business-like terms and focused on advocacy as a vital management tool. One such manager noted, "The other part of your mission is to say you're going to run the best business. You know, you're going to run the best administration . . . And I think not everyone does that—bridging relationships—to the degree that could manifest the success that we've had. And people ask, "Why have you been so successful? How can you do that?" I point to our leadership and vision, and the relationship building that we've done over time. I think that's made the difference for us." From this perspective it is foolish not to be involved because, as another noted, "everything [policy makers] do, every decision they make, is going to make your job harder or easier."

Professional managers also were more likely to build infrastructure and capacity for advocacy within their organizations. This was particularly important for organizations that otherwise faced barriers to advocacy due to their small size or limited budget. One manager reported, "Because we're fairly small, obviously we don't have a lot of staff. We're pretty lean actually. So we've been using interns actually to do [advocacy] and to work with our clients and to sort of get them involved. So we've been trying to tie in some of those pieces through our interns and trying to get not only the staff more involved but also board members as well as clients." Leveraging interns and board members grows the resources of the organization in ways that do not detract from the ability to provide direct services.

Building infrastructure also means building an advocacy culture within the organization. This also helps overcome limited capacity as it removes the burden from the executive director's shoulders and makes advocacy involvement less dependent on the beliefs of any individual director. Overall, while these executive directors still may do the majority of the advocacy work, they find ways to share the load, which builds capacity. The following quote exemplifies this approach: "It's also part of the job description of every single person here, down to the part-time staff people, to be involved in the advocacy effort. Whether it is on a committee of something, or representing the agency out in the community in some way, but it's really something that we weave into everyone's role. Our direct service staff may be more involved in micro, so that's why we add policy advocacy stipulations in all of the job descriptions. We actually have two staff members in advocacy training today."

On the other hand, managers who had risen through the ranks, rather than focused their career on management, often articulated an orientation to service over advocacy. Sometimes this was related to concerns about mission. As one such manager noted, "We can't get too involved in [advocacy] or else we're not doing our main mission, which is not advocacy in the public sphere. We advocate for the clients all the time, but we're not an advocacy organization, so we lend a hand. We participate a little bit and stay in touch, but try not to get too off topic." Another manager preferred to "Leave it to the Chicago Alliance, they have a staff person, that's that person's job to do that . . . I don't think I'm very good at it either (laughs). So I mean, I'm all for leaving things to do for people who are good at it. We do one thing and we do it very, very, well, and that is [provide direct services]. . . . So that's our mission, and we're going to stick with our mission. Advocacy, political advocacy, is not part of our mission. That will help, but I'd rather focus on what we do, and that's case management."

One class of organizations, in particular, was found to be much less involved in advocacy than others. These were the organizations with the least professionalized managers, generally small and with little government funding. Some of these managers were held back because they weren't sure how to get more involved. They knew that their knowledge and expertise was holding the organization back, but did not feel positioned to rectify the situation. One executive director of a small faith-based emergency shelter who had only a high school diploma and very limited interactions with other directors said of increasing their advocacy and lobbying involvement, "From what I hear, all the money that they raised and all that, I would love to do that for [name of organization], but I don't know how to do it."

Beyond issues of capacity and knowledge, however, the leaders of these organizations saw the mission of their organization in a very different way than other leaders. They were overwhelmingly focused on providing services to clients and saw their work as one of charity, even describing what they do as "God's work" or reporting that they were compelled by God to care for the less fortunate. Many were found in faith-based organizations. Their comments about government were mainly that they wish the government would get out of their way or that they had no interest in working with the government. Directors of these organizations often reported that the government only got in the way of the helping process that they had a natural talent or affinity for. Not coincidentally, these leaders often placed responsibility for their client's condition squarely on the client themselves. Their belief that homelessness was an individual problem as much as or more than a structural problem led them

to express that advocacy was for the most part ineffective at solving the true problem. It should be noted that while many of these leaders were located in faith-based organizations, other faith-based organizations had highly professionalized managers that were active in advocacy. Also, the very few leaders that spoke of advocacy in social justice terms were often found in faith-based organizations. Thus, managers in faith-based organizations were just as diverse as those in secular organizations.

Interestingly, the few managers that had business backgrounds but entered nonprofit work near their retirement age, often as a result of being on a board, were also very committed to “service first” and questioned the appropriateness of getting involved in policy advocacy. These second-career managers made statements that indicated they saw nonprofit work as primarily charitable and often felt it shouldn’t be sullied by too much interaction with the government. One manager was representative when he said, “I don’t think that political advocacy is necessarily effective. I think we need to change our perception of homelessness . . . So, that’s when I’m going to the business world, where I have contacts, to try to chance the face of homelessness . . . I think for far too long we’ve relied on government to solve this problem.”

DISCUSSION

This study adds to our understanding of the advocacy involvement of human service nonprofits by refocusing attention on ground-level processes and on managers’ understanding of why and how advocacy should be carried out. Three elements of managers’ understanding of advocacy are addressed: what activities human service managers consider advocacy, the degree to which they understand IRS regulations regarding advocacy, and their motivations to participate.

First, what activities do organizational leaders consider advocacy? This is important information for researchers, as there appears to be a mismatch between definitions used by researchers and definitions held by practitioners, which threatens construct validity in survey research. The findings on street-level definitions of advocacy confirm that managers often have a slightly different definition of advocacy than researchers generally do. Managers in this sample defined advocacy more broadly than most surveys do, including activities that were externally focused but not policy related. At the same time, however, they were also likely to think of some advocacy tactics as simply “networking” or “education.” It is not clear why these differences exist, but it may be that intention, or why a manager is engaging in particular activity, is relevant to them when deciding whether an activity is advocacy or not. Future research should explore these differences more systematically. These findings do imply, however, that researchers need to be very careful when asking managers about their advocacy involvement. There may be no single best approach; depending on their research question some researchers may want continue to use traditional definitions of advocacy, while others may wish to explore advocacy from the perspective of practitioners. The important thing is that definitional assumptions are made clear and decisions are made consciously, with full understanding of the implications for findings.

Second, concerns about IRS regulations did not appear to be a major barrier for managers in this study. Although many were indeed confused about the rules governing nonprofit lobbying, that did not generally stop them from participating in policy advocacy. Advocacy participation rates were very high (93%) and so were lobbying rates (50%). The organizations that lobbied were about evenly split between those that knew they were lobbying and simply didn’t worry about going over the stated IRS limits and those that did not call what they were doing “lobbying,” although it met the legal definition. None of the groups in this study opted for the 501(c)(h) election. Overall, although managers’ confusion does bring up concerns about compliance with IRS regulations, for the purpose of this study concern about IRS regulations was not found to be a major barrier to participation.

Finally, human service managers come from a wide variety of backgrounds (Hwang & Powell, 2009; Smith, 2002). While some come from professional backgrounds and see themselves as

nonprofit management professionals, many rise through the ranks and have limited administrative experience or training outside of their own organizations (Suarez, 2010). Others have low levels of education and came into social services in a largely voluntary way. This study found that executive directors that saw themselves as management professionals and came to their organization with administrative training saw advocacy in a very different light than did other managers. Managers without this background often saw advocacy as detracting from their organization's service mission and thus saw it as a low organizational priority. Given resource constraints, organizations with these types of managers generally advocated at very low levels.

In short, professionalized managers espoused a shared norm that advocacy is an appropriate tool to improve and grow services, and did not believe that advocacy was in competition with those services. Contrary to other managers, these managers saw advocacy as an essential part of their job, not as an additional task to be undertaken only in times of emergency or when time and resources allow. They believed that the political connections built through advocacy participation would create opportunities for growth and provide legitimacy; this was true even for organizations less reliant on government funding. Adoption of these professional norms helped leaders overcome limited capacity, as they simply didn't see advocacy as optional. They found the time and the resources to do it by employing specific management techniques to help overcome limited capacity. They build strong infrastructure for advocacy throughout their agency and often encouraged a "culture" of advocacy where every staff member was encouraged to see advocacy as part of his or her job.

These findings make it clear that managerial beliefs play a crucial role in guiding advocacy involvement. More professionalized managers believe in the efficacy of advocacy as a way to promote their agencies, whereas less professionalized leaders find it to be a hassle or less related to their mission. Beyond being trained to focus on the bottom line, professional leaders have the advantage of sharing a common language with government officials, especially as it has become increasingly common for individuals with expertise in a given field to move back and forth between employment in the public and nonprofit sectors. As advocacy has become institutionalized as a normative way of maintaining funding streams, professionals jump at it, while non-professionals are increasingly excluded from the conversation.

There are, of course, limitations to this work—most notably, its generalizability. It also cannot speak to the relationship between advocacy and improved client outcomes. Future research should investigate the extent to which involvement in advocacy actually makes an organization more effective. However, although tied to one field (homeless services) in a single city, these findings provide an important benchmark against which studies from other fields and other locations may be compared. Future research should take note of the findings here regarding definitions of advocacy, especially when determining wording for surveys. These findings also point to the potential of intervention research, as they indicate that targeted training may help some managers see the wider benefits of advocacy. Finally, as even many clinically oriented social workers become managers during their career, perhaps schools of social work should consider providing more training on management tools across the curriculum.

Overall, this research demonstrates that advocacy is often more integrated into organizations more deeply when its professional utility is emphasized through professional norms. Interestingly, even in the social work-dominated field of homeless services, where beliefs about the need for social justice and wealth redistribution are common, advocacy is not generally spawned from altruistic motives, rather it often stems from professional and managerial self-interest. Thus, strengthening advocacy in this field, and others, may be better accomplished by encouraging managers to see advocacy as a way to balance mission and resource demands, not as a purely mission-driven activity.

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APPENDIX A: INTERVIEW SCHEDULE

Organizational Overview

1. Can you tell me a little about your organization—what you do, who you clients primarily are? Are you faith-based?
2. How is your organization doing in terms of funding, staffing levels, ability to meet your mission, etc.?
3. How would you describe your organization in terms of how structured it is?
4. What is the professional background of most of the staff? What is your own professional background?
5. Can you tell me about what percentage of your budget is comprised of government funding, vs. foundations, private donations, or fees?

Advocacy Overview

1. Even if you don't participate in them, what kinds of activities do you think of when you think about policy advocacy?
2. What about public education . . . do you see that as the same as policy advocacy, or as something different?
3. Do you see any difference between advocacy and lobbying?
4. Do you participate in any of those activities?
5. What is your impression of the IRS rules that govern advocacy and lobbying for nonprofits? Do they keep you from being involved in any specific types of activities?
6. What do you know about what the IRS calls the H election for 501(c)(3)'s that want to be more involved in lobbying?
7. What kind of relationship do you have with government officials or administrators? How often do you speak with them? How do those conversations usually go?

Section B: Only for Organizations Involved in Advocacy

1. Motivation
 - So, you said that you participated in (insert word they used to describe advocacy involvement), what kinds of things do you do that you consider to be part of that?
 - PROMPT: Talking to administrators? Talking to the media?
 - How formal or informal are those activities?
 - How did you come to be involved in (insert word they used to describe advocacy involvement)?
 - Historically, what have been the main goals for your advocacy?
 - Can you give me an example of something you recently did that you would consider advocacy?
 - When you talk to administrators, what kinds of things do you advocate for?
 - What kinds of outcomes do you hope to achieve with your advocacy?

- PROMPT: Are these outcomes more about changes in funding or changes in policy that doesn't have to do with resources?
 - What would you consider evidence of success—both in the short run and in the long run?
 - How successful do you think you have been at achieving those outcomes?
 - Overall, what benefits does being involved in advocacy have for your organization? What drawbacks does it have?
2. Funding arrangements
 - How do you think your current funding arrangements (funding from government sources, foundation sources, etc.) impact your advocacy activity?
 - Do you find certain kinds of funding make advocacy more or less necessary?
 - Do you find certain kinds of funding make advocacy more or less challenging?
 3. Who participates?
 - Who conducts or is involved in your advocacy activity?
 - PROMPT: Mostly yourself? Staff?
 - PROMPT: What about volunteers or board members?
 - When it comes to advocacy, what skills do you think you and your staff are good at? What skills might your organization need to work on to become more effective?
 4. 10-year plan
 - What is your perception of the mayor's 10-year plan to end homelessness?
 - Did you have any role in helping to shape or write the plan?
 - How has the city moving forward with the plan impacted your advocacy work, if at all?
 5. Coalitions
 - Are you involved with any coalitions that do advocacy, like the Chicago Coalition for the Homeless, the Chicago Alliance to End Homeless, etc.?
If yes:
 - How did you come to be involved with them? How involved are you?
 - What are the benefits and drawbacks of membership?
 - How effective do you think they are?
 - If no:
 - How did you make the decision not to be involved with those groups?
 - What are the benefits and drawbacks of membership in a group like that?
 - How effective do you think they are?
 - How involved is your organization in other kinds of collaborations, say, on things like service coordination, fundraising, etc.?
• What kind of an impact have those collaborations had on your decision to be involved in advocacy?
• Have they ever opened up opportunities for you to be involved in an advocacy project?
 6. Clients
 - Are your clients involved in your advocacy efforts? How did you come to make that decision?
 - What do you think the benefits and drawbacks are of involving clients in advocacy?

Section C: For Organizations That Do NOT Participate in Advocacy

1. Motivation
 - What do you perceive as the benefits or drawbacks for organizations like yours when it comes to participating in advocacy? How useful do you think it is for organizations like yours to be involved in advocacy?
 - How did your organization make the decision to focus only on service?

- How likely do you think it is that your organizations will be involved in advocacy in the future? What would it take for your organization to become involved?
2. Funding arrangements
 - Do you think current funding arrangements (funding from government sources, foundation sources, etc.) influence whether or not organizations like yours are involved in advocacy? In what ways?
 - Do you find certain kinds of funding make advocacy more or less necessary?
 - Do you find certain kinds of funding make advocacy more or less challenging?
 3. Participation
 - Do you think you or your staff is trained sufficiently to participate in advocacy if you wanted to be more involved?
 4. Clients
 - What do you think the benefits or drawbacks are of involving clients in policy advocacy?
 5. 10-year plan
 - What is your perception of the mayor's 10-year plan to end homelessness?
 - Did you have any role in helping to shape or write the plan?
 - How does the city moving forward on the plan impact your interest in being involved in advocacy at all?
 6. Coalitions
 - Are you involved with any coalitions that do advocacy, like the Chicago Coalition for the Homeless, the Chicago Alliance to End Homeless, etc.?
 If **yes**:
 - How did you come to be involved with them? How involved are you?
 - What are the benefits and drawbacks of membership?
 - How effective do you think they are?
 If **no**:
 - How did you make the decision not to be involved with those groups?
 - What are the benefits and drawbacks of membership in a group like that?
 - How effective do you think they are?
 - How involved is your organization in other kinds of collaborations, say, on things like service coordination, fundraising, etc?
 • Have those collaborations ever opened up opportunities for you to be involved in an advocacy project?