

***Assessment  
And  
Transformation Roadmap***

League of Women Voters

January 2018

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**La Piana**  
CONSULTING  
*Collaborate. Create. Accelerate.*

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## *Introduction*

One hundred years ago, the United States emerged as a global power and paragon of democracy, and yet, more than half of the adult population was ineligible to vote. The League of Women Voters (the League or LWV) was born out of the 50<sup>th</sup> convention of the National American Woman Suffrage Association (NAWSA) to “finish the fight” to win national woman suffrage and to eliminate other forms of political and legal discrimination against women. Initially an auxiliary to the NAWSA, the League became an independent organization in 1920, six months before the 19<sup>th</sup> Amendment to the US Constitution was passed enfranchising women. The League was formed on the premise that a nonpartisan civic organization could provide the education and experience the public needed to assure the success of democracy. Shortly after its founding as an independent organization, an office with professional staff was established in Washington, D.C.

Unlike most new organizations, though, the League did not start with a clean slate. As a collection of former suffrage organizations at the state and local level, it was nicknamed the “kettle of eels” and began with an unmanageable 69 issues to advance. Maud Wood Park, the national organization’s first President, remarked “[i]t would have been far easier if the League could have built itself first and then turned to carrying out its program, but the two...had to be attended to simultaneously.”

Today, after nearly a century of volunteer driven activism on a wide range of public issues, the League is at a self-proclaimed crossroads. In many ways, the League is severely challenged. Although it remains a trusted household name, many stakeholders cannot describe clearly the purpose of the organization and are unclear about its relevance. The membership is much older and whiter than the population at large, and League membership has steadily declined by almost a third over the past few decades. Although the League has members in every state and in 752 affiliates, its impact is diffused.

Currently, the ideals of American democracy are under attack. Voters are disillusioned; slightly more than half of all eligible voters participate in Presidential elections. Gerrymandering has resulted in districts designed to pre-determine election outcomes. Barriers to voting are being erected to disenfranchise people of color and low-income people. Factual information on issues facing the electorate is increasingly scarce and difficult to access. Decreased emphasis on civic education among young people and adults means that fewer people understand the fundamentals of a working democracy. These make clear that the “fight” remains unfinished. A strong League is needed as much now as it was at its founding.

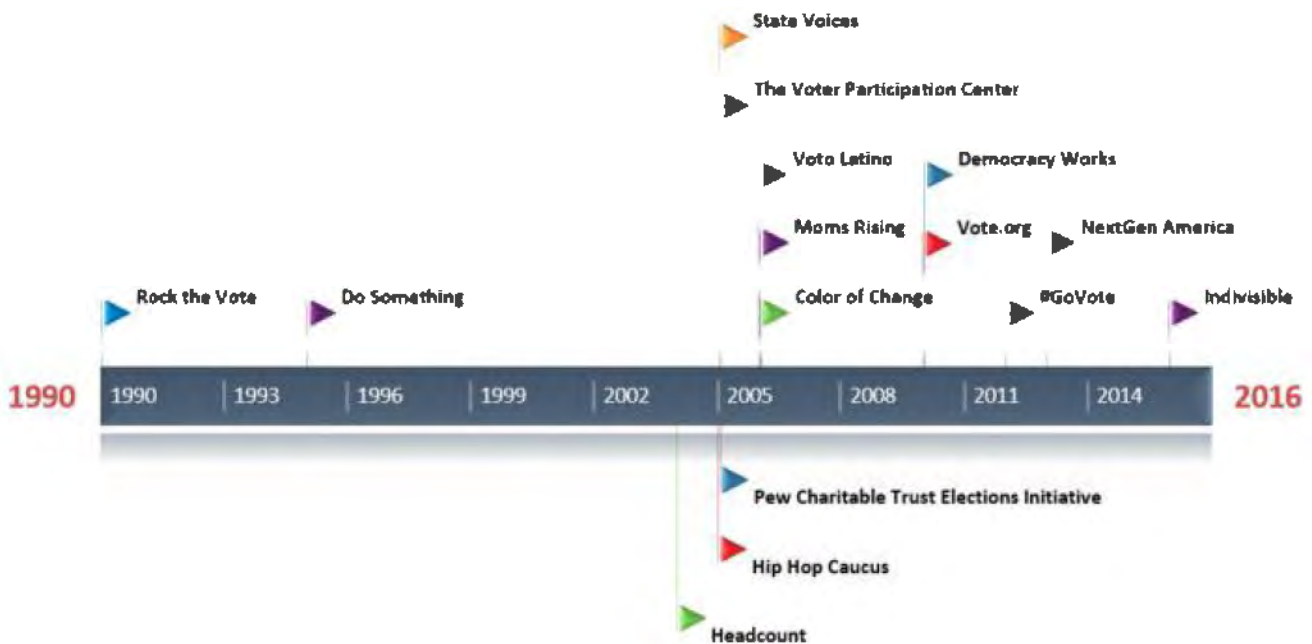
## **A Changing Context**

The League undertakes this Transformation process at a critical time. There is an opportunity for greater mission impact given an energized public, the League’s sound reputation, and the compelling need for its work. Taking advantage of the opportunity requires the League to look both within and outside itself to understand the operating (and competitive) environment in which it works along with its own capacity and will to change.

Evidence of cyber-attacks aimed at vulnerabilities in electronic voting systems, use of social media by Russian operatives to disrupt the 2016 election, and the election of Donald Trump itself have focused the American public’s attention on our democracy. Robert Reich, former Secretary of Labor, recently wrote: “stable democracies require that citizens be committed to the rule of law even if they fail to achieve their preferred policies. Settling our differences through ballots and agreed-upon processes rather than through force is what separates democracy from authoritarianism.”<sup>1</sup> These issues come on top of legislative efforts to restrict access to the vote, to redistrict in ways designed to undermine the democratic process, and other attacks on the fundamentals of the voting process and voting rights.

A panoply of new organizations has come into the space once primarily occupied by the League, Common Cause, the ACLU, and a few others. Some of these new organizations (e.g., MomsRising, Voto Latino, NextGen America) have targeted messages and developed tools aimed at specific demographic groups. Indivisible has grown rapidly since the 2016 election with more than 3,800 loosely constituted volunteer chapters operating under a 501(c)3 umbrella and a set of principles for action outlined in a 23-page manual. The Voter Participation Center focuses on unmarried women, people of color, and millennials as the “rising American electorate.” All are active in voter registration, voter education, and voting rights. Although some (like Indivisible) declare themselves as progressive organizations, others promote themselves as non-partisan and research-based. The number of new organizations, and the volunteers and dollars these organizations are attracting, demonstrate that the issues being pursued by the League are compelling. In this crowded space, it is important for the League to clearly articulate what differentiates it from others in order to attract members and money to accomplish its mission.

*Voting Rights Organizations Established Between 1990 and 2016*



<sup>1</sup> Reich, Robert. “Trump’s Big Loss.” July 30, 2017, <http://robertreich.org/post/163579910780>

The need to differentiate and contemporize the League was raised by external stakeholders interviewed in this process. Most were unclear about the current work of the League network and unable to articulate where and how it is making a meaningful difference in protecting and advancing voter education and voting rights. Although the League enjoyed a surge in the number of new members in 2017, this surge repeats a post-Presidential election “bump” seen in past election cycles that has not staunched a steady loss of members. The lack of clarity regarding identity and purpose may be a contributor to the long-term decline in League membership, depicted below.



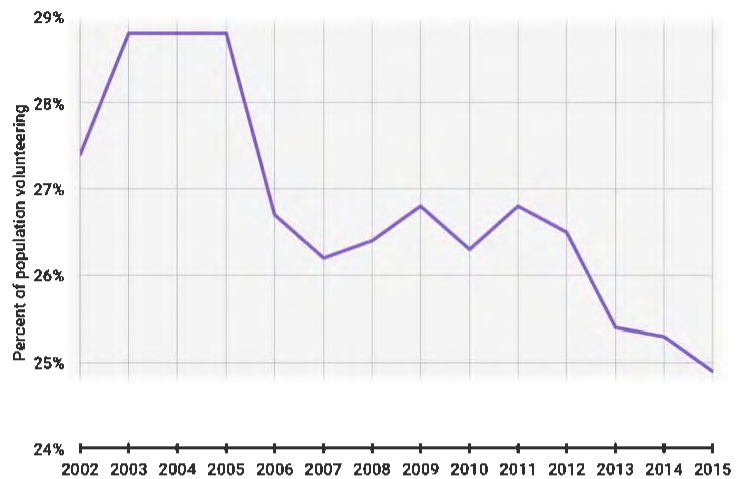
Changes in the US population also present key questions for the League. The US population continues to become increasingly racially diverse. In the past 30 years, the percentage of the population that is white has dropped from nearly 80 percent to 55 percent and four states (California, New Mexico, Texas, and Hawai'i) are “majority minority.” By 2040 the white population will be below 50 percent. The electorate has not kept pace with this change, and many of the organizations noted above share the League’s commitment to creating an electorate that matches the population. However, the League’s membership is overwhelmingly white and older which is seen by many, both inside and outside the League, as limiting its ability to advocate issues primarily impacting people of color and young voters not represented in the League’s membership.

Finally, the nature of volunteerism in the US has changed over the last several decades, another factor that may be having an impact on League membership. Since the Bureau of Labor Statistics began tracking volunteerism in 2002, there has been an overall decline in the number of people volunteering. Furthermore, with more women in the workforce and more families requiring two incomes, the number of

working age women available to volunteer and engage with League work has dropped dramatically. On the other hand, with increasing attention paid to community service in high schools and colleges, there have been increasing numbers of young people volunteering.<sup>2</sup>

Another trend with implications for the League is technology. Collection, utilization, and reporting of data in the public, private, and nonprofit sectors is increasingly an expectation. Data is also being used to drive organizational decisions and to analyze and target messages to audiences. Activist organizations are developing and introducing apps offering virtual and mobile access to information and to take action. Between 2005 and 2016, overall use of social media among all adults grew significantly — with more than 70 percent of all adults reporting regularly using social media.

*Percentage of US Volunteers 2002-2014*



## Where the League Stands

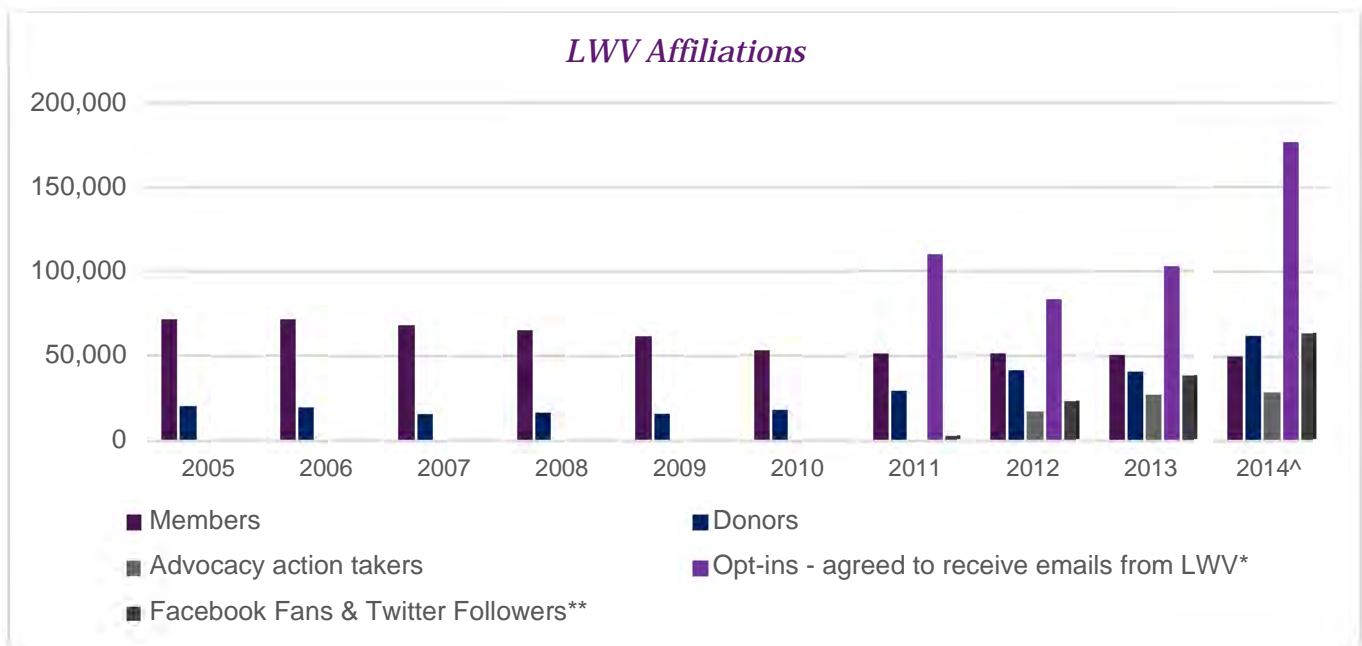
At the most recent National Council, state and national League leaders embraced a call to action for the League network to strategically align behind the mantle of “Defenders of Democracy.” The League is well positioned to pursue this alignment; from its inception, securing and protecting the right to vote *for all* has been core to its mission. Many internal and external stakeholders see the League’s core work being about fair elections, voting rights, voter registration, and voter education. In addition, the League carries on a commitment to broader civic engagement on issues selected, studied, and advocated for by League members at the national, state, and local levels. Although many of these issues are increasingly framed in partisan terms (one external stakeholder said, “the League has moved left by staying where they were”), the League maintains a bedrock commitment to its nonpartisanship.

The League has a respected grassroots network of highly skilled volunteers; an unimpeachable name and “brand” known for being fact based, fair minded, and honest; and the network produces a high volume of work. In the most recent election, the League made significant progress toward ambitious four-year goals set by the national organization. Based on reporting from state and local Leagues regarding their activities and online data collected by the national organization, 200,000 voters were registered (four-year target: one million voters), 4.5 million voters were served on its online Vote411 platform (four-year target: 20 million educated), and 2.25 million voters were protected in various ways, from helping individuals meet identification requirements to beating back voter suppression measures at the state and local levels (four-year target: ten million voters protected). Collectively the League held 9,000 election

<sup>2</sup> Kiersz, Andy. “Volunteering in America Is at Its Lowest Level in over a Decade.” Business Insider, Business Insider, 25 Feb. 2016, [www.businessinsider.com/bls-volunteering-chart-2016-2](http://www.businessinsider.com/bls-volunteering-chart-2016-2).

related events, including 600 forums/debates, and 75 percent of Leagues gained volunteers as a direct result of election activities. However, even with 35,000 media mentions, the League’s work is not highly visible, and its influence is diffused.

Despite the downturn in membership, the national organization has had success in its online and donor cultivation efforts developing “engagers” — donors, those who opt-in to emails from LWV, social media followers, and advocacy action takers. This demonstrates the aforementioned brand strength and reputation of the League.



\*Via web, members, and list buys

\*\*LWV and Vote411 channels

Although there are significant changes needed in *how* the League does its work in order to achieve greater social impact, perhaps the overarching challenge is one of untapped potential. There is a story to tell about the work *already happening* that is just not being heard. Innovation is taking place but not easily shared. (For example, one local League held an election forum attracting an audience of 30. However, by live streaming the forum and making it available to view later the League reached an audience of 3,000! There is no mechanism for this story to be easily shared internally, which means it is also not being shared well externally.)

Adopting a story that is clearly understood externally, aligning the efforts of the extensive network around a narrowly focused body of core work, and developing the internal mechanisms both to share innovations taking place and to aggregate the data necessary to create the compelling narrative are all high priorities for the League network to address in the framework for change.



## *Building a Framework for Change*

With the leadership of a new Chief Executive in the national organization, work on confronting the challenges the League faces has been going on for almost two years. With full recognition of the need for change, the guiding vision from the outset has been to build a dynamic and thriving League ready to move powerfully into its second century in 2020. This work has been led by the national staff and board with participation from League leadership at all levels in multiple activities and gatherings.

### **Key Events to Date**

- January 2016: National leadership, both executive staff and board, embraced the need for change and the LWV US board adopted a strategic framework in the form of the 2016–2020 Strategic Plan that articulated a Change Vision and Goals. While this strategic framework has remained primarily an internal document, it has helped organize leaders' thinking throughout the ensuing process.
- June 2016: At the biennial Convention, the Campaign for Making Democracy Work™ with a focus on voting rights and reforms was approved by Convention delegates, naming five high-level strategies that align with the strategic framework.
- July 2016: Following the 2016 Convention, the Membership, Engagement, and Structure (MES) Steering Committee was charged with looking at how the organization needs to pivot to end its first century in a position of strength and to enter into its second century even stronger.
- January 2017: With funding support from the Rockefeller Brothers Fund, a Leadership Summit was held in Pocantico New York, informed in large part by the work of the MES Steering Committee, and produced a proposed Work Plan that was recommended to the national board.
- February 2017: The LWV US board embraced the essence of the Work Plan for Transformation, but no formal decision was taken.
- May 2017: A Data Summit was held to further explore the recommendations from the January Leadership Summit on transitioning to a common data platform for the entire League that supported League-wide operations and internal communications.
- June 2017: The biennial League Council focused on the Transformation process. The highly participatory convening produced high-level, draft proposed action plans for several focus areas. These focus areas were rolled up into five topics that inform the recommended action plan in this document (see Appendix A).

## Organization Assessment

Funding from The Democracy Fund was secured to test and potentially validate assumptions underlying the plans and priorities emerging from the framework for change, as well as to get fresh input independently collected from both internal and external stakeholders. Based upon its significant experience and expertise working with federated organizations, La Piana Consulting was hired to conduct an organization assessment and work with League leadership to develop a Roadmap for Transformation. The summary of assessment findings below is followed by recommended actions constituting the Roadmap.

### Research Methodology

The assessment was informed by data gathered from a number of sources, depicted below and covered in further detail in Appendix B.



In addition, the consulting team met regularly with executive leadership and convened a Transformation Steering Committee (comprised of national, state, and local leaders) three times, including an extended in-person session. The Transformation Steering Committee served a key role in helping to weave together the multiple streams of discussion and idea generation, noted in “Key Events to Date,” into a single, coherent, and focused framework for change for the three years, 2018–2020, leading toward the League’s Centennial. An extended in-person session with the national board of directors tested and further refined earlier work.

## Assessment Findings

The assessment tested and vetted the outcomes of the extensive discussions and work undertaken by League leaders in the multiple activities and convenings outlined above in “Key Events to Date.” Additional and, in many cases, new data and insights were added through the assessment conducted by the La Piana Consulting team. The assessment findings offered below focus on key aspects of Structure; Processes; People and Engagement; and Purpose and Strategic Priorities.

### Structure

The three-tiered structure allows for an extensive national network of Leagues (50 states, the District of Columbia, US Virgin Islands, Hong Kong, and hundreds of local Leagues) with just over 53,000 dues paying members. However, the structure is cumbersome and has become an impediment in some ways to effective, efficient operations, decision-making, and, most importantly, impact.

- The diffusion of authority since the founding of the organization has prioritized local autonomy and decision-making. This aspect of being driven by the grassroots is an historical strength. However, there are structural and cultural impediments that inhibit the League in consistently marshalling the full power of the network on its national priorities. In an increasingly crowded operating landscape, it is more difficult for the League to express a strong message to gain support for its mission and work. Further, many local Leagues prioritize local issues such as land use, education, or community walkability without considering the connection to the League’s mission.
- The administrative demands on local Leagues, especially small local Leagues, can be burdensome and many local Leagues struggle to successfully address these issues. The La Piana team reviewed all state Leagues (50 states and District of Columbia) and a random sample of 83 local Leagues, including at least one from each state. As of August 2017, 78 percent of state Leagues were in compliance, and 20 percent could readily become so. One state League had its exempt status revoked by the IRS. Approximately 20 percent of independently incorporated local Leagues sampled are out of compliance with IRS filing requirements. These gaps in compliance put the League’s reputation for high ethical standards at risk.
- In the last 23 years, the number of local Leagues has declined along with overall membership by over 24 percent. The number of smaller leagues (those with fewer than 50 members) has increased proportional to the total; 25 local Leagues have fewer than ten members; and 96 local Leagues have fewer than 20 members. The average size of local Leagues has dipped slightly to 66 members. This raises the question of whether there is a minimum threshold at which it makes sense to have independent Leagues. Many states have “units,” that allow local groups to do mission work without the administrative burden of a separately incorporated local League, and newly adopted guidelines allow for new Leagues to pursue a similar, flexible path. This flexibility presents new challenges, though, in making sure that state Leagues are well-informed about and connected to the local Leagues in their state.

<b>Leagues</b>	<b>1994</b>	<b>2017</b>	<b>Change</b>
Less than 50 members	438	357	-18%
50-99 members	332	200	-40%
100-199 members	186	121	-35%
200+ members	87	125	44%
<b>Total</b>	<b>1043</b>	<b>752</b>	<b>-23%</b>
States and D.C.	51	51	
Local Leagues	992	701	-29%
<b>Membership</b>	<b>1994</b>	<b>2017</b>	<b>Change</b>
Total membership	72,657	53,284	-27%
Average number of members per League	70	66	-6%

The MES Steering Committee, the Pocantico Leadership Summit, and break-out groups at Council all considered ways to reduce the administrative burden on local Leagues and to simplify the process of forming new Leagues. A presence in the voting process in as many voting districts as possible nationally is a desirable goal, however, there are many options for how a state League or the national organization could seek to maximize *presence*, without having a local League in every town. The League has many more formal local units, fewer members, and fewer staff than do its peer national federated organizations, as shown on the comparison chart below.

*League of Women Voters Compared to Peer Federated Organizations*

	<b>LWV US/EF</b>	<b>Amnesty International USA</b>	<b>Association of Junior Leagues International</b>	<b>Sierra Club</b>
<b>Revenue</b> <i>(Charity Navigator 2015)</i>	\$7.1 million <i>(for FY 15-16)</i>	\$38.9 million	\$7.4 million	\$109.1 million
<b>Major Funding Sources</b>	Contributions (individual donors), grants, investment income, member assessments (PMP)	Contributions (individual donors – monthly sustainers), grants, investment income	League assessments: AJLI sets the assessment at \$43/member. Local leagues determine the total amount of dues charged to members (above the \$43 remitted to AJLI).	Contributions (including memberships), program services, investments
<b>Geographic Reach</b>	Leagues across the United States, Hong Kong, and US Virgin Islands	Chapters across the United States	Leagues across the United States, Canada, Mexico, and the United Kingdom	Chapters across the United States and Canada
<b>National Staff</b>	24	110 FTE, ~275 part-time canvassers	30	~600 (400 national, 200 chapter)
<b>Local Affiliates</b>	752 Leagues	~500 student and local groups	291 Leagues	64 chapters in US and Puerto Rico, 5 in Canada
<b>Total Membership</b>	300,000+ members and supporters; ~53,000 members	~200,000 members	~150,000 members (AJLI's 291 local Leagues are its "members." Local Leagues have individual members in two categories: active and sustaining.)	3.8 million members and supporters; ~800,000 members

These benchmarked organizations use a combination of top-down and bottom-up influences, a characteristic of many federated organizations.

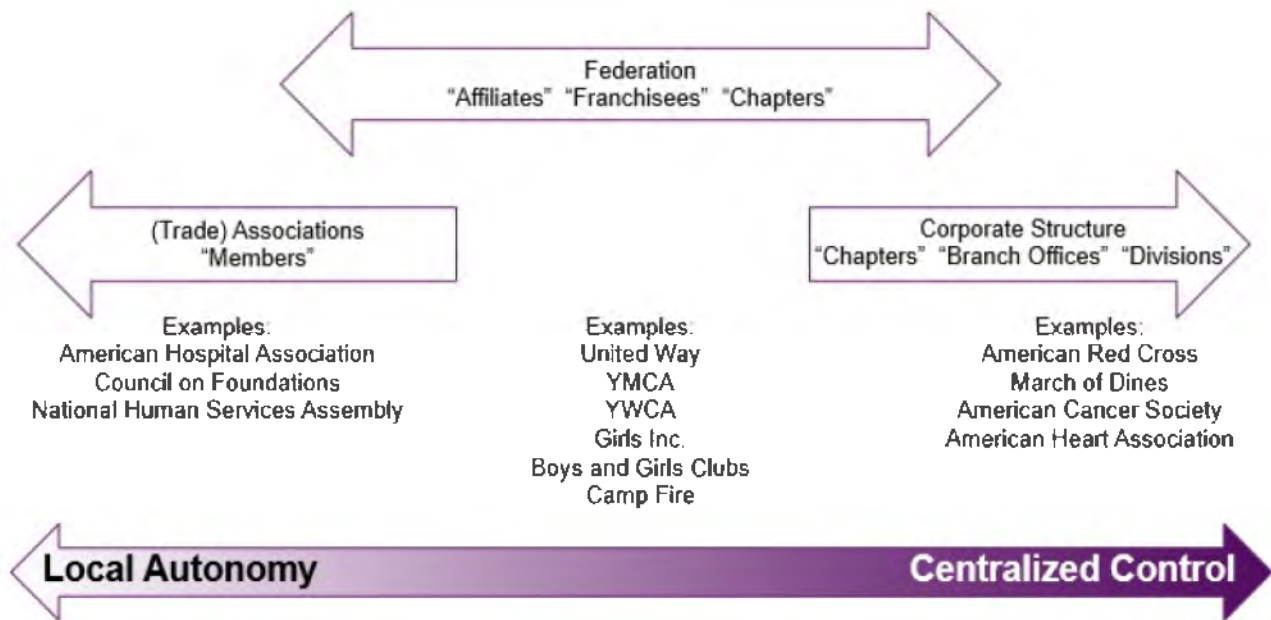
- The Sierra Club determines national priorities and chapters have the option to opt in or not; no chapter is forced to support national priorities, though there may be incentives for doing so.
- Amnesty International USA uses its international conference for agenda-setting. There are multiple levels throughout the organization (local and regional) where issues are brought forward prior to being discussed at the international conference.
- The Association of Junior Leagues International (AJLI) has a limited number of national programs in which local Leagues are encouraged, but not required, to participate. Leagues also propose issue areas for consideration at the international conference on which AJLI takes formal positions. However, the primary focus for AJLI is ensuring that local programs have impact and knowledge is leveraged across the network of local Leagues. AJLI introduced a process now being implemented across all Leagues by which local programs are designed to address community needs with impact.

Determining the best way to optimize network effectiveness is a challenge facing many federated organizations — especially those founded in the early part of the twentieth century. As the sector has become more strategic and sophisticated, federated organizations have had to confront a multitude of questions regarding the balance of national control and local autonomy to ensure brand consistency and mission impact. Other considerations have included: the value proposition offered by the organization to its members; the role of dues in the overall financial model; and the use of technology in connecting and leveraging the federated network for learning and activism. There has also been a move among federated organizations toward greater online engagement, a rethinking of what membership means, and consolidation of affiliates in order to improve performance, accountability to outcomes, and compliance. Federated organizations have also recognized the legal and reputational peril to the full network of allowing sub-par functioning affiliates to continue as part of the federated network. As a result, federated organizations have stepped up efforts to support affiliates through capacity building and consolidation, while using disaffiliation of and/or dissolving affiliates as an option when affiliates are unable to meet network standards.

Although framed as reducing the administrative burden on local Leagues, LWV has been considering how to shift the administrative (and compliance) burden from the local level to the state level. Although some states are already making this shift, making it fully across the network will require greater capacity at the state level than currently exists. Consolidating administrative responsibilities of local Leagues under state Leagues is consistent with a trend among federated organizations, and LWV may need to examine further steps to ensure the integrity of the network.

The graphic below illustrates one of the dynamics at play in federated networks.

## *The Continuum of Federated Networks*



Those on the “local autonomy” end of the continuum tend to bring members together for learning and to promote (or oppose) policies that are important to members. These organizations are primarily designed to strengthen the field so that members can better accomplish their individual missions and visions.

Among the peer organizations benchmarked as part of this assessment, the AJLI values local autonomy in programs while building greater standardization and uniformity in programmatic impact, volunteer roles, reporting, and approach to leadership development. The Sierra Club offers an explicit national advocacy agenda implemented through and with its local chapters, while also allowing local chapters to take on local issues.

Although leaning toward autonomy, the League of Women Voters does not have an explicit position on this continuum, which hampers effective communications and action. For example, the biennial Convention adopted a set of five areas of strategic focus supporting the Campaign for Making Democracy Work™ intended as guidance for the entire League.<sup>3</sup> However, not everyone in the League saw this in the same way and when some demurred and opted out, compliance was not reinforced. Where there are provisions for centralized control, the national organization rarely exercises control. In the course of this assessment, many examples surfaced of formal agreements that crumbled in the face of loud opposition to the decision by a small and vocal minority. An outcome of this lack of clarity frustrates many leaders

<sup>3</sup> Voting Rights and Voting Protection; Money in Politics; Supporting Voting Rights and Voter Protection in the States; Supporting Voting Rights and Voter Protection in Local Communities; Voting Rights and Voter Protection Following Election 2016

and members and confuses external stakeholders left asking what the League is doing and where it stands.

The League needs to get clear about when and on which issues the national organization (board and staff) has the authority to lead implementation on priorities set by the entire League, including capacity-building support at the state and local level in order to accomplish those priorities. Working in alignment around certain priorities and local autonomy on others are not mutually exclusive notions and in many cases, the challenge in this dynamic is in how the work is currently being framed. For example, a local League taking on an issue such as protecting watersheds may present itself as taking a position on an important local environmental issue. In fact, that local League is equipping citizens with the skills they need to fully participate in the democratic process. In this case, protecting watersheds is the vehicle for learning those skills. In another case, gun control or banning gifts to elected officials might be the vehicle. Planting itself more squarely in the middle of the continuum and reframing local work to align to the mission of the League network (and where it does not align, offering support to gain alignment) would allow the League to address some of the fundamental problems it currently faces.

Being seen and experienced as “one seamless League” has been raised in various terms over the course of the Transformation process to date. A key opportunity to support this vision is to make it simpler and easier to join the League as a member. Spirited debate at Pocantico was followed by a proposal drafted at Council 2017 to do just this. Creating a “big red ‘JOIN’ button” on the national website was hailed as a symbol of a unified League while offering people an opportunity to connect with the League in whatever way they might choose. Many of the more than 300,000 national organization “engagers” might be converted to members. However, they may want to continue to engage with the League online and/or on national issues rather than becoming involved at the local or state level. Therefore, there are structural, policy, and operational implications to implementing a “JOIN” button. It also raises questions regarding what membership means in relationship to the structure and within the current League culture. For example, might the League have “members” who pay dues and can be activated around certain federal and/or state issues, but who might never attend a meeting, and “member volunteers” who regularly participate in League meetings?

## Processes

When internal processes work well, they facilitate and support action. When they are cumbersome and complicated, they can be impediments to work flow, communication, and effectiveness.

The “League Way” encapsulates a set of practices that provide a common ground that long-time members appreciate and uphold. League leaders are conscientious about following rules. On the other hand, the “League Way” is frequently cited as “unwelcoming to new members” and an “orientation toward the past.” It is offered as a reason the League doesn’t adapt to new challenges and opportunities, and is seen by many to serve more as a limitation than as a springboard for action. These negatives, however, are as much about how these practices and processes are applied (the culture) as they are the practices and processes themselves.



Fundamental operating systems are limited by overly burdensome processes, an orientation toward manual work versus leveraging technology, and ineffective use of technology for greater social impact and to create efficiencies and cost savings. The national organization does not have clear visibility into the activities or administration of the network. In support of simplifying the structure of the League, technology upgrades and agreed upon reporting processes are needed. The processes for collecting and sharing data on core program work are not as well developed as is needed.

Sharing data has been raised repeatedly as a high priority. To accomplish more effective data sharing (on membership, activities, priorities, League formation, financial operations, etc.) vertically and horizontally, the League's technology needs to be upgraded and a culture of data sharing needs to be nurtured. The desire for improving data sharing suggests a depth of commitment among League leadership at all levels to build this culture.

The technology platform itself has been a barrier to acting on this priority. Several years ago, the League made a significant investment (in excess of \$2 million) to create a platform that would facilitate data sharing and access across the network. The anticipated benefits were not realized based primarily on a decision to use NGO Connect as an enhancement to Salesforce. At the time this decision was made, NGO Connect was being touted as a solution tailored to the needs of large nonprofit organizations and federated networks. For all users, customization provided to be both difficult and expensive and many who purchased NGO Connect have now migrated away from this solution and are using more customizable and flexible add-ons to customize Salesforce. A second issue cited in this assessment regarding the Salesforce platform is the potential cost of user licenses. In researching this issue during the course of this assessment, it was determined that Salesforce has allowed licenses for "user communities" as a more affordable approach to allow access across a large number of users. Rather than scrapping the entire system and starting again, it appears that the League can retain Salesforce and work with an expert consultant (such as Cloud for Good which specializes in solutions for nonprofits) to customize Salesforce to meet the needs of the League.

One of the primary interests of League leaders in improving data sharing capacities is to be able to share what is being learned and "invented" across the country in terms of strategy and League management practices. Intentionally building out this functionality can accelerate learning and continuous improvement.

The orientation towards deep and often time-consuming deliberation on issues of strategy and focus contributes to well-considered, fact-based positions, but makes it very hard to respond in real time. An example cited by internal stakeholder interviewees was the length of time it took for the League to decide to support and take part in the national Women's March in January 2017. While the authority of state and local Leagues to set their own priorities is appropriate in many respects, sometimes rigid adherence to process hampers not only a timely response to emerging issues, but effectiveness in the ability to promote a consistent message about the League. Internal interviews and work with the Transformation Steering Committee and national board also yielded anecdotal information regarding the extent to which the issue selection and study process at the local level discourages new members.

Also noted in connection with the issue selection and study process was the aforementioned challenge in how that process is communicated and implemented. Many cases were cited in which local Leagues used a specific local issue (like protecting watersheds or gun control) to attract new members only to find that these new members were solely focused on that issue. When other members expressed an interest in taking up a new issue for study, the result was resistance and often difficulty retaining members. Emphasizing instead that the League is the training ground for participating in our democracy and its focus is to prepare people to take up *any* public policy issue could mitigate this challenge and place the study process in proper context.

## People and Engagement

In both internal and external interviews, the skill level of volunteer and staff leaders was noted as very high and the passion for the work runs deep. There is a depth of loyalty to the League that is profound. Many volunteer leaders have been in the League for more than 30 years. It is these leaders and members who are responsible for building the trusted brand and reputation of the League, doing fact-based research, and delivering voter registration, voter education, and advocacy work at the state and local levels. Leaders are conscientious and accountable. Contributing to this effectiveness are the well-developed leadership development materials, many of which are online (though regarded as difficult to find on the current website). In recent years the League has begun to engage more effectively through social media with an extensive and growing body of non-member supporters. There are more than seven times as many active supporters as dues paying members.

While it is desirable to have a well-prepared and highly skilled corps of volunteers, some internal and external interviewees noted that this sometimes translates into elitism or snobbism (are you smart enough to be a League member?) and can intimidate or discourage prospective new members. It was also reported that new members can be kept on the sidelines for long periods of time until they are regarded as “ready” to take on volunteer responsibilities. This is seen as contributing to challenges retaining new members, who quickly lose their enthusiasm.

Internal interviewees cited the desire to have greater financial and staff resources to provide the training, technical assistance, and guidance that state and local League leaders could use. Also raised as needs are the processes and technology to better track, manage, and engage both members and non-members, which are currently underdeveloped. The strategy for engagement and the development of an engagement continuum is evolving but incomplete. As noted above in the section on Structure, the comparative dearth of staff to build network capacity, support state as well as local leadership, raise funds, communicate the vision and accomplishments of the League network, and advance the mission of the League hampers the ability of the League network to engage and mobilize its members and supporters.

The question of trust within the League is pervasive. This issue is not unique to the League. All national organizations — nonprofit, for-profit, and public — wrestle with inherent suspicions between different levels of the organization. In the League’s situation, the question of trust may be exacerbated by the long standing and high level of autonomy accorded to local Leagues. More than one Council group noted that better data sharing across Leagues will promote increased trust.

The homogeneity of the membership is seen by many internally and externally as a significant limitation on the effectiveness and credibility of the League. The issue of diversity has been a topic of concern for over 20 years, going back to a Diversity Implementation Task Force in the mid-1990's. This topic was raised multiple times by internal stakeholders and was the subject of several of the break-out groups at Council in June. External stakeholders repeatedly raised the topic, pointing to a troubling gap between the composition of the League's membership and the changing demographics of the population. Furthermore, the topic was raised not only as a *descriptive* observation about the leadership and membership, but also as a *values* question in terms of the level of commitment the League has to fight the disproportionate impact of voter suppression efforts and gerrymandering on communities of color. In the survey of League leaders at the national, state, and local levels, a large majority of respondents reported dissatisfaction with the degree to which the diversity of the membership represents the demographics of their jurisdiction's population and whether "sufficient steps in the recruitment and retention of diverse members" were being taken. While it is clear that there is agreement regarding the need for the League to be a more diverse, equitable, and inclusive organization, it is also clear that reaching that goal will require an unshakeable commitment and strong consistent leadership at all levels of the organization in order to succeed.

### **Purpose and Strategic Priorities**

External interviewees clearly associate the League with voting and elections. Even when stakeholders are not clear about what the League is specifically doing now, they know that voting is at the center of the organization's work. The volume and quality of work taking place "on the ground" across the country is substantial. The League has well-developed expertise in its core programmatic work. External stakeholders also see the network itself as a genuine strength offering opportunities — if properly leveraged and communicated — for greater impact.

The "brand" of the League is seen as a strength internally and externally. Non-partisan and trustworthy, the League's commitment to research-informed positions and to the need for public engagement in the elections process are well known. Alignment around the importance of voting rights, voting access, and fair elections is high.

The current perception of alignment on strategic priorities is not high. In the League leader survey, just under 60 percent of state leaders reported being satisfied or very satisfied that there is "broad consensus at all levels concerning the mission, vision, and purpose of the League." Only about half of local League leaders saw a "clear link between my work at the local level and the national organization's strategic objectives." This lack of strategic alignment is an issue for the League.

Leaders of other national organizations — including those that sometimes have partnered with the League — are in many cases unclear about what the League is actually doing, and more troubling, why it might matter to them. The story about the League's work is neither getting out consistently, nor being told in a compelling way. One stakeholder said, "the issues the League tackles are compelling, but the way they talk about the issues isn't."

The very large number of program priorities can make it hard for the League to present a focused image of its work. In addition, the League does not yet have the communications capacity, nor the internal alignment across League affiliates, to drive a more consistent message and support its implementation at the state and local levels.

The League is no longer one of a few organizations dedicated to a fair elections process. The number of other organizations in all areas of the organization's work has dramatically increased, and changing demographics and the role of social media have only magnified the situation. It is increasingly important for the League to differentiate itself in a clear and powerful way.

## Summary

The need for the work that the League of Women Voters does is as great as it has ever been. However, due to increased competition, failure to adapt to changing times, and weakness in consistently communicating a clear and compelling message about the League's role and the need for its work, it has fallen into a place of questionable relevance. The challenges to the League are several and significant.

1. Uncertain strategic focus
2. Lack of sufficient organizational alignment
3. A structure that is an impediment to organizational effectiveness and efficiency
4. A culture that has failed to adapt to current trends in volunteerism and embrace diverse populations
5. Deficits in organizational capacity, specifically staffing, communications, technology, and fundraising

Nonetheless, League leaders declare they are committed to doing the hard work necessary to bring the League into its second century as a vital force for achieving a functioning and truly representative democracy.

## *Transformation Recommendations: 2018–2020 Roadmap*

Following a path of transformation offers an opportunity for the League network to enter its second century as a renewed, larger, and more unified and effective organization. To lead this change effort will require increased capacity at the national organization and at the state level to drive both the planning and implementation.

Based on the work done by the League to date and the outcome of the assessment, the Transformation process will address the four strategic priorities:

1. Clear strategic focus: A compelling mission, inspiring vision, and core programmatic effort to realize the mission and vision.
2. A healthy League network: Organize and align resources and capacity to optimize mission impact with each level — national, state, and local — taking on an appropriate role.
3. Culture change: Create a culture that is welcoming, inclusive, trusting, and attuned to the needs of today’s volunteers.
4. Sufficient resources: Ensure that the League has the robust technology, communications, revenue, and staffing to effectively and efficiently attract members, supporters, and allies to accomplish its important core work.

### **Roadmap Framework<sup>4</sup>**

These priorities are not separate and discrete. They reinforce and leverage one another. The graphic below represents the relationship of the priorities to one another. A compelling mission, inspiring vision, and core work that accomplishes the mission and realizes the vision attract the interest of “engagers” (those who interact with, donate to, and take action with the League) and compel individuals to join the League as members. Three of the priorities — communications, engagement/membership/retention, and culture — speak to the way the League tells its story; uses that story to communicate its value to multiple audiences (current members, engagers, prospective members, allies, and funders); invites engagers and members to be part of the League; ensures that the League culture and “League Way” are welcoming to all; and makes it easier for people to participate in League activities at the local, state, and national level. These elements are undergirded by technology — to gather and share information — and by a financial model that ensures the League has the resources it needs to accomplish its mission and vision. To implement this model, the League structure is organized and aligned to effectively, efficiently, and appropriately implement the core work of the League at all levels.

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<sup>4</sup> This framework is built upon the Strategy Pyramid developed by La Piana Consulting as part of its Real-Time Strategic Planning (RTSP) methodology. See Appendix C for more on RTSP and the Strategy Pyramid.

WHY

WHAT

HOW



## Clear Strategic Focus

### Our Vision

We envision a democracy where every person has the desire, the right, the knowledge, and the confidence to participate.

### Our Mission

Empowering Voters. Defending Democracy.

### Our Value Statement

The League believes in the power of women to create a more perfect democracy.

### Programmatic Strategies – the Core Work of the League

Defenders of Democracy encapsulates the core work of the League in achieving its mission and vision. At the most recent National Council, state and national League leaders embraced a call to action for the League to claim this mantle which can be implemented through the five strategies below:

Strategy	Desired Outcome
Ensure voter access	Every citizen can vote. There are no barriers to full participation by all.
Mobilize voters	Every citizen does vote. Voters actively participate at the local, state, and federal level.
Provide voter education	The public understands and participates in government.
Ensure voter protection	Voter enfranchisement is protected.
Promote transparency and accountability in government	A fair and equitable system that is accountable to the people.

These strategies offer the League an opportunity to leverage the competitive advantages of the League, including its trusted brand, non-partisan stance, and on-the-ground network for greater mission impact. Recommendations regarding the core work and strategies of the League are described below.

- **Build on the strategic plan and 2016 Campaign for Making Democracy Work™:** The success measures in the Change Vision adopted to support the 2016–2020 Strategic Plan (see Appendix D) all have to do with voting. This work could become the primary lens through which the League’s work is seen and described. Action on other public policy issues is important and serves to engage many members at the state and local levels. However, when the League network attempts to articulate its identity through the long list of issues taken up at the local and state level, the central focus and message become lost. A unified message has to be articulated at all levels that is tied to the strategic focus.
- **Take a stand on the “civil rights” aspects of challenges to election processes and voting access:** From an external perspective, it is unclear where the League stands on combatting the disproportionate impacts of various disenfranchisement and electoral process challenges on low-income people and people of color. Although the League participates in lawsuits and organizes to engage the public around these issues, the lack of clear focus and communications regarding these clear threats to our democracy are again hampering the degree to which the League’s commitment is understood. Furthermore, there may not be clear consensus within the League on what this stand is or why it is critically important to focus on these civil rights issues. This is another extremely important area where building increased agreement and alignment is needed.
- **Reframe work to align to the shared primary focus:** In addition to voting rights and elections, the League works on many issues that help to promote an informed citizenry and active civic engagement on key issues of public policy. Focusing on voting and elections does not render this work out of bounds. Instead it becomes one way that the League empowers voters to fully participate in our democracy. The League should spend less energy wrestling over positions on policy issues and should promote this work instead as its commitment to enable people to fully and skillfully participate in our democracy.

- **Seek partnerships at all levels:** The rise in the number of organizations involved in all aspects of the League’s work presents both challenges and opportunities at the local, state, and national levels. The experience of the League (and its skill) in working in partnerships is uneven. However, there are established processes for developing and participating in partnerships and coalitions that can improve the League’s ability to support, build, and manage partnerships. As part of its capacity building efforts, the League can coach its leaders on ways to use these proven processes in order to become a more adept and valuable partner.

## Strategy Screen

The League would also be well-served by formally adopting and consistently utilizing a strategy screen as a valuable tool to challenge thinking, weigh choices, and facilitate decision-making. Rather than a checklist, a strategy screen should guide discussion of new opportunities or be used to evaluate ongoing work. It is also useful in the context of a network to ensure that the League, at all levels, is making decisions aligned to the same criteria. The following criteria have been developed to consider how strategies within “Defenders of Democracy” will be selected and regularly evaluated.

Is this opportunity, initiative, or strategy:

- The best way to achieve our mission of Empowering Voters: Defending Democracy?
- Leveraging and/or supporting our competitive advantages: non-partisan, highly trusted, on-the-ground network?
- Achievable through human and financial resources we have or can obtain?
- Based on a clearly defined purpose and explicit about outcomes that can be measured?
- Financially sound? Does it leverage funds for greater impact? Does it contribute to financial sustainability?
- Consistent with the needs and expectations of those who are stakeholders in this effort (partners, the public, engagers, and members)?
- Allow us to better live our values of diversity, equity, and inclusion?
- Better suited to be achieved through a strategic partnership?
- Achievable in a desired timeframe?
- Considerate of trade-offs?
- Clear on specific benefits (i.e. growth, fundraising, or visibility)?



## A Healthy League Network

The mission, vision, belief statement, and programmatic strategies (core work) guide the League in *what* it should do and *why* it should do it. Many of the challenges facing the League relate to *how* it carries out its programmatic strategies to achieve its mission and realize its vision. The *how* must begin with building a healthy League network, one in which all Leagues are focused on the mission and vision, aligned with programmatic priorities, and operating with impact and efficacy. At this point, the League does not have the tools and capacity to realize its vision and achieve its mission. Further, fewer members and a homogenous membership organized in smaller Leagues in an era of more competition and changing demographics and volunteer preferences is not a recipe for success.

Several elements of network health have been called out in the assessment process as areas which will require greater emphasis and effort. These include improvements in internal and external communications; engagement, membership, and retention; and an inclusive culture. Underlying these elements must be a strong technology platform to ease data collection and information sharing to leverage the power of the network, and a sound and sustainable revenue model.

### Organizational Alignment and Structure

“One of a federation’s major assets is its organizational infrastructure. Often the national organization has established robust systems and expertise in administration, finance, marketing and communications, membership development, and other key areas. However, depending on their level of independence, individual affiliates may or may not directly benefit. Effectively capitalizing on centralized systems and/or technologies is often part of a federation’s efforts to enhance consistency and collaboration within their networks.”<sup>5</sup>

Alignment in the context of federated structures does not mean centralized control. By their nature, federated organizations, like the League, occupy an intersection between centralization and deep local buy-in and investment; federated organizations also may move along the continuum of local autonomy to centralized control as external conditions and internal needs require.

Organizational alignment has to be built over time, but begins with a sense of urgency and commitment at all levels to the shared pursuit of the mission through a common program of core work and then organizing the structure and systems to serve that end. Formal alignment agreements between the national organization and state and local Leagues can memorialize this commitment but have to be supported by mutual trust and clear communication to nurture that trust, reinforce commitment, and ease periods of uncertainty in the midst of change in order to allow the network to realize its potential.

The League is not alone in feeling the negative consequences of a federated network that is underperforming, in part due to not performing the right functions at the right level in the right way. In recent years, a number of federated organizations have recognized and acted on the need to better align

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<sup>5</sup> “Internal Collaboration and Restructuring in Federated Nonprofits,” La Piana Consulting, November 2016

and assign roles and to build the appropriate capacity to support those roles. These examples offer insights to action steps that work:

- Girls Inc. recognized that its “hands off” approach was eroding its affiliate network and limiting its impact (it had no story to tell about what Girls Inc. was accomplishing). As a result, it was having difficulty raising money and was struggling with old technology, time-intensive paper-based systems, and a culture that was not focused on outcomes. Over a five-year period and with a new CEO and motivated, re-organized board, the organization developed a program delivery framework aligned to a specific set of outcomes for girls; a regional approach by national to affiliate capacity building; a refreshed brand and website; a new learning portal with well-organized and fresh content; a new advocacy program and staff; and a new technology platform.
- YMCA-USA had acquired an unwanted reputation for “swim and gym” that belied its deep roots as a community creator and community builder. Like Girls Inc., it underwent an extensive rebranding effort and reorganized its associations around regional ‘hubs’ that provide fundraising, back office, and other supports to local associations. It organized and refocused its program around three core pillars (youth development, health living, and social responsibility) and made “living our cause” an organizational mandate.
- The Camp Fire affiliate network was collapsing in part because local affiliates were highly invested in continuing Camp Fire Club programs. These programs required a significant investment of volunteer time to deliver, in a highly prescribed manner, a program that was attracting fewer young people. Summer camps that had relied on Club programs as feeders were not attracting as many campers, which contributed to lower revenue and deferred maintenance. A new CEO recognized that Camp Fire had to change to reflect the preferences of today’s volunteers and young people. Like the other examples, a brand refresh was used as a vehicle to engage in deep discussion throughout the Camp Fire network of its value and the “brand experience.” In the early years of the turn-around, a number of affiliates lost their charters, camps were sold, and the decision was made to phase out support for the Club program. At the same time, new approaches to evaluating market opportunities were adopted, the affiliate network was professionalized, and the national organization raised money to build capacity at the national and affiliate level including a youth development framework, external evaluation, and an online learning and communication platform.

In each case, although in different ways, the national organization in the examples above rallied the network around transformative change by taking the lead on the key functions typically held by the national organization in a federated model:

- **Brand stewardship**, not just ensuring consistency in the look of the brand, but in ensuring and communicating consistency in the brand experience;
- **Affiliate chartering and standards**, to protect the integrity of the network, including compliance with regulatory requirements and organizational values and practices;
- **Strategic guidance** (and leadership) in setting overall direction for the network;
- **Information exchange** to build capacity and create consistency;

- **Spokespersonship** and advocacy on behalf of the network; and
- **Expertise and resources** to improve performance and impact.

A strong national organization carrying out these roles — and the value proposition they represent to the federated network — are key to a healthy and successful federation. A strong national organization does not diminish the power or importance of local affiliates or chapters as they deliver on the mission work of the organization. In fact, alignment to strategic guidance and leadership at the national level when combined with expertise, resources, and brand stewardship improves the ability of local affiliates to realize the organization’s mission. For those organizations that have a national, state, and local structure (the Sierra Club is an example), the national and state organizations often share responsibility for providing expertise and resources, facilitating the exchange of information, and supporting the core work of local affiliates.

An option for the League is to strengthen the role and capacity of state Leagues and encourage a shift in some administrative functions from the local to the state level. Some state Leagues are already serving as the corporate umbrella organization for local Leagues operating in their state. This move lowers the administrative burden on local Leagues and has the double benefit of allowing local Leagues to focus primarily on mission-focused work while increasing the timeliness, efficacy, and completeness of everything from tax filings to reporting on voter registration, media hits, and membership.

The challenge in implementing a “strong states” approach is that not all states are prepared to take on additional administrative duties. Half the state Leagues operate with no staff and 60 percent have operating budgets under \$50,000. Alternatives to address these weaknesses include financial support from the national organization to build greater capacity at the state level to creating regional administrative “hubs” for groups of adjacent states. Rethinking the role of state Leagues and the relationship to local Leagues is one aspect of reimagining the structure of LWV. Another is rethinking the role played by the national organization and national board. A recommendation that has surfaced in the events leading up to Council as well as from internal and external interviews is to increase the level of support national staff provide to state and local Leagues. As the national organization has begun to rebuild staff after reaching a low point in head count a year ago, proactive guidance and technical assistance is beginning to be delivered in the areas of strategy, advocacy, communications, and fundraising. The state and local Leagues are hungry for, and appreciative of, this support. For this to continue and expand, the national staff and board need to assume a clear leadership role and take responsibility for the effectiveness and health of the organization as a whole. Leadership is a relationship — so, in addition to continuing to “step up” as the national organization (board and staff) have in the Transformation process, state and local Leagues need to be willing to accept leadership.

The League also has to put in place two forms of capacity building supports. One is a Knowledge Management System (KMS) that provides a curated and searchable online library of resources. This will reduce the amount of time spent searching for or (worse yet) re-creating resources. Most federated networks have moved to not only a well-tended KMS, but also online learning opportunities such as regular “lunch and learn” webinars. Another is a regionally distributed team to better provide “technical

assistance.” All of the benchmarked organizations and other federated organizations cited in this roadmap have such regional professional capacity building staff.

In all of this, there is a specific role for the national board of LWV in strengthening the League as a federated network. Internal stakeholders, including several current board members, voiced a desire for the board to move from an operational focus to a more strategic role. Everything from the selection of new board members, to committee structure, to the role board members play in the life of the organization needs to be aligned, in partnership with national staff. An important step in advance of the upcoming Convention is to strengthen the nominating process so that it operates more strategically. The Nominating Committee should continue the best practice of consulting with current members to determine which are prepared to continue to serve on the board in order to ensure there is some continuity and identify where there are gaps in priority characteristics (skills, expertise, demographics) for filling any anticipated vacancies.

Through the survey, Leagues leaders at the local, state, and national levels reported substantial confidence in the ability of their governing boards to carry out fiduciary duties. However, at all three levels there was some disconnect about the clarity and alignment of *strategic* priorities across the national, state, and local levels. The national board needs to work with state and local League leaders to define and gain alignment on strategic priorities. Achieving organizational alignment and using the federated structure as a high performing vehicle serving the mission requires not only the definition of roles at each level but implementation of changes in other areas — most especially in the core driver of culture.

Three key areas where performance can be improved are in communication, creating an inclusive culture, and the engagement of prospective members and their conversion to and retention as members. Of these, culture is the most difficult and important element to address as part of an organizational transformation and capacity building process. This is especially true in a federated structure where change has to reach all parts of the network. For the League, the connections among culture, communication, and membership are strong. Creating a more open, inclusive, and welcoming League at all levels requires skilled internal and external communication which should combine to drive success in engagement and increases in membership.

## Culture Change

***“Culture eats organizational strategy for breakfast, lunch, and dinner.” — Peter Drucker***

There are many dimensions and aspects to culture, some visible through the way in which the League at all levels operates — its systems, structures, programs, and stated mission and goals. Other aspects of culture are less visible but felt in the way conflicts are managed; in managerial style; and in the values, perceptions, attitudes, and feelings that color the way in which League members and staff interact. The “organizational culture iceberg” depicted below is often used to illustrate those aspects of culture that are seen and unseen in the daily experience of external stakeholders who interact with an organization and among those within an organization.

## Organizational Culture Iceberg



While the League's culture is in many ways an asset in terms of loyalty and norms of dedication and commitment, there are aspects of League culture that have been identified as running counter to the League network's desire to grow its membership and impact. Within the realm of culture, there are specific actions that can be taken over the next three years to strengthen the League for greater mission impact.

### Commit to Diversity, Equity, and Inclusion

LWV has identified its lack of racial, economic, and social diversity as an impediment in achieving its mission and as a barrier to greater impact and growth, a view reinforced in the assessment by external stakeholders. The recognition of the need for change has prompted many state and local Leagues to begin taking steps to build a more diverse membership, and diversity, equity, and inclusion has been a topic of discussion among both the board and staff of the national organization. The need for resources and support in this journey toward being a League that fully reflects the demographics of the geographies it serves has been noted and it is time for a national, intensive, and visible League-wide commitment to change. As an early step in the change process, the League CEO has an opportunity to join with the CEOs of a number of major corporations and nonprofits in pledging to the CEO Action! for Diversity and Inclusion. This effort, started by PriceWaterhouseCoopers (PWC), has brought CEOs together in a

learning and support network committed to ensuring their organizations are more diverse, equitable, and inclusive — sharing resources and practices such as those on the PWC website.<sup>6</sup>

The first public step is for the CEO to sign onto the three-point pledge below, as a demonstration of the League network's commitment:

1. We will continue to make our workplaces (i.e., League organizations) trusting places to have complex, and sometimes difficult, conversations about diversity and inclusion.
2. We will implement and expand unconscious bias education.
3. We will share best — and unsuccessful — practices.

Prior to signing on to the pledge, the national organization has to begin its own work tapping resources and expertise to be able to model the actions that will have to be taken throughout the League network. The national board and staff will enlist state Leagues that are taking or beginning to take action to address their own diversity as “innovators” and “early adopters” in this change process.

It is worth noting that while much of the emphasis and proposed actions have focused on diversity, and to a lesser extent, how to make the League more inclusive and welcoming, there has not been as much attention to equity. Often equity is understood as providing a level playing field for people of all identities. The desire to improve outcomes for all should not be confused, though, with treating everyone the same. Equity for all requires a targeted, perhaps greater investment in communities of color and others that have borne the brunt of structural under-advantage accumulated over time — including women. Cultivating new relationships and engaging in adaptive and creative thinking regarding how to “grow the pie” so that all realize the same access and treatment, also requires an honest reckoning with the reality of structural over-advantage, accumulated over time. Righting this balance can be perceived as “reverse inequity” to those who have enjoyed unchecked privilege in the past. The League has an opportunity to lead with compassion and conviction in countering the criticism that is likely to come, particularly from those who do not understand equity or perhaps who benefit from its absence.

An approach that tackles equity as well as diversity and inclusion is essential to the League's ability — and credibility — in realizing its vision and achieving its mission. Arguably, there cannot be “a democracy where every person has the desire, the right, the knowledge, and the confidence to participate” without equity. The value statement “the League believes in the power of women to create a more perfect democracy” speaks to creating a more equitable democracy — at least in one dimension. Going forward, the League will need to adopt a bottom-to-top and top-to-bottom action agenda to advance diversity, equity, and inclusion in its own ranks as well as in its core work.

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<sup>6</sup> PriceWaterhouseCoopers: <http://www.pwc.com/us/en/about-us/diversity.html>

## Build Greater Trust Across All Levels of the League

Trust has been repeatedly identified as an internal barrier to effectiveness. Responses to the survey of local, state, and national leaders administered as part of the assessment support the often-heard contention that lack of trust is of concern for some. However, a majority of respondents indicated they trust that League leaders “do all they can to support the success of their League counterparts throughout the League.” This notion of good intent is part of the five elements of trust identified by researchers Mishra, Tschannen-Moran, and Hoy who defined trust as “one’s willingness to be vulnerable to another based on the confidence that the other is benevolent, honest, open, reliable, and competent.” Probing in interviews and meetings on the underlying contributors to lack of trust yields little beyond frustration regarding responsiveness. What is being characterized as a lack of trust may more accurately be a lack of capacity that prevents various parts of the League from performing reliably. To address this, three strategies for action should be undertaken:

1. Strengthen the national organization’s capacity. The national organization is severely understaffed in comparison to its peer organizations, in comparison to its historical staffing levels, and in consideration of the role it must play in a healthy League network. To fulfill its role and to be a reliable and trusted resource and partner with state and local Leagues, the national organization must be staffed to improve online access (better organized and more accessible information), through the judicious addition of staff in key functions such as communications and technology, and in the creation of a small field staff team to support capacity building at the state level.
2. Analogous to the need for greater capacity in the national organization, state League capacity must be strengthened to provide the administrative, communication, and programmatic supports needed by local Leagues.
3. Making the shift from labor intensive paper-based systems to the use of technology to support more seamless and efficient pathways for better “real-time” information flow.

## Adapt the “League Way” to Current Needs

The “League Way” represents a range of established practices, both explicit and implicit, that guide how work gets done. In many ways, the “League Way” continues to serve the organization. For example, the commitment to ethical standards, the thorough vetting of information that is shared with voters, and the cultivation of a deep understanding of issues all support the positive reputation of the League. However, the “League Way” has negative manifestations including rigidity, exclusivity, and “moral superiority.” Internal interviewees cited instances in which new members were turned off or turned away because of the behaviors associated with these negative aspects — most of which are cultural. To mitigate against these negatives, changes are recommended in four key areas: National Board Nominations, Membership, Fund Development, and Program Planning.

1. National Board Nominations: The separation of the Nominating Committee from the national board is designed to bring objectivity and prevent the negative consequences of a self-perpetuating board which can include insularity and “cliquishness.” On the other hand, the

separation can create a knowledge gap regarding the governance needs of the organization. It is recommended that the nominations process be revamped to encourage more deliberate selection of candidates using explicit criteria such as skills, expertise, contribution to age and racial diversity, and governance experience, in addition to the current apparent emphasis on League tenure.

2. **Membership:** Trends in volunteerism, online activism, and increased competition from new organizations engaging in voter rights and voter education combine to compel changes in the way the League thinks about its membership. In order to promote greater engagement with the League, it is recommended that the “Join at All Levels” change in membership structure be adopted. This is a major change in the current “League Way” that prioritizes members who join and primarily participate in the League through their local League structure. Specific actions to be taken to implement this change are included under “Engagement, Membership, and Retention.”
3. **Fund Development:** All federated organizations confront similar challenges in ensuring there are appropriate resources at all levels of the federated structure to support the work of the network. Currently, fundraising is largely left to the individual League entity (national, state, or local). Variations in fundraising skill and opportunities at the local and state level is one contributor to variations in capacity at the local and state level. The lack of a communications narrative that ties together work at the national, state, and local levels is another challenge in fund development. To raise funds for additional capacity at the state and local levels, it is recommended that the national organization take the lead in developing the national narrative or case for support and use that in exploring opportunities for joint fundraising between national and state Leagues. (See “Communications” and “Finance.”)
4. **Program Planning:** The current program planning approach has several elements that can be not only cumbersome, but also may be ineffective. Information gathered in the assessment and earlier discussions among League members and leaders cite this as one area where the League is sometimes perceived as exclusive and rigid. Some Leagues use the program planning process as a litmus test for commitment. Those who believe in and want to associate with the League on national rather than local issues, for example, or who seek volunteer opportunities other than policy study are not seen as bringing as much value in the view of some League leaders. Some Leagues have difficulty saying “no” to members who suggest a pet project. There is also not a consistent approach to embedding impact and evaluation components in the process. Developing more flexibility regarding involvement and roles of members; having simple checklists or screening criteria that prompt Leagues to be more inclusive (and create a vehicle for saying no to pet projects); and improving access to information across the League network in a curated knowledge management system are all vehicles to improve this process. Beyond process improvements and culture change, moving the mindset around program planning from framing positions on issues to developing greater skills in civic participation and the democratic process would place this aspect of the “League Way” in the proper strategic context.



## Engagement, Membership, and Retention

The way “membership” is understood needs to evolve within the League. Members, even “dues paying members,” do not all attend physical meetings. What is most important is that the League is able to reach and engage more people to accomplish its work. This is the reason that “membership” is included in the above “Adapt the League Way to Current Needs” section; the League’s very concept of membership needs to expand to include all those who are choosing to engage in an increasing number of ways. To increase membership, as well as the number of individuals engaging with the League in multiple ways, three guiding goals are recommended:

1. Involve as many people as possible in the League: balance “thick” and “thin” engagement.
2. Structure engagement opportunities to ensure that the League can capture contact information to continue and deepen member and non-member engagement.
3. Structure opportunities and communications with individuals to facilitate their entry into leadership roles.

An element of a comprehensive strategy to build engagement, membership, and retention is the proposal to implement a “Join at All Levels” one-click system. This is a structural change with immediate and far-reaching impact on how the League presents itself to the world, how newcomers experience their relationship to the League, and on the relationship between various levels of the League. It will help reduce the “transactional” nature of the relationship between state and local Leagues and the national organization, because there will only be “one,” unified form of membership. By allowing individuals to choose among more options for participation, this change should respond to the desire for multiple avenues for engagement and better allow the League to compete with other organizations for new members. As noted above in the “Culture” section, this change will also require adaptation on the part of state and local League leaders in how they think about membership. Ultimately, this is not about what the League needs or wants, but about recognizing that members should be able to make decisions regarding their involvement and the League should have a range of roles that members can play to accommodate a variety of interests.

One goal of this change is to create a consistent access point, and message, for all new members and an automated system for managing all new member registration and payments through a single-entry point managed by the national organization. “Join at All Levels” implies the following through automation:

- Seamless experience: When a person joins, they immediately become a “member” of the national, state, and local Leagues with local and state membership based on where they live.
- Data sharing: The individual’s contact information is immediately shared with all three levels of the League.
- Portability: When someone moves to a new state or community, their League membership is “transferred.” The League is able to maintain the relationship with the member.

Implementing this “Join at All Levels” membership is deceptively complex. In addition to culture change and the need to develop a significant technology infrastructure, this system has financial implications noted in the “Revenue Model” section below.

## Communications

There is a strong connection between communications — both internal and external — and culture change. The style and content of internal communications — what is shared, by whom, and in what manner — are a manifestation of many of the aspects of culture noted in the “organizational culture iceberg.” External communications offer a window into organizational culture for those who interact with the League.

League members, with a strong sense of “the way we do things at the League,” are sometimes seen as communicating with fellow League members and League leaders in a manner that is negative, harsh, and critical in a way that is not appropriate or helpful. League leaders also noted in interviews and subsequent Transformation Steering Committee discussions that new members are often turned off by the way in which League members speak to them — questioning their authority, challenging their right to offer ideas or opinions, or criticizing their participation. New members are not the only individuals experiencing internal communication as negative. Many examples were offered of email, voice-to-voice, and social media communications peppered with harsh and judgmental statements questioning the competency and intent of leaders, members, and staff. The many examples of harsh or inappropriate internal communication offered in the course of the assessment indicate that a formal statement of the norms that all members and staff are expected to follow in internal communication could effectively undergird an effort to shift the League toward consistently civil, appropriate, and inclusive communication consistent with the League’s values.

There are other simple practices the League can and should implement. Doing a better job of sharing stories of success within the League network can both accelerate adoption of approaches that work while also creating a more positive narrative and tone around the work of the League. Even something as simple as beginning every League meeting with a “mission moment” (an example of how the League is making impact) can make a difference in shifting the tone from negative to positive.

A more positive narrative and tone will not only benefit internal communications, but can support a unified and coherent story in external communications by gathering information from local and state Leagues that can be “rolled up” into a national story about what the full network is doing. The creation of a compelling national narrative is essential to developing a unified League identity, to attracting and retaining members, and to supporting the League’s fund development. All League members should be equipped to offer “in a nutshell explanations” of why the League matters, its accomplishments, and its goals.

## Sufficient Resources

In order to realize the mission and vision of the League, there is an incontrovertible need to increase the financial and human resources available to build capacity, support the information and communication needs of the League, to create greater efficiencies, to attract members to volunteer leadership roles, and to ensure sustainability and stability. Many organizations — like the League — with a history of relying on volunteers to carry out the administrative and programmatic work of the organization have difficulty making the transition to adding capacity through staffing certain roles traditionally held by volunteers, replacing paper systems with technology, and contemporizing systems, functions, and structures. These shifts are needed to respond to the changing context noted in the assessment. The League faces a much larger set of competitors exhibiting skill in communicating their value to the public in a manner that is attracting members and donors. This is happening as volunteer preferences and the demographic composition of the country are changing.

The highest priorities for the League in adding capacity — including staff resources — are in technology, communications, and fund development.

## Technology Infrastructure

Technology infrastructure is not a new topic for the League, but to accomplish the change envisioned in this roadmap, a robust technology infrastructure is essential. The January 2017 Leadership Summit identified the need for a common database to address the needs of LWV, and established the objective of developing draft business rules for data sharing across the League. LWV convened a Data Summit on May 16-17, 2017. Participants included six state League representatives and members of the national staff. The group discussed and arrived at a series of recommendations as well as a proposal for next steps.

- The League should have one organization-wide, comprehensive database of all stakeholders and interactions, shared across national, state, and local Leagues.
- A fundraising revenue-sharing model should be developed and implemented to enable joint fundraising efforts that maximize revenue by fully utilizing resources at the national, state, and local League levels. The model should offer incentive and safety for data sharing.

### *Underlying Factors for a Successful Data Sharing Framework*

- Recognize and allow for multiple avenues and entry points for stakeholder interaction (i.e., those who want to affiliate with LWV, but not join as formal members) — select technology solutions that enable stakeholders to interact with the League however and wherever they choose.
- Eliminate duplicative and redundant data entry. Only enter data once, whenever feasible.
- Leverage the shared data and supporting technology to allow LWV to shift administrative responsibilities to where they can be most efficiently and effectively handled, and align resources appropriately.

## *Guiding Data and Revenue Sharing Principles*

- **Constituent-centric.** The model must uphold the intentions of the donor. LWV staff and volunteers are responsible to the constituent and not to the national organization or the local affiliate.
- **Fair.** The model must be fair to all participants — constituents (programmatic and philanthropic), state and local Leagues, and the national organization.
- **Open and transparent.**
  - The model should be clear, well documented, and accessible to all interested parties.
  - All relevant data should be integrated and shared within the organization.
  - Honesty and transparency is the best policy to fully engage constituents and attain the best results.
- **Win-win-win.** The model should serve the needs of constituents (programmatic and philanthropic), state and local Leagues, and the national organization.
- **Right incentives.** The model should provide incentives for collaboration between affiliates and between affiliates and the national organization.
- **Supports strategic growth.** The model fuels and funds LWV's ongoing investments in becoming more constituent-centric (e.g., enabling LWV to raise more money to serve more people).

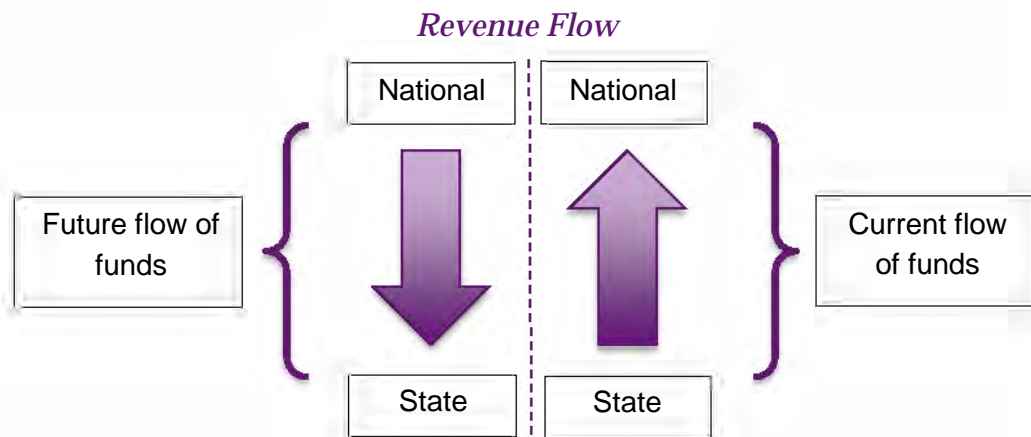
These principles and underlying factors, described above, provide a framework for decisions regarding the technology platform that will allow the League to achieve its data collection and sharing goals and to support fundraising and revenue-sharing. The current software used by the League — NGO Connect layered on Salesforce — has proven insufficient to achieve these goals. While Salesforce is broadly used and regarded as a flexible foundation on which customized solutions can be built, NGO Connect has been abandoned by a number of the larger organizations which acquired it. It appears that the national organization can retain Salesforce and work with outside experts to ensure it is customized to meet the League's needs. This will have to be accompanied by the addition of staff with the expertise and experience to lead a robust technology function.

## **Communications**

New and more robust tools and capacities are required to allow the League to more effectively and consistently communicate with both internal and external audiences. The new website launched by the national organization is a starting point in strengthening how the League presents itself. Additional staff will need to be added to bolster a social media operation, to develop communications specifically targeted to various audiences (for example, members, policy makers, and the public), to generate messages to support members in speaking about the League in their communities, and to ensure the League's voice is heard in empowering voters and defending democracy at the local, state, and national levels.

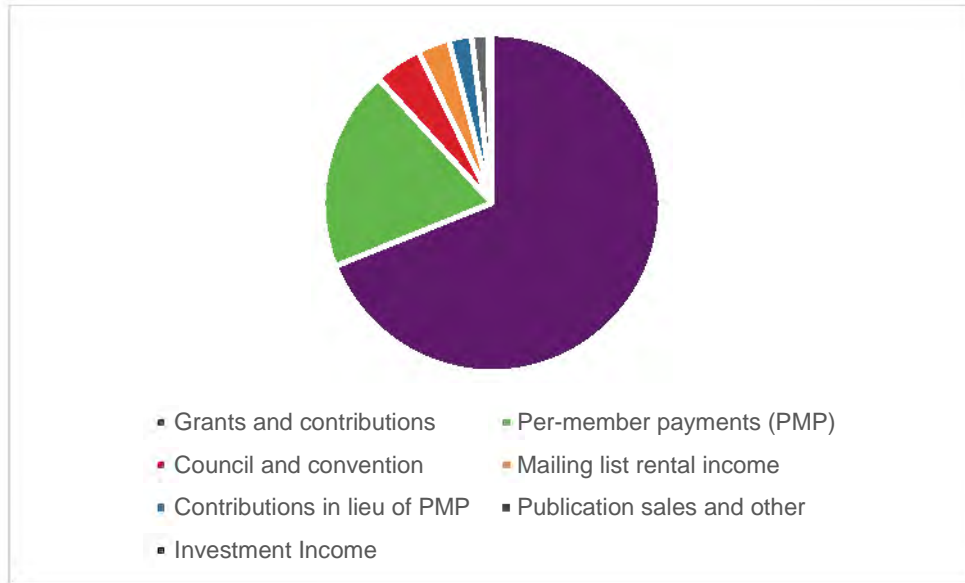
## Fund Development and Sources of Revenue

LWV will be taking an important step in implementing the recommendation to adopt the “Join at All Levels” approach to collecting and disbursing membership revenue. This proposal places responsibility for collecting and managing payments at the national level with distribution to state Leagues of an agreed upon share of funds. State Leagues would then decide, based on local circumstances and needs, whether to make a further distribution to local Leagues or whether to retain funds in order to support services being provided to local Leagues. Although consideration has been given to piloting this proposal, the League needs a technology platform in place to support maintaining membership rolls, tracking payments, sending reminders regarding membership renewals, and changing the flow of revenue, as described in the graphic below. Therefore, doing a national roll-out of this change makes more sense so that the resources to support this membership model are available.



Implementing this change in the flow of funds and standardizing dues are core to efficient and effective operations in the national and state organizations and to build organizational capacity at those levels to support local Leagues. This change in the flow of funds has gotten attention because it requires culture change. Member dues are an important, but not the largest source of funds for the national organization as displayed in the chart below (data from the consolidated audit report for the year ended June 30, 2016).

## Revenue and Support



The future health of the League network requires a more robust fund development strategy and the staff, communications capacity, data, and technology to execute on that strategy. The national organization is already taking steps to develop additional and deeper relationships with grantmakers and major donors. A stronger communications function able to craft and disseminate an inspiring narrative about the League's mission-related work and a growing membership will allow the League to make a more compelling case for support. This case is needed not just to build capacity for the national organization, but to raise funds that can be re-granted to state and local Leagues in order to participate in pilot projects or other core mission work of the League. To accomplish this, the national organization should take the lead in exploring opportunities for joint fundraising between the national organization and state Leagues. These efforts will need to be grounded in a set of principles similar to those developed around technology.

## *Appendix A: Playback Groups and Priorities – Council 2017*

Overarching theme: Function as one seamless and nimble League.

### **Culture**

- Enhancing trust
- Internal culture change – “League Way”
- Embracing external cultural change – inclusion and equity

### **Membership**

- Simplifying formation of new Leagues
- Join at all levels of League

### **Finance**

- PMP structure

### **Data/Technology**

- Information sharing
  - From the grassroots up
  - From LWV down (“best practices”)
  - Among Leagues
- Infrastructure/data system

### **Communications**

- Sharing our impact
- Marketing “Defenders of Democracy”

Noted as absent: Fundraising


## *Appendix B: Assessment Research Methodology*

- External stakeholder interviews were conducted with 20 individuals identified by the national office with a wide variety of perspectives including leaders of well-known national organizations, state activists, academics, and funders.
  - Funders
    - Adam Ambrogi – Program Director, Elections, Democracy Fund
    - Michael Caudell-Feagan – Vice President, Strategy Development and Operations, Pew Charitable Trusts
    - Keesha Gaskins-Nathan – Program Director, Democratic Practice US, Rockefeller Brothers Fund
    - Geri Mannion – Program Director, US Democracy and Special Opportunities Fund, Carnegie Corporation
  - National and State Advocacy Organizations
    - Ellen Buchman – Executive Vice President for Policy, The Leadership Conference on Civil and Human Rights
    - Anita Earls – Executive Director, Southern Coalition for Social Justice
    - Bob Hall – Executive Director, Democracy North Carolina
    - Alissa Haslam – Executive Director, Win/Win Action & Win/Win Network
    - Meredith McGehee – Executive Director, Issue One
    - Brian Miller – Executive Director, Nonprofit VOTE
    - Terry O’Neill – Former President, National Organization for Women (NOW)
  - National Legal Advocacy Organizations
    - Dale Ho – Director, Voting Rights Project, ACLU
    - Deanna Kitamura – Project Director, Voting Rights Project, Asian Americans Advancing Justice Los Angeles
    - Stewart Kwoh – Executive Director, Asian Americans Advancing Justice Los Angeles
    - Trevor Potter – President, Campaign Legal Center
    - Anthony Romero – Executive Director, ACLU
    - Wendy Weiser – Director, Democracy Program, Brennan Center for Justice at NYU School of Law
  - Policy and Research Organizations
    - Kei Kawashima-Ginsberg – Director, CIRCLE, Tufts University
    - Abby Kiesa – Director of Impact, CIRCLE, Tufts University
    - Jennifer Lawless – Director, Women and Politics Institute, American University
- In-depth interviews were conducted with three other national, volunteer-led, federated organizations (Amnesty International USA, Association of Junior Leagues International, and the Sierra Club) to serve as benchmarking reference points. In addition to these interviews, La Piana



referenced research published by the firm about characteristics and inherent challenges facing large, national, federated nonprofits based on case studies with 13 well-known organizations (such as the YMCA, American Hospital Association, March of Dimes, etc.).

- In-depth internal interviews were conducted with seven LWV US board members, seven national staff, one state League staff, and three volunteer leaders during and after the 2017 Council meeting.
  - LWV US Board Members
    - Chris Carson, President
    - Amy Hjerstedt
    - Kim Lauth
    - Karen Nicholson, Vice President
    - Henrietta Saunders, Treasurer
    - Deborah Turner
    - Toni Zimmer, Secretary
  - National Staff
    - Jessica Jones Capparell, Interim Senior Director of Advocacy
    - Sarah Courtney, Senior Director of Communications and Digital Strategy
    - Kate Kennedy, Chief Development Officer
    - Kelly McFarland Stratman, Chief of Staff
    - Jeannette Senecal, Senior Director of Elections
    - Anisa Tootla, Chief Operating Officer
    - Wylecia Wiggs Harris, Chief Executive Officer
  - State League Staff
    - Carrie Davis – Executive Director, LWV of Ohio
  - Volunteer Leaders
    - Sondra Cosgrove – President, LWV of Nevada
    - Susan Prakken-Smith – Nominating Committee, LWV US
    - Robyn Prud'homme Bauer – Co-President, LWV of Arizona
- Surveys were conducted with League leaders from all levels of the organization, with the following response rates. Note the objective was to obtain input from 20 percent of League affiliates at the state and local levels; the outcome far exceeded this objective.
  - National board members: 12
  - State League leaders: 57
  - Local League leaders: 354
- Research on state and local Leagues regarding incorporation and non-profit tax filing status. Information on Leagues in all states and Washington D.C. was gathered and a random sample of



just over ten percent of local Leagues, adjusted to ensure at least one League from each state was included.

- Extensive review of internal documents and data.

## Appendix C: Real-Time Strategic Planning

At La Piana Consulting, we define strategy as:

*A coordinated set of actions designed to create and sustain a competitive advantage in achieving a nonprofit's mission.*

The focus of traditional strategic planning is to produce a formal written document, within a preset time frame, that presents very specific goals and will endure for a predetermined length of time. This approach is just not compatible, however, with the needs of nonprofit organizations functioning in the real, rapid-response world of today.

To address this problem, La Piana Consulting has developed the **Real-Time Strategic Planning** methodology, which will provide you with:

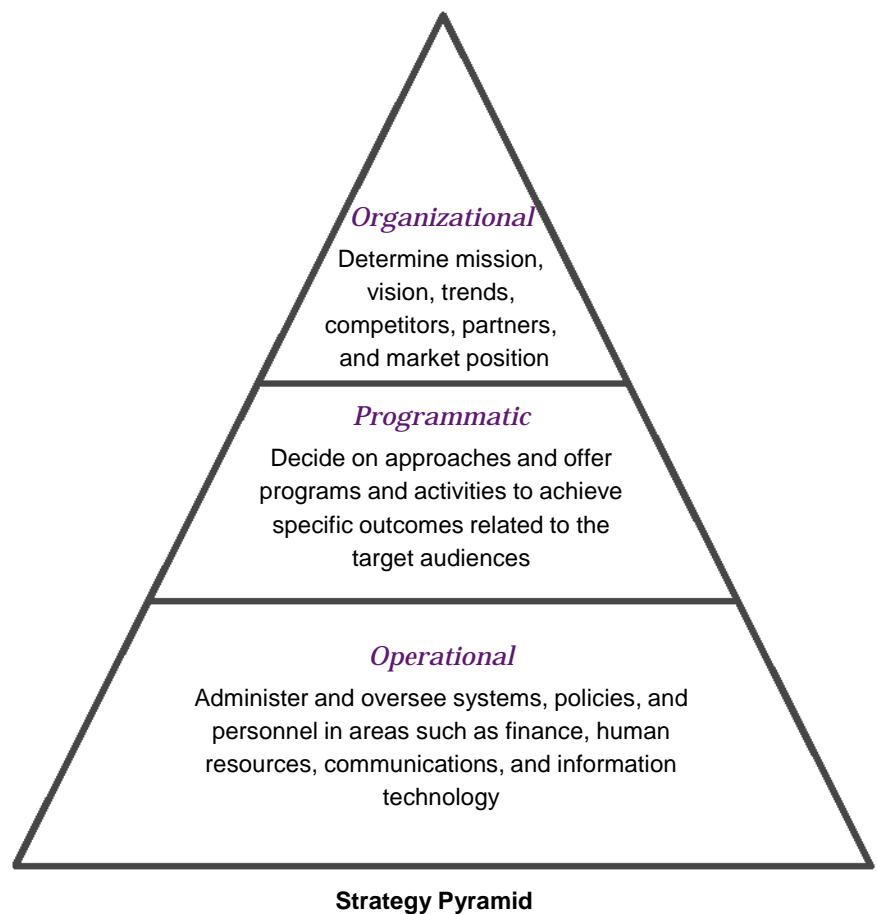
- clarity about your organization's long-term direction; and
- new tools to guide your day-by-day response to new information, and to respond in a way that keeps your organization aligned towards your organizational strategy.

### Types of Strategy

There are three levels of organizational functioning, each of which requires a different type of strategy: organizational, programmatic, and operational. The Strategy Pyramid displays these levels.

We focus first on the top level of your organization's functioning: organizational strategy. Strategies at the other levels must align with the organizational strategy. At this top level, strategies are formed in response to trends or opportunities that may impact your ability to advance your mission, whether positively or negatively.

Organizational strategy can be long-lasting, but it needs to change when it is no longer the best way to advance your mission. You must constantly monitor your environment and your strategy's effectiveness.



# Appendix D: Change Vision for 2016-2020 Strategic Plan

