

Replication Guide for Proyecto PLAN: Poder Latino Action Network



REPLICATION GUIDE FOR PROYECTO PLAN: PODER LATINO ACTION NETWORK

**A Project of the Hispanic office of Planning
and Evaluation, Inc.
Boston, Massachusetts**

Written by:
Emily Gantz McKay
President

MOSAICA
The Center for Nonprofit Development and Pluralism

Develop for:

Hispanic Leadership Development Support Initiative
National Council of La Raza

NCLR
1111 19th Street, N.W. Suite 1000
Washington, D.C. 20036
Telephone (202) 785-1670
Fax (202) 785-0851

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Summary

This replication guide documents Proyecto PLAN (PODER Latino Action Network), the leadership development program of HOPE, the Hispanic Office of Planning and Evaluation, Inc., of Boston. It is one of a planned series of replication guides and materials being developed as part of the National Council of La Raza (NCLR) Hispanic Leadership Development Support Initiative, funded by the W.K. Kellogg Foundation and designed to develop leadership within the Hispanic community by helping Hispanic organizations establish, maintain, and strengthen community-oriented, Hispanic-focused leadership development programs.

This guide attempts to provide an in-depth understanding of Proyecto PLAN, for use by individuals and organizations committed to developing and implementing similar Hispanic-focused leadership development efforts. It should be useful to readers, whether their intent is to refine and replicate PLAN as their leadership program model or simply to learn from its experience and perhaps borrow certain components or approaches.

PLAN was established because Latinos in Massachusetts need "clout." PLAN was developed over a period of several years to address the minimal Hispanic representation in elected and appointed positions of authority and responsibility throughout the state. HOPE, established in 1971, exists to improve the quality of life, to increase the range of life opportunities for Massachusetts Latinos and Latinas, and to address governmental responsiveness to the Latino community in Massachusetts. It provides a statewide view of the physical, social, economic, and political status of the Latino community. Concerned over the lack of a strong Latino voice in spite of a rapidly growing community with many strengths and resources, HOPE developed PLAN to increase Latino participation and influence in all aspects of Massachusetts life. PLAN was developed to meet many needs: to prepare Latinos for leadership roles in community-based organizations, government, and the private sector; to increase the number of Hispanic elected and appointed officials; to increase involvement in Latino and mainstream advocacy organizations; to develop a strong sense of community accountability among activists; to develop the human capital of Latinos whose first language is Spanish; and to bring together Latinos from varied nationalities and backgrounds to work as a cohesive force for community change.

PLAN focuses on involving and supporting Spanish-speaking community residents so that they can become a positive force for community development for Latinos and the broader society. Over time, it hopes to create changes in individuals, community-based organizations, and the broader public, private, and voluntary sectors. While PLAN has been implemented first in Boston, it is designed to become a statewide program, with programs in various communities.

Proyecto PLAN is a promising grassroots leadership development model; it completed its first "cycle" in mid-1995 and was scheduled to complete its second in mid-1996, soon after this guide was completed. The program requires a one-year commitment from its participants, called "associates," and selection criteria require that they enter the program with evidence of community involvement and commitment. The design, as modified after the first cycle, provides opportunities for both formal learning and skill development and informal but structured discussion around issues of broad interest to the Latino community. Core components include monthly skills-building seminars; monthly meetings of all associates, and community projects carried out through issue-focused committees addressing topics of special interest to the associates — in the second cycle, health, education, and politics. The committees enable the associates to become knowledgeable and involved in a program or policy issue, and provide the focus for community involvement. PLAN involves the associates in at least one major

community project during the year; the chosen event during the second cycle is a community associates conference. PLAN also arranges access to additional training and community events for PLAN associates.

Training occurs monthly on a Saturday because of the associates' work schedules; committees meet two or three times a month, usually on weekends. During PLAN's first cycle, associates received small stipends for participation, but these have been discontinued because some associates considered it inappropriate to receive payment for community involvement; the project continues to provide child care during seminars. PLAN is seeking ways to strengthen community linkages; field placements are a goal, but do not currently seem feasible, given the associates' work schedules. Once funding becomes available, HOPE expects to add complementary activities such as a newsletter and a group of public policy interns whose work would support and inform the associates, especially the issue-focused committees and task forces related to them. Following the graduation of the first cycle of associates, some were invited to participate in the program for a second year. Five of them are serving as mentors for the new group and enhancing their own leadership skills. They initially co-chaired the issue committees, a responsibility later taken over by members of the new group of associates. Planned but not yet implemented is a follow-up network to encourage all graduates to continue their relationship with HOPE and involvement in the Latino community.

Available information indicates that PLAN is making a difference. The most evident results are changes in PLAN associates, who show increased self-confidence and self-esteem, report progress in their careers and new plans for additional education. Associates have become more and more effectively involved in the community, and in many cases now plan careers as public officials or community-based organization leaders. Several associates have become visible leaders in the community, establishing new organizations, energizing communities about key issues, and receiving public recognition. The associates are increasing Latino visibility in several mainstream and multi-ethnic organizations and coalitions. Many of the associates report developing a greater personal appreciation of diversity, and improved skills in working with Latinos and others from diverse backgrounds.

PLAN's model appears appropriate for use in many different kinds of communities. It appears most suited to a city which has a fairly well developed nonprofit sector and a variety of advocacy groups, but well established Latino community-based organizations are not a requirement — one of the project's long-term results should be to help in the development and strengthening of such organizations. PLAN is particularly effective in helping to develop unity within a diverse group of associates of varied nationalities. The project was designed to empower "natural leaders" who are already involved in the community but do not hold positions of influence, may be recent arrivals to the U.S., may or may not have had the benefit of access to higher education, and are bilingual or Spanish-dominant. The purpose of the project is broad, and focus can be placed on a particular aspect of society, such as electoral politics or the nonprofit sector, or on particular issue areas, such as education or AIDS. PLAN has identified a number of "critical success factors" which should be carefully considered by any entity interested in replicating or borrowing from the PLAN model, which provides a practical and flexible framework for leadership development, and a foundation for building community support for ongoing community involvement and advocacy.

Foreward

This replication guide was prepared for the National Council of La Raza (NCLR) Hispanic Leadership Development Support Initiative by Emily Gantz McKay, President of Mosaica: The Center for Nonprofit Development and Pluralism. While a staff member of NCLR, Ms. McKay designed and was the original Project Director of the Initiative, which is funded through a four-year grant from the W.K. Kellogg Foundation.

Assisting with collection of information for the replication guide were Mauricio Vivero and Claudia Demegret, past staff of the Initiative, as well as Alvin Cruz and Marco Davis, current staff of the Initiative. Mosaica staff member Diane Cabrales provided quality control for the guide; NCLR's Rosemary Aguilar Francis desktopped it.

Staff of HOPE provided extensive assistance and support to the replication effort. Special thanks go to HOPE Executive Director José Durán, first PLAN Project Coordinator Enrique Ball, and current Project Coordinator Alba Lucía Collado, a graduate of PLAN.

This replication guide — like the NCLR Hispanic Leadership Development Support Initiative, including the subgrants to HOPE for Proyecto PLAN — was made possible by a grant from the W.K. Kellogg Foundation. The information in this guide represents the viewpoints of HOPE and the National Council of La Raza, and does not necessarily reflect the opinions of the Foundation.

The W.K. Kellogg Foundation was established in 1930 to “help people help themselves.” As a private grantmaking foundation, it provides seed money to organizations and institutions that have identified problems and have designed constructive action programs aimed at solutions. A majority of the Foundation's grantmaking is focused on the areas of youth; leadership; philanthropy and volunteerism; community-based, problem-focused health services; higher education; food systems; rural development; groundwater resources (in the Great Lakes area); and economic development (in Michigan). Programming priorities concentrate grants in the United States, Latin America and the Caribbean, and Southern Africa.

I. Introduction

A. Guide Purpose and Background

This replication guide documents Proyecto PLAN (PODER Latino Action Network), the leadership development program of HOPE, the Hispanic Office of Planning and Evaluation, Inc., of Boston. The guide is one of a planned series of replication guides and materials being developed as part of the National Council of La Raza (NCLR) Hispanic Leadership Development Support Initiative, funded by the W.K. Kellogg Foundation.

The NCLR Leadership Initiative was designed to develop leadership within the Hispanic* community by helping Hispanic organizations establish, maintain, and strengthen Hispanic-focused leadership development programs. Over time, NCLR believes that such programs will help to increase significantly Hispanic participation in voluntary and public sector policy-making bodies, and increase the pool of advocates, volunteers, and staff for Hispanic community-based organizations.

The NCLR Leadership Initiative encourages innovative approaches to leadership, focusing on leadership models which, not only increase individual skills and involvement, but also have strong community linkages and emphasize community benefits and community empowerment. NCLR provides subgrants, technical assistance, and other assistance to help design, strengthen, and document a wide range of leadership efforts working with varied populations — youth, women, multi-cultural groups, community activists, parents, elderly, professionals, etc. — in diverse locations. PLAN is one of the Leadership Initiative's first group of grantees.

This guide is based on documentation of Proyecto PLAN's first full leadership cycle and the first half of the second cycle. It covers project activities through 1995 and assesses PLAN's immediate results and impact. PLAN was carefully planned over several years, and NCLR believes that it represents an extremely promising grassroots Latino leadership development model. This replication guide was prepared so that other organizations, now in the process of developing leadership development programs for similar populations, can have the benefit of PLAN's experience. NCLR will also prepare replication guides for several other leadership models and a companion self-help guide providing specific steps in the design, implementation, and management of Hispanic-focused leadership programs.

The replication guide was prepared based on continuing monitoring of the project and two site visits to PLAN during 1994 and 1995, during which representatives of NCLR's Leadership Initiative and subcontractor Mosaica interviewed PLAN and other HOPE staff, PLAN participants, advisory group members, and community activists; held two series of focus groups with program participants; and observed project activities. Supplementing the site visits were additional discussions with key project and HOPE personnel, and written project documentation, including the proposal, quarterly, first cycle final, and other program reports; internal assessments of project activities; participant evaluations of the program; follow-up reports from the first cycle of associates; and copies of training packages and other project materials.

* Throughout this guide, the Hispanic and Latino/Latina are used interchangeably to refer to persons in the United States who are of Puerto Rican, Dominican, Mexican, Central or South American, Spanish or other Hispanic descent.

B. Using the Guide

This guide attempts to provide an in-depth understanding of Proyecto PLAN, for use by individuals and organizations committed to developing and implementing similar Hispanic-focused leadership development efforts. The guide is organized into the following chapters, and provides information and insights on the following aspects of PLAN,

❖ **Chapter II provides project background, including:**

- ◆ The organization that developed and runs Proyecto PLAN;
- ◆ The community in which Proyecto PLAN operates; and
- ◆ Why this model was developed — the needs identified and the reasons for design of a project with the specific purposes, target population, components, structure, and relationships which characterize PLAN.

❖ **Chapter III covers project design and implementation, including:**

- ◆ PLAN's purposes and long-term goals;
- ◆ The leadership group targeted by PLAN — grassroots Latino activists from diverse backgrounds and countries who are Spanish-speaking or Spanish-dominant and are committed to community involvement — including the desired and actual characteristics of PLAN's participants and how the project recruited and selected them;
- ◆ Project components, including original plans and the changes made based on practical experience; the guide describes the purposes, structure, scheduling, content, and approaches used for each component;
- ◆ Program management and staffing, including internal support and linkages;
- ◆ The program's community linkages and external relationships, and how they are developing over time;
- ◆ PLAN's monitoring and evaluation system, which was developed by NCLR's Leadership Initiative (the system is briefly described here, and additional information is available from NCLR); and
- ◆ Resource requirements, in terms of staffing, project, and operating expenses.

❖ **Chapter IV describes program quality and initial impact, including**

- ◆ Strengths;
- ◆ Weaknesses and challenges; and
- ◆ Results and potential impact.

❖ **Chapter V identifies and describes critical success factors, which those involved with PLAN believe must be in place in order to ensure the success of the program; included are:**

- ◆ External factors, related to the community in which the program will be implemented and the organization which will implement it; and
- ◆ Internal factors which should be a part of the leadership program itself.
- ❖ **Chapter VI, a brief conclusion; and**
- ❖ **Chapter VII, provides sample materials** which may be useful in developing a leadership program using the PLAN model.

Throughout the guide, information in boxes summarizes major points and also provides examples and quotations from PLAN associates and from community members who have assisted or observed the program.

The guide should be useful to almost any organization interested in developing a community-oriented, Hispanic-focused leadership development program. The guide should be useful to a wide range of readers, whether their intent is to refine and replicate PLAN as their leadership program model or simply to learn from its experience and perhaps borrow certain components or approaches.

II. Background

A. Organization

The Hispanic Office of Planning and Evaluation (HOPE) exists to improve the quality of life and to increase the range of life opportunities for the Latino community in Massachusetts. A nonprofit, tax-exempt community planning, advocacy, and multi-service organization located in the Jamaica Plain community of Boston, HOPE was incorporated in Massachusetts in 1971 and was celebrating its Silver Anniversary in 1996. HOPE serves as the only capacity-building resource center with both a local community focus and a statewide view of the physical, social, economic, and political status of Latinos and Latinas.

HOPE focuses on five priority areas: education and employment; health education and promotion; community and organizational leadership education; community planning, evaluation, and advocacy; and community economic and social development. The organization works cooperatively with community-based and grassroots organizations, other nonprofit groups, public agencies, individuals, and employers. Through these efforts, HOPE seeks to create, expand, and improve policies, practices, and partnerships, so that they equitably and effectively address Latino communities' needs and acknowledge their assets. HOPE seeks to create opportunities and address problems through six complementary practices, all of which are based on a commitment to building community leadership:

- ❖ **Community and organizational leadership education and development**, to organize, train, and support Latino individuals, groups, and organizations, to identify and develop individual and organizational resources for local capacity-building, economic self-help, and empowerment within the state's Latino communities;
- ❖ **Community service learning**, involving prevention interventions pioneered by HOPE which apply community service-learning theories and popular education approaches to grassroots leadership development;
- ❖ **Capacity-building assistance and support** to create the conditions and provide the technical and support resources that enable and strengthen individuals, grassroots groups, and community-based organizations to effectively engage in community self-help efforts;
- ❖ **Program development, demonstration, evaluation, and replication** involving innovative programs and services for low-income youth, adults, and families which address critical community needs including special catalytic efforts, which use the HOPE structure, resources, and credibility to create other entities or projects important to the Latino community;
- ❖ **Community-based participatory action research**, with the results used to influence public policies and programs so that they equitably and effectively address Latino community needs; and

"Over the years, HOPE has learned how to deliver capacity-building services to Latino community-based organizations and groups, carry out effective Latino-oriented policy analysis and advocacy, educate mainstream groups about Latinos, run effective conferences, and carry out other critical tasks."

— HOPE Capability Statement, 1994

- ❖ **Community-derived problem solving, planning, and action**, mobilized through leadership development and based on accountability to the community.

Structurally, HOPE is organized into four program “resource support centers,” including the Support Centers for Educational and Employability Development Resources, Prevention and Health Promotion Resources, Community/Organizational Leadership Resources, and Community Planning and Development Resources. They are administered and overseen by the HOPE Center for General Administration and Program Support.

Headquartered in the Jamaica Plain neighborhood of Boston with a field office in the city of Lawrence, HOPE has an annual budget of about \$1.5 million and a staff of 26. About 150 active volunteers, most of them graduates of HOPE programs, assist the organization. Nearly three-fourths of HOPE’s funding comes from the public sector and one-fourth from the private sector, including corporations, foundations, and individuals. Foundation and United Way funding have increased over the years. HOPE is governed by a 21-member Board of Directors that reflects the diverse Latino nationality groups residing in Massachusetts. José Durán, M.C.P., HOPE’s Executive Director, has provided staff leadership since 1989. The organization is one of a few well-established and stable Hispanic organizations in Massachusetts. The organization and many of its programs have received statewide and national awards and recognition.

Commitment to community empowerment and leadership development permeates HOPE’s work. HOPE serves a statewide constituency of individuals, community groups, and organizations — including their volunteer boards. In its youth-focused programs from Talent Search and Youth Peer Mentoring to HIV/AIDS prevention and environmental action projects HOPE prepares Latino teenagers to serve as peer educators and community leaders. HOPE provides training and technical assistance to strengthen community-based organizations and to empower individuals within them. A participant in coalitions throughout the state, HOPE provides a Latino perspective to mainstream groups and advocates for resources and services tailored to suit the needs and assets of the Hispanic community. HOPE serves as the fiscal agent for multi-ethnic groups including the Youth Mobilization Project, the Jamaica Plain Healthy Boston Coalition, the Media Education Project, the Parents Institute for Quality Urban Education, and the Child Care Alliance. Since its inception, HOPE has been a catalyst for community planning and action, serving as a “think tank” for planning innovative approaches to community problem solving and as an incubator for identifying, training, developing, and involving emerging community leaders. Many of Massachusetts’ most respected Latino leaders gained skills and experience as part of HOPE’s programs and its broad community network.

HOPE as a lead agency is really committed and passionate about community empowerment and leadership development. You can count on HOPE and its staff for follow-through.

— Latina community leader

B. Why the Model was Developed: Community Characteristics and Needs

HOPE's leadership program was established because **Latinos in Massachusetts need "clout."** The program is called PLAN — the PODER Latino Action Network. PODER is both a Spanish noun meaning power and a verb meaning can or to be able. The brainchild of former Massachusetts State Legislator Nelson Merced, PLAN was developed over a period of several years to address the minimal Hispanic representation in elected and appointed positions of authority and responsibility throughout the state.

Latinos in Massachusetts lack influence or power commensurate with their numbers. The Hispanic population of Massachusetts tripled in size between 1970 and 1990, to about 288,000, with Massachusetts becoming the tenth largest state in Hispanic population. Today, Hispanics represent the largest minority group in Massachusetts, and about 10% of Boston's population are Latino. Community assets and strengths include youth (the median age for Latinos in Massachusetts is about 21), bilingual capability, cultural identity and pride, a tradition of hard work, family values, and a strong sense of community identity. Yet, Latino individuals, families, and communities continue to face major barriers to full participation in the state's educational, economic, health, and political systems. In 1989, Latinos were the poorest group in Boston, with a poverty rate of 46%, with three out of four Latino children under the age of six living in poverty — more than twice the rate for African American children and four times the rate for White children. With a state poverty rate of 47%, Massachusetts Latinos are more likely to be poor than Latinos in the rest of the top ten states in Hispanic populations. In Boston and throughout the state, Hispanics are heavily overrepresented among the working poor, high school dropouts, and persons with AIDS.

By almost any measure, Hispanics in Massachusetts are severely underrepresented in positions of influence and authority. Four years ago, when the idea for PLAN originated, the state had only three Hispanic elected officials; as of early 1996 there are six, all at the local level. The majority — up to three-fourths — of Massachusetts Latinos are citizens, but it is estimated that only a minority of adult Latinos are registered to vote. Few Latinos are active in electoral politics, and the community lacks an advocacy infrastructure. While about 15 Latino organizations in the Boston area provide human services, most are not actively involved in advocacy, and few Latinos are visible in mainstream coalitions. Few mechanisms exist for developing grassroots activists into community leaders.

I have seen estimates that there are as many as 90,000 eligible, unregistered Hispanic voters in Massachusetts.

— Member of the PLAN
Advisory Committee

The diversity of the Latino community in Massachusetts contributes to this lack of visibility and influence. The community is extremely diverse, including very large Puerto Rican and Dominican populations, as well as people from almost every Spanish-speaking country in this hemisphere as well as Brazilians who consider themselves Latino. The state has more than 80,000 foreign-born Latinos from the Dominican Republic, Cuba, South and Central America — some of them naturalized citizens — and a large Puerto Rican population, citizens by birth but often born on the Island. The political histories and structures of their places of origin vary greatly, as does their experience with community involvement and advocacy. Most share a common language; according to 1990 Census figures, more

than 79% of Massachusetts Latinos over the age of five speak Spanish at home. Boston provides limited opportunities for the different groups to work together on issues of common concern. Moreover, grassroots Latinos, particularly immigrants and people who have recently come from the Island and people who are Spanish-dominant, have few opportunities for leadership development. If the Latino community is to participate fully in all aspects of life within Massachusetts, residents from the various nationality groups must come together, learn how the political and economic system works, and be able to speak with a single voice on issues of common concern.

PLAN was developed to address these needs -- to prepare Latinos for leadership roles in community-based organizations, government, and the private sector; to increase the number of Hispanic elected and appointed officials; to increase involvement in Latino and mainstream advocacy organizations; to develop a strong sense of community accountability among activists; to develop the human capital of Latinos whose first language is Spanish; and to bring together Latinos from varied nationalities and backgrounds to work as a cohesive force for community change.

According to advisory group members, the lack of Latino political participation in Massachusetts is partly cultural. Latinos who grew up in other countries may have a lack of history of mobilizing and demanding things for the community. PLAN has to break this mindset, showing that the U.S. works differently and how they can participate. PLAN addresses that cultural issue — most other leadership programs do not.

III. Program Description

A. Program Purposes and Goals

PLAN exists to increase public participation by Massachusetts Latinos. It seeks to increase the number — and support the effectiveness — of emerging advocates, activists, and leaders from Massachusetts' Latino communities as a means of working towards full Latino participation in the political, economic, and community life of Massachusetts. PLAN seeks to empower the Latino community so that its "clout" is commensurate with its size. The program focuses particularly on involving and supporting Spanish-speaking community activists so that they can become a positive force for community development for Latinos and the broader society. Over time, it hopes to create changes in individuals, community-based organizations, and the broader public, private, and voluntary sectors. While PLAN has been implemented first in Boston, it is designed to become a statewide program, with programs in various communities.

Among PLAN's long-term goals are the following:

- ❖ A strong and continuously growing network of Latino leaders who play a key role in policy making throughout the state;
- ❖ Increased Latino voter registration and voting rates;
- ❖ Increased Latino involvement in electoral politics, and equitable representation among elected and appointed officials at both local and state levels;
- ❖ Equitable Latino representation on mainstream nonprofit boards and staffs;
- ❖ An organized Latino community demonstrating unity in its diversity, participating fully and actively in advocacy and public policy efforts throughout the state; and
- ❖ Stronger, better-funded Latino community-based organizations with a strong sense of community accountability.

HOPE believes that PLAN can contribute to all these goals through leadership development which is closely tied to the community and integrated with HOPE's and the community's program and advocacy activities. PLAN received funding from the National Council of La Raza's Hispanic Leadership Development Support Initiative because of its joint focus on the individual and the community, and its emphasis on community accountability.

B. The Leadership Group

1. Target Population

PLAN targets Latino and Latina adults of all ages who demonstrate community involvement and commitment; participants are called "associates." Preference is given to individuals involved in neighborhood or grassroots initiatives, and to parents. Anyone not already associated with a community-based organization or activity is required to develop such an affiliation upon entering the program.

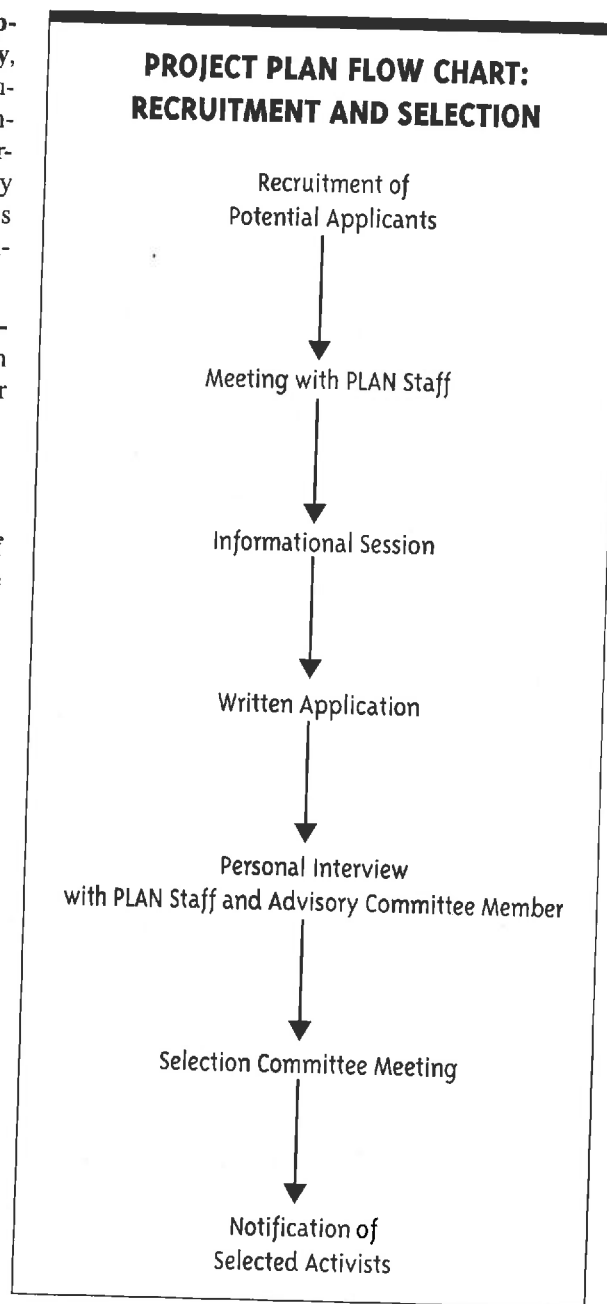
PLAN targets a varied group of participants, representing the diversity of the local Latino community, which has very large Puerto Rican and Dominican populations and also includes people from nearly every Spanish-speaking country. Currently based in Boston, it targets residents of various neighborhoods within or very near Boston; future cycles are expected to target Latinos in other cities within Massachusetts. The program is committed to including equal numbers of men and women.

PLAN has no educational requirements except basic literacy in Spanish or English. Because a decision was made to conduct the program in Spanish at least for the first two cycles, participants must speak Spanish.

2. Recruitment and Selection

HOPE views the recruitment and selection of PLAN associates as an activity deserving extensive attention and care. The outreach and selection effort is both thorough and time-consuming, involving a multi-stage process. The first step involves identifying individuals who might be interested in applying. Staff are assisted by a Selection Committee of HOPE Board members and PLAN graduates, which also serves as the project advisory committee. Outreach includes the following types of efforts:

- ◆ **Newspapers:** Advertisements are run in two Spanish-language newspapers (*El Mundo and La Semana*) and one bilingual newspaper (*J.P. Gazette*). Media stories have also helped to publicize the program; for example, the Boston Globe has run an editorial, and the program has received feature coverage in both English- and Spanish-language papers. PLAN staff estimate that the newspapers generated eight applications during the first cycle; ongoing media coverage has helped to make the program well-known in the community.
- ◆ **Brochure and Flyers:** A brochure and flyers are distributed from HOPE and other community groups over a one-month period during the recruitment period. This process generated two applications for the first cycle.



- ◆ **Word-of-Mouth:** Most important in recruitment is the outreach done by the PLAN staff and associates, HOPE Executive Director, project advisory committee members, and HOPE Board members, who talk about the program in a wide range of community forums. Staff have identified respected community leaders, individuals whose informal approval is important to the project, and met with them individually. They also systematically identify individuals within the community who might either be interested in participating or be able to identify possible participants, and contact them for referrals. Staff estimate that 29 applications resulted from this process during the first cycle. Now that the project has completed one cycle, graduates serve as a major source of applications for new associates; they were the most important source of applicants for the second cycle.

Potential applicants identified through these approaches go through the following steps:

- ❖ **Each potential applicant meets with a PLAN staff member**, who describes the program and gauges the individual's level of interest.
- ❖ **Applicants are asked to attend an informational session, at which they learn more about the program from PLAN staff and advisory committee members and receive application forms.** Those who are unable to attend are met with individually so that staff can go over the application forms and explain the program.
- ❖ **Each applicant completes a written application form in English or Spanish.**
- ❖ **Each applicant is interviewed by at least one Selection Committee member and a PLAN staff member;** the interview process includes a set of questions based on the selection criteria. Evaluation forms are used by Selection Committee members and staff to summarize their reactions to the applicant.
- ❖ **Members of the Selection Committee meet with staff to review applications and evaluation forms, and select participants.**

In addition to determining whether applicants fit the target population description, the selection process uses the following criteria:

- ❖ **Community involvement** at the grassroots level;
- ❖ **Commitment to participating** in a year-long program which demands a considerable time commitment;
- ❖ **Enthusiasm** for the project;
- ❖ **Willingness to share** their skills with and train others;
- ❖ **The quality of community projects** proposed by the applicants, in terms of probable benefit to the community;
- ❖ **Age 19 or older;** and
- ❖ **Diversity** in terms of race, sex, national ancestry, and neighborhood representation.

The chart on the next page shows the characteristics of the first two leadership groups. The second cycle includes five returning associates from the first cycle, and excludes associates who left the program before spring 1996. As the chart indicates, the majority of associates have attended college, and many have bachelor's or advanced degrees. Often, these degrees were earned outside the continental United States. Because many are recent immigrants or grew up in Puerto Rico, they may have high levels of education but limited English fluency. Occupations at program entry vary; some work for community-based organizations, and a number hold service jobs.

C. Components

PLAN had completed one full cycle — running from June 1994 through May 1995 — when this guide was first drafted; it was updated during the second cycle. HOPE made some significant changes in approach based on the experience of the first cycle. This section describes the operational components and the plans for additional activities.

PLAN associates are expected to devote one Saturday a month to training, and to participate in three or four additional activities each month. The major project components are listed in the box and shown in the flow chart which follows. The primary components have been fully implemented, although several supplemental components were not yet operational. Core components include organized skill-building seminars, committees and task forces, other structured activities, one major community project, regular associate meetings, supplemental activities arranged by PLAN staff to offer further opportunities for learning and community involvement, support services to reduce barriers to PLAN participation, and planned complementary and follow-up activities which have not been implemented. The following sections describe the purposes, methods, and experiences of these components.

PLAN conducts all its sessions largely or entirely in Spanish. Materials are provided in both English and Spanish, and staff send them out ahead of the sessions so PLAN associates can review them. Sessions and most group meetings are held in the HOPE offices.

1. Skills-Building Seminars

At the heart of PLAN are skills-building seminars designed to provide basic information and skill development in topic areas of broad use to individuals active in the community. Some focus on critical skills for associates such as organizing and negotiation skills, some provide important information such as steps in the legislative process, and still others provide practical skills such as how to run ef-

Skills-Building

- ❖ Seminar Topics, First Cycle
- ❖ Community Organizing - Introduction and Basic Principles
- ❖ Community Organizing - Campaign Development
- ❖ Role of the Media in Grassroots Organizing
- ❖ Negotiation Skills
- ❖ The Legislative Process
- ❖ Influencing Public Policy
- ❖ Voting/Voter Education and Registration
- ❖ Fundraising
- ❖ Advocacy Skills
- ❖ Running Effective Meetings

| Characteristics of the PLAN Leadership Groups | | | |
|---|--------------------------------------|---------------|---------------|
| Characteristic | Description | 1994-95 Group | 1995-96 Group |
| Number | | 25 | 22 |
| Sex | Women | 13 | 15 |
| | Men | 12 | 7 |
| Nationality | Puerto Rico | 8 | 4 |
| | Dominican Republic | 8 | 6 |
| | Chile | 2 | 0 |
| | Brazil | 1 | 0 |
| | Colombia | 1 | 5 |
| | Cuba | 1 | 1 |
| | Ecuador | 0 | 1 |
| | El Salvador | 1 | 0 |
| | Guatemala | 1 | 0 |
| | Honduras | 0 | 1 |
| | Mexico | 0 | 1 |
| | Panama | 1 | 0 |
| | Peru | 1 | 0 |
| | Venezuela | 0 | 1 |
| Citizenship | U.S. citizens: Native-born | 7 | 4 |
| | Naturalized | 7 | 7 |
| | U.S. residents for " 5 years | 2 | 7 |
| | Immigrants in U.S. " 5 years | 9 | 4 |
| Community Involvement | 6 hours or more per month | 20 | 11 |
| Education (Highest Level Completed) | Less than high school | 1 | 0 |
| | High school or GED | 5 | 5 |
| | Some college | 7 | 4 |
| | Associate degree | 2 | 2 |
| | Bachelor's degree | 10 | 6 |
| | Graduate degree | 0 | 5 |
| Family Status | Married | 12 | 12 |
| | Single | 11 | 5 |
| | Separated or divorced | 2 | 5 |
| | Have children | 16 | 13 |
| Age | <30 | 5 | 13 |
| | 30-39 | 12 | 7 |
| | 40+ | 8 | 2 |
| Income | Low income (" \$14,350) | 3 | 8 |
| | Limited income (\$14,350 - \$21,524) | 5 | 4 |
| | Middle income (\$21,525 - \$50,000) | 17 | 8 |
| | Higher income (above \$50,000) | 0 | 1 |
| Preferred Language Use | Either English or Spanish | 14 | 10 |
| | Spanish | 9 | 11 |
| | English | 1 | 1 |
| | Portuguese | 1 | 0 |

PLAN Components

- ❖ Skills-Building Seminars (Seminarios) - sessions provided one Saturday per month, to present and develop skills related to community involvement
- ❖ Committees and Task Forces - structures used for community involvement; groups formed to reflect interests of associates, who learn about and advocate in relation to a specific program area; groups meet two or three times a month throughout the year and engage in a variety of community activities, as a group or in smaller task forces
- ❖ Other Structured Activities - community forums and study circles used to address policy issues in an organized way; forums involve hearing multiple perspectives on an issue such as whether members of the school committee (the equivalent of a school board) should be appointed or elected; study circles provide facilitated discussions of issues by the PLAN associates
- ❖ Community Project - one major group project during the year, designed to practice skills and benefit the community; for 1996, a community leadership conference at the Massachusetts State House, with workshops and plenary sessions
- ❖ Associate Meetings - one meeting monthly of all associates, to report on group activities, share other information, and plan joint events
- ❖ Supplemental Activities - access to conferences, training, involvement in advocacy coalitions, arranged by PLAN staff
- ❖ Support Services - child care during sessions, breakfast and lunch during all-day sessions
- ❖ Complementary Activities - newsletter, public policy interns to support the work of the PLAN associates (planned but not implemented)
- ❖ Follow-Up Network - method for maintaining links among PLAN associates and encouraging their continued community involvement following graduation from the program (planned but not fully implemented; five graduates participating in the second cycle)

fective meetings (See the boxes for lists of the seminar topics from both cycles). Training is held one Saturday each month, with each session typically including two half-day seminars. Seminars are interactive, typically including a combination of expert presentations of principles and examples, and hands-on skill-building exercises using case studies, problem-solving tasks, role plays, or other active learning techniques. Usually, a seminar includes one or more outside facilitators expert in the topic area. PLAN or other HOPE staff sometimes serve as facilitators.

During the first cycle, required skill-building seminars were held every other month, and other seminars were optional, but this has been changed. Only about half the associates participated in the optional seminars. The current Project Coordinator believes that a high level of program participation is essential to create commitment and effective involvement, and that associates need the opportunity to develop a wide range of skills to support their community involvement. As a result, associates are now required to participate in one full day of training every month; very few absences are permitted, and these are usually "made up" through participation in some special activity.

PLAN is committed to providing training and background materials for each seminar, both for immediate use and for later reference.

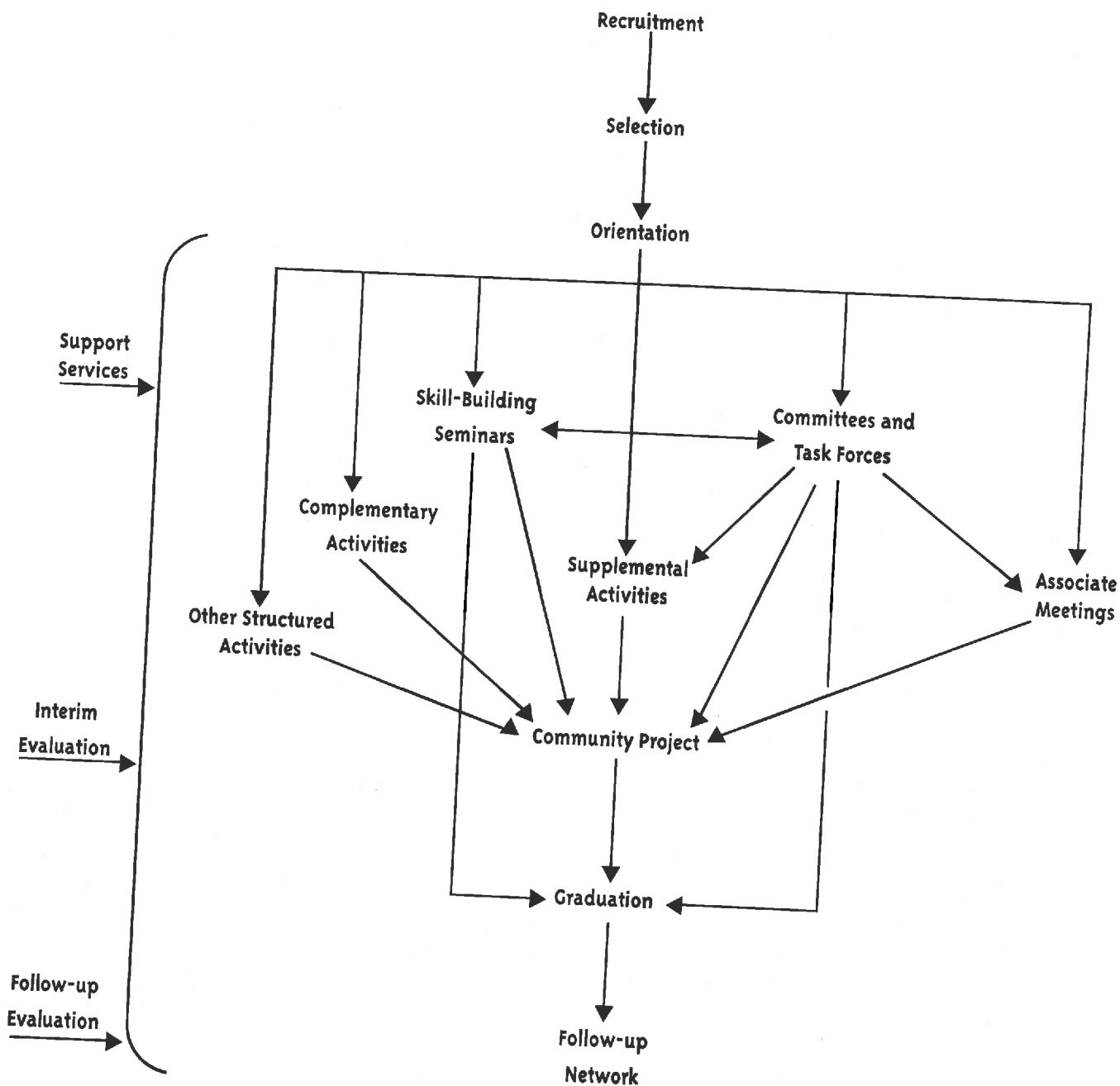
Associates have emphasized in their evaluations the importance of having reference materials in Spanish as well as English. Providing materials can be a significant challenge. Sometimes the facilitator brings materials; sometimes PLAN staff must obtain or develop them. Training and reference materials come from many sources, including training institutes and advocacy groups in Massachusetts and elsewhere. Materials obtained from other sources, especially exercises, usually must be modified to provide a Latino and a Boston focus, and most must be translated into Spanish. Sometimes, materials are technically sound but were designed for use with groups that were largely non-minority and higher income, and require considerable refinement. Developing, modifying, and translating materials has been a major task for PLAN staff, but the project now has a set of tested training materials, most available in both Spanish and English.

Outside facilitators not only bring substantive skills to the seminars, but also serve as role models for the PLAN associates. For example, at the session on Electoral Politics during the first

Skills-Building

- ❖ Seminar Topics, Second Cycle
- ❖ Two half-day sessions were provided each day, usually on related topics:
- ❖ The Electoral Process;
- ❖ City Council and Electoral Campaigns
- ❖ Community Organizing;
- ❖ The Role of Women in Community Organizing
- ❖ Program Planing and Implementation;
- ❖ Proposal Writing: "The Basics"
- ❖ What Constitutes a Leader;
- ❖ Negotiation Skills
- ❖ The Media (Latino);
- ❖ The Media (USA)
- ❖ Charter Schools and the Latino Community;
- ❖ Should School Committee Members be Appointed or Elected?
- ❖ Latinos in Government;
- ❖ The Legislative Process
- ❖ How to Run Effective Meetings;
- ❖ Negotiation Skills II

PROJECT PLAN FLOWCHART OF PROGRAM PARTICIPATION



cycle, a female elected official came with her husband and discussed the importance of her family's support for her work; several PLAN associates reported that she made a lasting impression on them. Some of the facilitators are well-known activists who not only know their topic, but are enthusiastic about PLAN and provide personal encouragement to the associates.

Finding trainers and facilitators who are both, topic experts and fluent in Spanish has proven to be a challenge. Some topic experts, Latino as well as non-Latino, are not comfortable in Spanish. Finding facilitators in the immediate area can be difficult; HOPE has budgeted funds to pay facilitators, which has been very helpful. Having a facilitator who speaks limited Spanish can have a serious negative impact on the session. However, because most associates are bilingual, they can sometimes help with the translation. Part of the Media seminar was conducted by an Anglo woman who spoke Spanish but sometimes needed help in finding the right word; the group supplied the missing terms. Because the facilitator was expert in her field and had a very engaging and interactive training style, and she used several very appropriate small-group exercises, the group responded well in spite of the language problems.

2. Committees

One of the most important goals of PLAN is to create long-term community involvement by ensuring that every PLAN participant is actively involved in helping the community as an integral part of the leadership development experience. While many leadership development models focus primarily on individual skill development, PLAN considers community service and advocacy equally important.

The original PLAN design called for associates to gain practical experience and serve the community through a field placement or community project. This proved very difficult for several reasons, both practical and financial:

- ❖ A limited number of Latino organizations are available to provide field placements and supervision; those which do exist may be unable to provide appropriate supervision for an intern, particularly since PLAN does not have funds to provide an honorarium to the field site;
- ❖ While some associates might be placed in non-Hispanic organizations, this is very intimidating for limited-English-proficient associates;
- ❖ Many PLAN associates work irregular or evening schedules or hold more than one job. Unless PLAN can provide an internship stipend which makes up for lost work time, many associates cannot afford to spend a scheduled period in a community placement.

For such reasons, PLAN has experimented with two alternative approaches to ensure that PLAN associates become involved in the community and practice the skills they are learning in the training sessions: issue forums and committees. Issue forums were used during the first cycles; committees and task forces are being used in the second cycle and will probably be continued in future leadership cycles.

During the first cycle, each PLAN associate was expected to participate in an issue subcommittee focusing on a topic s/he found interesting and important. (The 1994-95 issue subcommittees are

listed in the box; they were selected by HOPE to reflect current policy and advocacy issues.) These topic-focused groups learned about and advocated in relation to a specific program area. They met at least once a month, usually in the evening, shared responsibilities for obtaining information and expertise about a topic, and participated individually and as a group in a wide variety of community activities related to their topic area. They could work with established entities or create their own and recruit other community members to participate. Members of the group became extremely knowledgeable about their issue, as was evident from reports each group made to the full group of associates prior to skills-building seminars. For example:

Issue Subcommittees, First Cycle

- ❖ Welfare Reform
- ❖ AIDS
- ❖ Bilingual Education
- ❖ Housing
- ❖ Public Health

- ❖ The **Welfare Reform** subcommittee educated itself about the various welfare reform proposals being considered by the State Legislature and how they compare to national proposals. Ongoing contact with the Coalition for Basic Human Needs helped it obtain information about proposals involving time limits, work requirements, cuts in benefits, and other restrictions. The subcommittee then organized a Latino Community Forum on Welfare Reform which was held at HOPE as an expanded study circle, to educate the community about the welfare reform legislation being debated in the Massachusetts Legislature. Seventy people from the community attended the half-day forum.
- ❖ The **AIDS** subcommittee helped generate letters in support of AIDS treatment provided by the Ryan White CARE Act, and participated in an HIV/AIDS coalition which otherwise would have little or no Latino participation. Five subcommittee members took part in an AIDS Conference where they learned about the legislative process, participated in community organizing and advocacy workshops, and met activists and public officials concerned with this issue. Members worked with the Massachusetts AIDS Action Committee to organize an event at the State House to educate legislators about the need to strengthen ex-

A Subcommittee Activity

Working in collaboration with the Massachusetts English Plus Coalition, PLAN associates from the Education subcommittee convened a meeting with a member of the commission on bilingual education appointed by Governor Weld. At the meeting, PLAN associates received an overview of the commission's findings and preliminary recommendations. The associates raised concerns about the lack of parent and community resident participation in the commission and in the development of the report. Associates offered several recommendations, three of which were later incorporated into the report:

- ❖ Collecting ongoing data to evaluate the progress of the reforms called for in the report;
- ❖ Auditing school districts to determine to what extent funds earmarked for bilingual education are actually spent for this purpose; and
- ❖ Reconvening the commission in two years and seeking community input at that time.

isting AIDS programs. The subcommittee promoted the event in the Latino community, recruited potential participants, and sought Latino speakers.

- ❖ The **Bilingual Education** subcommittee monitored the work of the Governor's advisory commission on bilingual education. Subcommittee members met with a representative of that state commission, and worked with other bilingual education advocates to help ensure that the state commission recommendations were implemented. They worked with the Coalition for Bilingual Education to organize an event at the Massachusetts State House, to educate newly-elected legislators on the need to increase resources for bilingual education, and to mobilize Latino parents and others to become involved in the legislative process.
- ❖ The **Housing** subcommittee became involved with the anti-rent control question on the ballot in Massachusetts, educating community members about the issue. After the election, in which the anti-rent control question was passed, some subcommittee members participated in events at the State House to educate legislators on ways to provide some protection to the elderly, disabled, and low-income tenants, so that they do not become homeless.
- ❖ The **Public Health** subcommittee was active in the Boston Health Care for All Coalition, and studied various health care reform proposals at the national level as well as changes occurring at the state level. It worked in partnership with the coalition to pressure hospitals to stop cutting services for the poor and underinsured. As a part of a citywide "Health Care Access Project", which sought to promote dialogue with hospitals regarding their community responsibilities, the group organized a community meeting in the Jamaica Plains neighborhood.

The issue subcommittees were integrated into the overall PLAN process. Subcommittees reported back to the full group, educating each other about issue areas, and they often formed the small groups during skills-building seminars. For example, during the Media training, one exercise involved defining a media message and target; the subcommittees each did the exercise in relation to their issue area. The Project Coordinator kept subcommittee members informed about meetings, conferences, training opportunities, and other events related to their subcommittees, which enabled them to gain additional skills in areas of particular interest to them.

The issue subcommittees were found to be useful, but slightly too narrow in scope. They provided a successful means of ensuring community involvement, enabling associates to apply what they were learning in skills-building sessions. The subcommittees contributed to PLAN's goal of increasing Hispanic participation and visibility in the policy arena, and had positive community results. However, when a particular situation ended — such as the passage of the anti-rent control ballot issue — there was little further work for the subcommittee. PLAN therefore used subcommittee experience as the foundation for a refined committee structure, used successfully in the second PLAN cycle.

The PLAN committees now being used are broad-based groups which set goals and a work plan and then become deeply involved in advocacy related to their priority areas. During the second cycle, associates themselves identified three broad program areas of special interest, and committees were established to address each of them. Committee members may work together as a full group or form smaller task forces to carry out specific activities. In addition, one representative of each group serves on a Media and Organizing Committee. When any of the committees requires media assistance, it calls upon the Media and Organizing Committee for assistance.

The PLAN committees meet often and are heavily involved in community advocacy. They generally meet two or three times a month, most often on Sundays; during major campaigns, they may meet several times a week. During the first half of the cycle, a returning associate coordinated each of the committees; that responsibility has now been taken over by the second-cycle associates. The major focus and activities of the committees as of March 1996 were as follows:

- ❖ The **Health Committee** was working with three other agencies to increase hospital services to the community. Because nonprofit hospitals are now being asked to demonstrate community benefits, a Boston advocacy effort led by Boston CARES was negotiating for specific projects benefiting low-income communities. PLAN's Health Committee was working on both short-term and long-term projects. It was presenting proposals with budgets to the local hospitals to meet short-term goals including more interpreters in Spanish and other languages, TV sets in waiting areas to show health education videos, community health advocacy workers, and transportation in cold weather — including use of the existing shuttle to pick up patients as well as workers at regular stops. Long-term goals were being developed by the committee. In addition to this hospital-focused advocacy, the committee was coordinating a community health fair to provide health screening, and recruiting doctors, nurses, and psychologists to participate. A Health Day was being planned for May, to provide information to the community.

PLAN Committees, Second Cycle

- ❖ Health
- ❖ Education
- ❖ Politics
- ❖ Media and Organizing (includes representatives of the other three committees)

- ❖ The **Education Committee** was focusing its efforts on ensuring that bilingual education became an important part of the agenda of the new Superintendent of Schools in Boston. The committee met with the new Superintendent, in coalition with other agencies, to communicate the importance of bilingual education and advocate for more bilingual education and more bilingual teachers. It was also demanding community meetings, and planning for an open meeting at HOPE. The Committee arranged a speak-out with the Superintendent; more than 200 Latino parents participated in Spanish, with English interpretation provided.
- ❖ The **Politics Committee** was involved in several nonpartisan efforts to encourage citizens to become involved in the political process. Members were providing ambulatory voter registration; each had a package to use in schools, universities, service agencies, and other locations. Committee members were copying each registration form in preparation for contacting newly-registered voters in a nonpartisan get-out-the-vote campaign. The goal was to have each PLAN associate register at least 20 people and mobilize them to vote on election day. The committee was also working in coalition with other agencies on an AIDS lobby day at the state legislature, and a Forum on Voting and Citizenship to encourage political involvement.

The committees offer valuable opportunities for community involvement and leadership development:

- ❖ The committees enable PLAN associates to become knowledgeable about issues of real importance and to apply this knowledge in the community, at the same time benefiting the community and honing their own skills;
- ❖ Committees provide different types of action alternatives within a broad issue area, demonstrating the range of community activities available to residents and the need for varied skills and interests;
- ❖ Committees can work in several different configurations. They can set up task forces to plan and implement specific tasks such as a community survey, use issue forums to inform or mobilize the community, take individual responsibility for particular tasks, and work as a full committee on major activities. Committees can also assign responsibilities to individuals, which enables them to become involved in activities of special interest to them;
- ❖ Timing is flexible, so participation can be arranged to fit associates' work schedules and other responsibilities;
- ❖ Associates are becoming involved in mainstream organizations and coalitions, thus providing a badly-needed Latino perspective. In addition, associates are gaining valuable contacts for future community activities; and
- ❖ Community activities reinforce information and skills presented during the skills-building seminars, and enable associates to test these skills in the community while still being able to obtain additional training and support from PLAN.

Perhaps the greatest challenge related to the committees is the staff time required. While field placements would be largely the responsibility of the field site, committees need to be at least partially staffed by PLAN. If the associates meet at HOPE offices on a Sunday, someone must be there to open the door. It is still important for staff to tell associates about opportunities for involvement and advocacy, help them make contacts with appropriate coalitions and agencies, and help to schedule meetings held at HOPE. This is difficult with a very small project staff. However, compared to issue subcommittees, staff spend less time supporting the work of the current committees, partly because the second-year associates take partial responsibility for them.

3. Community Project

PLAN plans one major individual or group project involving all PLAN associates at some point during the year, so they can practice skills and do work to benefit the community, while at the same time providing positive visibility for PLAN, HOPE, and the Latino community. During the first cycle, a community leadership conference was held; a much larger conference was planned for the second cycle. The 1996 conference was to be held at the Massachusetts State House, with a wide range of participants, including public officials, human service organization representatives, small business people, public agency personnel, and volunteers from a variety of backgrounds.

For future cycles, PLAN expects to develop other group projects in which all the associates will participate. Rather than having each associate individually assigned to a field placement, PLAN might

carry out a special project in which all the associates would play a role. One possible project would be to monitor the proposed state budget, following the entire budget process from the time the budget is proposed by the Governor until a budget is approved by the State Legislature. The group would follow hearings, committee mark-up, the floor debate, passage in each house, the work of the conference committee, and final passage of a budget.

Individual community projects might also be carried out. PLAN had felt that some associates might want to become involved in electoral campaigns of their choice to learn firsthand about the political process, but found limited interest during the first cycle, perhaps because no Latinos were running for office in Boston. Some associates did join the Latino Political Task Force and worked on a plan to have a gubernatorial debate focusing on Latino issues. The debate did not occur, but several associates gained valuable experience in community accountability efforts related to the political process.

In future years, PLAN would like to consider implementing individual field placements for the associates, if funds can be obtained to provide both internship stipends to the associates (who might need to take some time off work) and some funding for the host agencies.

4. Other Structured Activities

PLAN periodically uses other techniques to help associates gain information, understanding, and skills related to specific topics. Two approaches in use by PLAN include forums and study circles.

Forums are organized discussions of policy issues at which experts with differing opinions present their perspectives, and are questioned by the PLAN associates. PLAN uses forums to enable the associates to hear and challenge varying views about policy issues, such as whether school committees, the Massachusetts equivalent of school boards, should be elected or appointed.

Study circles (círculos de estudio) are facilitated discussions designed to enable participants to exchange views and discuss a variety of issues related to the Latino community's political development. Study circles were a core component of PLAN during its first cycle; they were used much less frequently in the second cycle, but are expected to be included in future cycles.

During the first cycle, PLAN scheduled a half-day study circle every other month, paired with an optional skills-building seminar, usually on a related topic. The study circle was held in the morning and the training in the afternoon. The study circle lasted about three hours, with the facilitator responsible for helping to provide structure and focus to the discussion. Discussion group topics were determined in part by the interests and concerns of PLAN associates, and in part by political and social developments in the Latino community. (The study circle topics covered by PLAN in 1994-95 are shown in the box.)

Study Circle Topics, First Cycle

- ❖ Voting
- ❖ The Challenge of Latino Political Unity
- ❖ Racism and Race Relations
- ❖ Welfare Reform (Community Forum)
- ❖ The Anti-Immigrant Movement
- ❖ Affirmative Action

Study circles offer many potential benefits:

- ❖ They provide for discussion in a comfortable yet challenging environment;
- ❖ The process fosters consideration of diverse points of view;
- ❖ The discussions inspire direct involvement in the democratic process;
- ❖ Discussing issues important to the community encourages associates to become more thoughtful and more active; and
- ❖ The process educates and empowers participants.

The PLAN study groups use a combination of small group and full group settings so that all associates can participate fully. Based on experience, study groups allocate some time at the end for summing up and identifying common concerns. The associates reported that the discussions have been extremely lively and sometimes heated, and it is sometimes hard to bring closure to the process. Using facilitators not only helps with the process but also enables the associates to become acquainted with community leaders who then become part of their networks. Advisory group members who have served as facilitators reported very positive experiences, and associates said that they felt comfortable calling these individuals for information or help in their community activities. By modeling effective facilitation, the study circles also help prepare PLAN associates for playing similar roles as part of their own community involvement.

PLAN associates reported that the study circles have other positive results. A group of associates stressed that they have gained increased respect for each other's perspectives and come to understand that they can work together towards common goals even though they may disagree on many issues. They felt that the discussions have been extremely helpful in making them appreciate the diversity of their community and understand different perspectives based on different personal backgrounds; for example, they recognized how early experiences affect their views about authority, political systems, and other community issues.

5. Associate Meetings

Once a month on a Monday evening, all PLAN associates and staff meet to share information, plan, and assess their activities. This session provides an opportunity for the various committees to share information about what they are doing, and for the group to plan joint activities such as the associates conference. The meetings also serve to strengthen the sense of teamwork among all PLAN associates, enable staff to provide information about training opportunities and community events, and provide opportunities for discussion of policy and program issues.

6. Supplemental Activities

PLAN makes a number of supplemental activities available to its associates. The PLAN staff is always on the lookout for opportunities for the associates to learn and participate in community organizing and advocacy efforts. To encourage associates to continue their schooling, HOPE has arranged for them to receive tuition waivers at the College of Public and Community Service at the

University of Massachusetts, Boston. Opportunities are provided related to specific PLAN committees; members of committees are informed about conferences focusing on their issue area, and conference registration costs are paid for them. In addition, PLAN looks for training opportunities in topics of interest to the group; for example, associates have participated in workshops on the legislative process and health care. In 1996, six female PLAN associates attended the Latino Women's Conference at the University of Connecticut.

When an associate has to miss a PLAN skills-building seminar, staff tries to arrange for training in the same topic through another source. Staff also informs associates about community events and projects, from voter registration to advocacy campaigns.

An important role of PLAN staff is to maintain broad Latino and mainstream community contacts in order to identify activities of possible interest to particular associates, inform them about these activities based on their schedules and interests, pay registration or other costs, and arrange for their participation.

PLAN holds graduation ceremonies each year. The 1996 graduation was to occur as part of the second Latino community leaders conference, held at the State House.

7. Support Services

PLAN offers a support service which it considers important to the success of the program: child care for associates' children. In addition, on days with all-day seminars, PLAN provides both breakfast and lunch for both the associates and for their children. During the first cycle, PLAN paid small stipends to associates, but these have been discontinued.

PLAN offers child care during the formal sessions. Associates may bring their children with them to HOPE, where they are cared for in the office by trained personnel. Parents are nearby if needed, and the service eliminates the need for Saturday child care by other family members or a paid baby sitter. Since the majority of participants are likely to have children, this service is seen as very important. It not only assures that children are safe and well cared for, but also helps prevent spouses or other family members from opposing PLAN participation during the weekend.

During the first year, PLAN associates received small stipends so that costs related to involvement in formal sessions would not become a serious obstacle to participation. Attendance at PLAN seminars, study circles, optional training, and other activities meant that some associates lost work time and wages, and incurred some expenses. The most obvious direct costs were for transportation; many associates came from a considerable distance to HOPE's offices. Sometimes family arrangements were complicated because the associate was in a session all day Saturday. PLAN was concerned that these costs and arrangements might keep the associates, many of whom had limited family incomes, from participating fully in the program. To prevent this, PLAN paid a small stipend of \$25 for each day of participation in formal training or study circles. However, HOPE found that many of the associates, particularly those with a history of community involvement in their countries of origin, thought that receiving financial compensation for participating in a community group seemed inappropriate. As a result, PLAN discontinued the stipends after the first cycle.

8. Planned Complementary Activities

In addition to the components described above, HOPE believes that leadership development can be facilitated by a number of complementary activities. While funds for these activities are not yet available, PLAN hopes to add the following to the project in future years:

- ❖ A PLAN newsletter through which to document the activities of the PLAN associates and inform the community about their work and about issues of concern to Latinos;
- ❖ PLAN public policy internships, through which individuals committed to learning about public policy formation could support the work of the associates by providing an information link between PLAN and the major legislative bodies — City Council and the State Legislature; and
- ❖ A PLAN leadership forum, to arrange conferences, seminars, roundtables, and other events focusing on issues of concern to Latinos; the associates would help plan events related to the issues on which they were working and would participate in the events.

9. Follow-Up Network

PLAN was developed on the assumption that the associates it trains should become a permanent part of its network. HOPE staff consider it essential to develop a mechanism for ongoing involvement of the associates once their year of formal leadership development ends. The associates themselves expressed considerable commitment to the idea of some ongoing group, so they could meet regularly, continue to develop their skills, and perhaps coordinate their community activities.

While five first-year associates have continued to participate in the program for a second year, no specific mechanism has been developed to involve all graduates, primarily because of a lack of staff resources for this task. Several approaches have been suggested by the associates or HOPE staff:

- ❖ The associates could form a 501(c)(4) entity which would advocate on behalf of the Latino community.
- ❖ Graduates of PLAN could form the community organizing arm of HOPE.
- ❖ The PLAN alumni could continue to meet regularly as a group, perhaps once every two months, carrying out joint community projects and serve as a support group for each other.
- ❖ A newsletter could be developed to link the associates from year to year, and give visibility to their work and that of PLAN.

PLAN associates feel it is very important that they continue to meet regularly after graduating from the formal PLAN program:

- ❖ "We should be responsible as alumni to help the program."
- ❖ "It would be a waste of resources if they don't keep us going; they shouldn't let us just go do our own thing."
- ❖ "We can help keep it serving other participants the same way it has served us."

- ❖ Associates from previous years could serve as mentors for the PLAN associates in future years; this is already being done by the five "returning" associates, but could involve all prior-year associates.

"We should start an organization within PLAN that would concentrate on helping people organize themselves."

— PLAN associate

D. Management Support and Internal Linkages

PLAN operates as an integral part of HOPE, with strong staff and board support. Structurally, PLAN is a project of HOPE's Center for Community and Organizational Leadership, which includes HOPE's peer mentoring project for youth, and its organizational leadership and development efforts.

The PLAN Project Coordinator reports to the Center Director, who reports to HOPE's Executive Director. The Center Director serves as both a supervisor and, a "sounding board" for the Project Coordinator. The Coordinator is a member of HOPE's Program Coordinating Council, which includes representatives from each of HOPE's centers, programs, projects, initiatives, and task forces. The Coordinating Council links programs internally to increase and improve collaboration, cooperative activities, concentration of efforts, avoiding duplication of efforts, and strategic planning.

PLAN's Coordinator is the project's only full-time staff member; the Coordinator has part-time secretarial and administrative help and also uses consultants, primarily for skills-building seminars. Providing oversight and support to the project are two different entities:

- ❖ A Staff Steering Committee of HOPE senior staff, who provide review and oversight of project activities, playing a major role in project evaluation.
- ❖ An Advisory Committee of seven members, four of them Board members and three PLAN graduates, who serve as the Selection Committee for PLAN and meet bi-monthly to provide guidance and feedback on all aspects of the project. The Project Coordinator also consults with them individually.

PLAN has strong support from HOPE's Board of Directors, who are extremely committed to grassroots leadership development.

While PLAN has linkages with some other HOPE projects, there is potential for a great deal more internal coordination. During the first cycle, the AIDS issue subcommittee exchanged information with HOPE's HIV/AIDS prevention projects. Cooperation on activities of mutual interest is feasible not only in this program area but also in education, where HOPE has active projects. Staff from other components have assisted with seminars, and may be used more in the future to share their expertise.

Eventually, PLAN may be "spun off" to become an independent organization. Especially if the project becomes statewide, the project and an active association of graduates may be large and strong enough to become independent. This could enhance its advocacy capability, which HOPE feels might eventually be constrained by the fact that HOPE has considerable public funding.

E. Community Links/External Relationships

PLAN has benefited greatly from HOPE's extensive relationships with both the Latino and the broader communities. HOPE has close relationships with the Latino community through the Community Resource Center, which has assisted many Latino community-based organizations and groups, and through its leadership in planning, policy analysis, and advocacy. HOPE also works closely with many mainstream organizations, and HOPE's Executive Director and other senior staff are sometimes the only Hispanics represented on coalitions and interagency organizations. HOPE also serves as the fiscal agent for a number of other entities, many of them multi-ethnic. In addition to staff contacts, HOPE's Board of Directors is multi-ethnic and has broad and varied community contacts. Being a part of HOPE has given PLAN immediate credibility.

The leadership program is constantly developing and strengthening its own external relationships. During the initial outreach and planning effort, many contacts were made with individuals and organizations whose support was considered important to PLAN's success. The Project Coordinator has contacted many coalitions and advocacy groups, particularly those addressing the issue areas covered by the subcommittees, to facilitate associates' involvement with these entities. All three second cycle PLAN committees work in coalition with other organizations, and this has increased the project's visibility not only among Latino organizations but also in the broader community. Other organizations have been contacted both for referrals and about possible community projects or advocacy involvement. In the future, PLAN hopes to establish a Community Support Network of organizations, grassroots groups, and individuals committed to facilitating and supporting community-derived collective action.

The Project Coordinator periodically visits agency directors of non-Hispanic organizations to talk about the project. Some of the associates work for such organizations, and the support of their Executive Directors is important, both to arrange leave time for PLAN activities and to enable PLAN associates to practice their new skills on the job and take on new responsibilities reflecting their training. Without specific outreach from PLAN, these agency directors may consider PLAN a distraction from work or even a potential threat due to the project's emphasis on increasing Latino clout. Once they understand the project and in some cases are asked to become involved in its activities, they usually become supporters.

F. Monitoring and Evaluation System

PLAN's monitoring and evaluation system was developed by the National Council of La Raza, which provided a set of forms and procedures to document all the projects funded as part of its Hispanic Leadership Development Support Initiative. Each project modified the forms as needed. PLAN modified the forms to fit its needs, and also used Spanish versions of the participant forms. PLAN has also been careful to keep copies of all materials used in the project, as part of the documentation process.

The monitoring and evaluation system includes participant- and program-based forms to obtain baseline data, to document and monitor project implementation and quality, to assess participant outcomes at project completion, and to provide follow-up later. Participant Application Forms were completed by all the associates selected and for other applicants, associates have provided written as-

assessments of skills-building seminars, and staff prepared a Participant Recruitment/Selection Report and quarterly progress reports to NCLR. PLAN recently completed follow-up interviews with graduates from the first cycle, but neither it nor NCLR has yet completed a full evaluation process. The information from various reports was used in preparation of this replication guide.

For purposes of the replication, a brief interim assessment of project quality and interim outcomes was developed and used — in English and Spanish — for focus groups of PLAN associates and individual participant interview during the first replication site visit in October 1994. The same questions were used in two additional focus groups held during the second replication site visit in May 1995.

NCLR provided a format for pre- and post-seminar assessments of training, but each project was responsible for developing specific questions related to the content of the training it offered. PLAN found it too time-consuming to develop such pre- and post-seminar assessments, so the project has depended largely on post-seminar assessments of seminar quality and perceived value. PLAN staff also indicated the need for a form and procedure for periodically evaluating progress from a participant perspective during the leadership cycle.

Copies of all the evaluation materials and instructions for their use are available from the NCLR Hispanic Leadership Development Support Initiative.

G. Resource Requirements

Implementation of PLAN without the complementary (but not yet implemented) components requires, at a minimum, the following resources:

- ❖ A full-time Project Coordinator to coordinate recruitment and selection, take primary responsibility for managing the skills-building seminars and study circles, staff the issue subcommittees, maintain external contacts, and document the project;
- ❖ Consultant trainers and facilitators to develop training materials and run seminars;
- ❖ Personnel time to modify existing training materials and translate them into Spanish;
- ❖ Secretarial and administrative support to organize the seminars and other events, assure that food and beverages are arranged, the room is prepared, and other logistical needs are met, and to handle documentation;
- ❖ Personnel to provide child care during seminars and other formal events;
- ❖ Funds to pay for registration and training costs so that associates can participate in conferences and training sessions related to their issue subcommittees and broader interests;
- ❖ Either internal facilities adequate for skills-building seminars or arrangements for space in some other location;
- ❖ Resources to cover recruitment and external relationship costs, such as printing of a brochure and flyers, running advertisements in local newspapers unless this can be arranged *pro bono*, and covering meeting costs for informational sessions, as well as expenses related to open houses, graduation ceremonies, and other events to which community leaders may be invited;

- ❖ Costs of purchasing training materials and technical and background materials related to the skill-building seminars and issue subcommittees; and
- ❖ Operating and support costs for project personnel.

The project is very demanding for a single professional staff member; a second professional staff member or an intern would be extremely useful, and would enable the project to implement supplemental project components such as the newsletter and the network of graduates.

In an established organization like HOPE with training facilities and strong managerial and administrative support, the core project can be operated for about \$70,000 (1996 figures) with one full-time professional, or \$100,000 to \$125,000 with two full-time professionals. The minimum in-kind contribution is about \$12,000 per year in facilities and equipment, plus assistance from other agency staff. Implementing the proposed complementary components would require funds to cover stipends for public policy interns; resources to prepare, print, and disseminate a newsletter; and resources to plan and implement conferences and workshops.

IV. Program Quality and Preliminary Impact

Proyecto PLAN has completed only one full cycle, and cannot yet be fully evaluated. However, a review of its first cycle as implemented, and the refinements made for the second cycle, highlight many project strengths, several weaknesses, and a number of challenges still to be met. In addition, preliminary results and potential areas of impact can be identified. These are summarized below, to help other leadership programs learn from PLAN's experience.

A. Strengths

The project has many strengths. The following were considered especially important by participants, observers, and staff:

- ❖ **Target population:** PLAN effectively reaches and serves leaders who have great potential for helping Latino communities but are largely ignored by most leadership groups — grassroots associates, individuals who in most cases are not employed in professional jobs but are natural leaders, people who may be recent immigrants or recent arrivals from Puerto Rico and therefore have limited English proficiency. They are deeply committed and hardworking, but not "already accomplished."
- PLAN helps to tap "untouched talent in the community — untouched because of a lack of English. We must get them into the mainstream of our community."
— PLAN associate
- ❖ **Staff:** PLAN has capable, committed staff with a grassroots focus and strong community roots. In 1996, the Project Coordinator was herself a PLAN graduate. HOPE's senior staff are widely known and respected in the Latino community as well as the broader community.
 - ❖ **Mix of participants:** PLAN deliberately seeks out, brings together, and unifies a diverse group of associates, varied in nationality, age, educational background, economic status, occupation, gender, and other characteristics, yet enables them to work together.
- "We learn from each other, and gain experiences from other countries. The group is so well balanced, half born here, half born elsewhere. It's eye-opening."
— PLAN associate
- ❖ **Network:** PLAN is developing a diverse network of grassroots leaders who should be able to work together in the long term to help the community.
 - ❖ **Community ties:** PLAN emphasizes community involvement and accountability, rather than focusing primarily on developing individual skills. Committees, as used in the second cycle, are expected to carry out a variety of community-based activities, usually in coalition with other organizations.
- "Five years into the future we will have this common experience. I will feel comfortable calling any of the others. The network will continue."
— PLAN associate

- ❖ **Varied opportunities for learning:** PLAN provides a variety of learning experiences for associates, from interactive training to community experience through the issues subcommittees. There is a combination of theory and practice, discussion and action. Associates are encouraged to continue learning outside the program, and given contacts who can help them do so.
- ❖ **Cultural relevance:** PLAN recognizes and addresses cultural issues. The program reflects an understanding of Latino culture, family issues, and challenges. It is not culture-neutral.
- ❖ **Quality of training:** The quality of skills-building seminars and other structured training is high. Evaluations at the end of the first program cycle indicated that nearly two-thirds of PLAN associates rated the training as “very good” and 100% as “good” or better; 100% said the training fully or largely met their expectations.

B. Weaknesses and Challenges

The following are some project weaknesses which still need to be overcome. PLAN is working to address them during this first implementation cycle.

- ❖ **Difficulties in assuring an ongoing community connection involving ties to a specific organization or group.** Because it has not proven feasible to implement field placements, there is a concern that some associates may not establish an ongoing community connection or a sense of community accountability. Because PLAN participants are recruited city-wide, the project cannot emphasize connection with a specific neighborhood. The committees are heavily involved in advocacy, but do not represent an ongoing structure for community involvement.
- ❖ **Need for immediate community involvement.** Because of the need to develop a knowledge and skill base, the project tends to emphasize skills-building seminars during the first three to six months of each cycle and provide the strongest field experience late in the cycle. While committees do begin early in the cycle, at first they focus heavily on planning and learning. Each cycle is responsible for a major community project, but it is usually carried out towards the end of the cycle when skills are well developed. The project would like to initiate a major community project earlier in the cycle, to integrate and field-test skills as soon as possible, and to emphasize the project’s commitment to active community involvement.
- ❖ **Links with HOPE projects:** There is a need to integrate the PLAN committees with related HOPE projects. Some initial contacts have been made. During the second cycle, associates were told about all of HOPE’s programs, and several PLAN associates provided a presentation for HOPE’s youth prevention project on the importance of registering and voting and getting involved in the political process. However, these activities have only “scratched the surface” of potential collaboration which would be mutually beneficial.
- ❖ **Need for community organizing links:** Because HOPE has not been directly involved in community organizing, PLAN is being looked to as the potential community organizing arm of the organization. This may ultimately prove beneficial, but developing that link will take time and effort — and will require engaging PLAN graduates on a continuing basis.

- ❖ **Lack of follow-up network for PLAN graduates:** Since no follow-up network has been established, some PLAN graduates from the first year are no longer formally connected to each other or the project. While many of them report continuing their community activities, some feel they cannot do so on their own. A support structure is needed to overcome this problem and encourage ongoing community activism among all PLAN graduates. A network would also provide a continuing connection with HOPE and with current PLAN associates.
- The project also faces some significant challenges**, some of which relate to the external environment in which it operates and others related to its target population and design.
- ❖ **Limited number of Latino agencies and coalitions:** While there are a number of Latino organizations in the Boston area, only a few are strong and stable. The small number of active Latino coalitions or advocacy organizations makes it hard to find opportunities for community advocacy for those participants who are not fluent in English. Moreover, associates need strong ties with Latino organizations as a base for continued community involvement.
 - ❖ **Language issues:** The decision to conduct sessions in Spanish means that the project can involve limited-English-proficient associates, but it also means that associates who do not speak Spanish cannot be included, and complicates efforts to identify trainers and facilitators. In addition, translation of materials into Spanish involves considerable time and cost. After several cycles, a set of materials available in both languages will have been prepared, and materials will require less staff time.
 - ❖ **Curriculum.** While a growing body of materials have been obtained, modified, developed, and translated, staff still sees a need for a more formal curriculum. The project has changed its components, including the skills-building seminars, based on experience. There is not yet a fully developed curriculum to guide the entire leadership development cycle. Other demands on staff time make development of such a curriculum difficult.
 - ❖ **Enhanced training for second-year associates.** In the second year, PLAN has benefited greatly from the continued involvement of five first-year associates. They have helped to coordinate the PLAN committees, served a mentoring role, and contributed to the entire leadership development process. To maintain their involvement, these associates need opportunities for more advanced training and for challenging assignments. How to provide a second-year program to ensure ongoing growth for these returning associates represents a challenge for the project.
 - ❖ **Associate volunteer time:** PLAN associates often hold jobs which do not offer release time for community activities, many PLAN associates hold more than one job or are working and going to school, and participants often have significant family responsibilities. PLAN associates may have limited additional time for volunteering. This has prevented PLAN from implementing field placements. It has kept some interested individuals from participating in the program, and has contributed to several associates leaving the program before completion. However, the experience of the second cycle — when greater time demands have been placed upon associates but the great majority of activities have been scheduled for weekends — suggests that PLAN can find associates willing to make the required time commitment. Providing child care and arranging meetings on Sunday have been very important in maintaining high levels of participation — but are very demanding on staff.

- ❖ **Mentoring:** PLAN recognizes the value of mentoring, but has not had the staff time needed to formalize a mentoring program. Graduates from the first cycle who are participating in the second cycle serve an informal mentoring role for some associates, and there is potential for establishing a mentoring program focusing on graduates from prior cycles. Advisory committee members and others are also serving as informal mentors for some of the associates. However, there is a perceived need to expand and formalize a mentoring system.
- ❖ **Involvement of additional agency personnel:** A number of staff of mainstream nonprofit agencies have expressed interest in the program, but there have been limited opportunities to involve them, partly because sessions are done in Spanish, and partly because developing appropriate roles and relationships is a time-intensive effort. PLAN believes it is important to work with and be respected by mainstream organizations — organizations that have membership and involve grassroots people. Ways are needed to make these connections, in spite of limited staff time.

"Lots of organizations know about PLAN. We hope for organizational support for specific projects. We must keep in mind the need for continuing outreach and community support."

— PLAN Advisory Committee member
- ❖ **Involvement of business and academia:** As with agency people, the project has not yet had the time or resources to fully involve business persons or individuals from Boston's higher education community. PLAN needs to find ways to substantively involve such people.
- ❖ **Focus areas:** HOPE believes that one of the most important areas in which Latinos need to become involved is electoral politics. However, only a few associates were interested in electoral work when they entered the program. HOPE believes this is partly because of a lack of democratic traditions in some of the countries where the associates grew up, and the lack of visible Latino candidates and leaders in electoral campaigns. Ways are needed to encourage interest in this aspect of citizenship.
- ❖ **Staff time:** PLAN is currently operating with only one full-time project staff member, and obtaining needed project resources is a continuing challenge. Operating a high quality, comprehensive leadership program requires considerable staff resources. Desirable project enhancements such as establishment of a follow-up network of PLAN graduates and expanding external linkages are not being implemented because the single staff person simply does not have time for them. Logistics and paperwork alone consume a great deal of staff time, and the weekend schedule of seminars and committee meetings means that staff must work most weekends. HOPE would also like to implement several complementary components including a public policy internship program, which require additional time and resources. Another staff person is needed in order to fully meet project needs.
- ❖ **Statewide expansion:** HOPE has always viewed the Boston PLAN as the demonstration phase of a larger, statewide effort. If PLAN is to expand to other cities, a significant amount of new funding must be identified. Some foundation funding has been obtained, and the early success of the project may encourage additional funding for expansion.

C. Results and Preliminary Impact

PLAN is just beginning to obtain documentation of long-term individual results and community impact. Interim information provides many positive indicators, involving both first-year associates (PLAN graduates) and second-year associates.

The great majority of the first cycle of associates — 22 of 25 or 88% — completed the entire one-year program. One left because of work requirements, one because of the long commute required for participation, and only one because the program didn't meet his expectations. Of the 21 first-year associates selected for the second leadership cycle, two (10%) have dropped out. Given the high level of required participation over a one-year period, this represents a very high retention rate.

The associates, advisory committee members, project staff, and community leaders and associates all identified significant changes in the PLAN associates. Among the most frequently reported were the following:

- ❖ Many PLAN associates are now taking leadership roles in community activities. For example:
 - ◆ One PLAN associate initiated a parent group which is organizing other parents around bilingual education. It is teaching parents their rights, Boston public school laws and regulations, and how to participate in the decision-making process to obtain a better education for their children.
 - ◆ Another PLAN associate, who had devoted the past nine years to parenting responsibilities, became involved in community organizing around the issue of poor air quality in her children's school. She has organized parents and met with Boston's Mayor, School Superintendent, and the Chairman of the Health Committee in the state legislature — and obtained a commitment from the Mayor to solve the problem, with parent involvement.
 - ◆ A PLAN graduate is now director of a resource center for immigrant workers. She gained considerable community visibility when she declined an award from the Governor of Massachusetts highlighting the contributions of immigrants to the state, because of the Governor's support for policies which would deny immigrant rights.
 - ◆ A PLAN graduate distinguished herself in work with a community health committee to obtain better health services for community residents, and on the board of a parents' child care organization. She has also spoken about the role of women in community organizing. This PLAN graduate recently received an award from the Philanthropic Initiative as a 1996 Boston Neighborhood Fellow.
 - ◆ A PLAN graduate who is also on the Boston police force has helped develop a Latino police officers group to work with youth and adults in the community; another PLAN associate facilitated the process.
 - ◆ When one of the few Spanish-language radio programs was threatened with cancellation, a PLAN graduate arranged a community initiative that convinced WOMB, the radio station, not to cancel the four-hour weekly show until the group has a chance to develop a proposal to

increase the number of listeners, improve format, and seek funding. HOPE staff worked with PLAN graduates on the proposal, which calls for establishing a Listener Membership and Community Sponsorship Program. HOPE has committed to partial sponsorship of the program, and will provide fundraising assistance.

- ❖ **Many of the associates show increased self-confidence and self-esteem.** They and those who observe them agree that they are “growing” rapidly. Recent immigrants realize that they can apply skills from their home countries, and can play an active role in the community even if they are not yet fluent in English. They report being more assertive in job and family situations as a result of their PLAN training.
- ❖ **Some of the associates report progress on the job, as do some of their employers.** Five first-year associates report promotions, new positions, or greater responsibility. Several individuals working in nonprofit organizations are reportedly taking on more responsible roles. Several associates who were working in jobs unrelated to community service have taken new jobs in community organizations.

A PLAN associate reports that she now has job skills which allow her to do community organizing “and get out from behind the desk. I am more aware of the individual agendas and interests of other people and how that impacts my ability to motivate and organize them.”
- ❖ **Definitions of leadership have changed and become more realistic.** Several indicated that they used to see leaders as the people who were visible at events; now their views are “less romanticized.” They believe that leaders are the people who make sure the important work gets done, develop and empower others, and work for positive community change.
- ❖ **Associates report impact on both themselves and their families.** They share information with family members, involve family members in their community activities, and depend upon family support for their activism. Several associates reported that their children had gotten involved in the community. Program involvement has led to positive changes in family relationships, although the time required places a strain on family time.
- ❖ **Associates have learned about the political, legislative, and electoral process, and are becoming a part of it.** Several emphasized the importance of “learning how the system works.” They report understanding how individuals and organizations can make change, and working to use these skills. One graduate ran for a political party’s precinct committee.

When asked if their definition of leadership had changed because of PLAN participation, associates responded:

 - ❖ “Now I know that a leader is not only the front runner, in the public eye. The leader is the person who is here late at night, planning, so things work.”
 - ❖ “Before, I saw myself leading the way, carrying the baton. Now I know that the key is teaching people to help themselves — learning to pass the baton.”
 - ❖ “Other people make you a leader. You have to know how to depend on other people, and give them responsibilities, not tell them what to do.”

- ❖ **Many of the associates report increased or more effective community involvement.** Several graduates are now serving on the Boards of Directors of community-based organizations, Latino and non-Latino, or have run for election to community offices. They report being more self-motivated and more likely to take leadership roles in their community work, more able to motivate and educate others, and able to better direct their energies. Some associates report that the number of hours they spend on community activities has not increased, but their work is now more focused, more intense, and more effective. One associate called it "active as opposed to reactive." Several associates have become involved in new community activities because of the project, including voter registration and AIDS advocacy. Several are more involved in mainstream groups and coalitions.

"The study circles motivated me and gave me the information which led to my running and getting a position on the School Site Council."

— PLAN associate
- ❖ **The associates have learned how to work with the media, and some have received media coverage for their community work.** In one two-month period, four associates were interviewed on radio or television or quoted in newspaper articles about issues ranging from homelessness to the need to engage Latino youth in the political process. Several associates have made contacts in the media as a result of their community involvement activities with PLAN, and receive media calls for comments when a story breaks in their program area. One emphasized having learned to use the press to express the community's ideas and communicate them to public officials.

At a focus group with first-year PLAN participants, one of the associates described how she had spent several months trying to get the City to do needed repairs and beautification on her block. She could not get her telephone calls returned. Then she was highlighted in an article in the Boston Globe. Soon after, City officials called her — and the community beautification work was done.

The associates saw this experience as a clear demonstration of the importance of media visibility in being seen as a leader and being able to create positive community change.
- ❖ **At least four associates have gone back to school,** three using the tuition waiver at the University of Massachusetts, and several others plan to do so, reportedly as a result of the project. Others plan to seek additional education; one plans to get a Master's in Political Science.
- ❖ **Career goals have become more community-oriented;** several associates say they plan to direct community-based organizations, and others plan to run for elective office.
- ❖ **There is a greater appreciation of diversity** and a growing belief that Latinos from different nationality groups and backgrounds can work together as a unified community. Associates stressed how much they have learned about unity in diversity from interactions within the group.

These interim results indicate that PLAN is not only helping associates develop their personal leadership skills, but also increasing their sense of community accountability and enabling them to begin activities that should lead to positive community change and to increased "clout" for Latinos in many spheres of life.

Community impact cannot yet be fully evaluated, but available information suggests that community benefits are already occurring, primarily increased community self-help efforts involving PLAN associates as local leaders. For example:

- ❖ PLAN associates — both graduates and current PLAN participants — have established new organizations. Associates have organized and spearheaded the development of the following groups:
 - ◆ **Padres Latinos en Acción (PLEA)**, an advocacy coalition of agencies, parents, and associates established to address the need for Latino representation in the public schools and especially in decision- and policy-making regarding bilingual education.
 - ◆ **OLA (Organizadores Latinos en Acción)**, a group that plans educational training sessions, strategies, and networking to increase their own skills and contacts and assist the agencies where they work.
 - ◆ **Boston Latino Peace Officers Association**, which began as a study group for Latino candidates in the police academy and is now becoming an incorporated organization of Latino police candidates and officers.
 - ◆ **Brazilian Immigrants Resource Center**, a community-based center providing information to recent immigrants.
 - ◆ **Fusión Latina Radio Program**, the community-based support network established as part of the campaign to prevent cancellation of the WOMB Spanish-language program.
- ❖ PLAN associates have increased voter registration, increased the number of Latino advocates visible in the community, and encouraged activism through their own activities and their community leadership conferences.
- ❖ They have trained other community members, including family members, and have encouraged their involvement as voters and advocates. Some of the 1996 PLAN associates have established a political committee, and held a training for additional volunteers to do voter registration. Several associates report frequent telephone calls asking for information about voting, the legislative process, school policy making, and other aspects of "how the system works."
- ❖ They have communicated the importance of bilingual education to the new School Superintendent and the Governor, and worked to improve their children's schools.
- ❖ They have arranged a health fair to provide health screening and referrals for treatment to residents who may have limited access to preventive health care.
- ❖ They have provided a Latino voice as part of large-scale advocacy efforts in health care, AIDS, housing, and welfare reform — a voice that was often lacking in mainstream coalitions.

PLAN associates are viewed as a pool of grassroots Latino leaders to be tapped by mainstream organizations. HOPE receives telephone calls from organizations with job openings for bilingual personnel, or the need for Latino volunteers or Board members.

By being visible, active, and well-informed, the PLAN associates are gradually changing community perceptions of Latinos and increasing community awareness of Latino concerns. Over time, a "critical mass" of PLAN associates can help ensure that Latino perspectives on policy issues and Latino community needs are regularly sought by public officials, elected and appointed, at every level of government. They can help assure that the nonprofit sector includes Latinos in governance and management and is responsive to Latino service needs.

The project has also changed HOPE, including the way it is viewed in the Latino community and by mainstream organizations. Long respected as a service provider, HOPE is now known as a source of information about grassroots leadership, and is seen as both sensitive to community needs and integrally involved with the community.

HOPE has made PLAN an integral part of the organization. A PLAN associate now serves on the Board of Directors, and PLAN associates have made presentations to the Board and gone with Board members to visit funders. HOPE's three-year strategic plan for its leadership program includes continuation of Proyecto PLAN plus establishment of YouthPLAN and CommunityPLAN projects:

- ❖ **Proyecto PLAN:** In addition to continuing the one-year current PLAN format, HOPE intends to formalize the PLAN Peer Mentors program, through which program graduates return as peer educators and trainers to assist subsequent PLAN cadres, and establish a PLAN Graduates/Alumni Association, to provide an ongoing link for PLAN graduates with both Proyecto PLAN and HOPE.
- ❖ **CommunityPLAN:** This new entity will provide an advocacy infrastructure operating as an independent membership association and network with support from HOPE and other community organizations. It will be actively supported by PLAN graduates and the graduates of several HOPE youth programs, including YouthPLAN.
- ❖ **YouthPLAN:** The Youth Peer Leadership Action Network will serve as a bridge between youth participation in HOPE youth programs and potential membership in CommunityPLAN.

HOPE is assisting other organizations and communities to develop similar programs. A presentation about the program at the 1995 National Council of La Raza conference in Dallas, Texas, has contributed to requests for information, materials, and assistance from other organizations. Staff were planning a visit to assist an organization in the West to develop a similar program.

V. Critical Success Factors

Certain factors, internal and external, are critical to the success of any leadership program. The major purpose of this replication guide is to provide information to individuals and organizations interested in developing a similar program in their communities, to decide whether the project model is likely to “work” in their community environment, and if so, to be sure that critical components or approaches are made a part of their program. Proyecto PLAN staff, associates, advisors, and friends have identified a number of factors which are likely to determine whether a project like PLAN will be successful in other communities. These “critical success factors” are described below; any organization interested in implementing a similar leadership development program should carefully consider them.

A. External Factors

The following are believed to be critical success factors external to the program — factors related to the community environment in which a leadership program like PLAN is to be implemented and the organization which will administer it.

- 1. Latino population:** PLAN was developed to fit the needs of the Latino population in the Boston area and in Massachusetts. Staff believe that the project would be appropriate in many different kinds of communities. For example, they feel that it is not necessary that Latinos be a relatively small minority; PLAN should be effective in cities where the Latino population is very large. However, the project was specifically designed to work in a community with a diverse Latino population representing many different nationality groups, and a significant number of newcomers — either recent immigrants or people from Puerto Rico who are citizens by birth but may have come recently to the continental U.S. The design is particularly appropriate for individuals who may have received much of their education and perhaps been associates in a different country. They may lack English language skills, but have much transferable experience, although they may not be aware of this when they enter the program. The mix of native-born and non-native-born participants is an important feature of the program, and the study circles are an important means of helping these diverse participants learn to respect and understand each other.
- 2. Urban environment:** PLAN was designed to operate in an urban environment, a place with a large number of nonprofit organizations which are involved in a range of activities, including human services and advocacy. Its use of external trainers and study circle facilitators depends upon a fairly large pool of such individuals. Moreover, while the training occurs only one day a month, the program envisions more frequent meetings of the issue subcommittees and participant involvement in a variety of conferences and meetings. The issue subcommittees are perhaps the component most dependent upon the resources of an urban area.
- 3. Advocacy organizations:** Because PLAN is advocacy- and activist-focused, it depends upon the presence of a variety of organizations, coalitions, and informal groups engaged in advocacy around

External Success Factors

- ❖ Diverse Latino population
- ❖ Urban environment
- ❖ Presence of advocacy organizations
- ❖ Thorough community needs assessment
- ❖ Sponsoring organization credibility and capacity

issues of concern to Latinos and to other low-income and working-class people. The program can operate in a community with a large number of mainstream or multi-ethnic entities or with a large number of Latino advocacy groups. But there must be opportunities for participants to become involved with existing efforts to influence policies and programs important to Latinos. PLAN's issue subcommittees were designed to take advantage of the many area groups studying and taking action on varied program topics such as AIDS and welfare reform.

4. **Community needs assessment:** Proyecto PLAN was designed following a careful and extensive assessment of community needs. Its stated purposes, the target population, the mix of seminars and study circles, the decision to require evidence of community involvement as an entrance criterion, the topics emphasized in the formal sessions, the use of issue subcommittees, the decision to do sessions in Spanish — all these reflect an understanding of the Latino community in the Boston area and its relation to the broader society. HOPE has long been involved in assessing community needs, and uses both formal research and informal consultation to provide a continuing understanding of the community it serves. If the PLAN approach is to be adapted for use in another community, many decisions — such as participant targeting, outreach and selection, and the choice of topics for leadership development sessions — depend on carefully determining the status and needs of the local Latino community.
5. **Organizational credibility and capacity:** HOPE's visibility and credibility in the Latino community and among mainstream organizations and leaders were extremely important in gaining support for PLAN. In spite of considerable formal outreach, most applicants came to PLAN because of personal outreach by HOPE's leadership. The associates were willing to commit themselves to a year of involvement because they believed that HOPE would provide a program deserving that level of commitment. Opportunities for associates to work with multi-ethnic and mainstream coalitions come largely because HOPE is well known and respected within the nonprofit sector in Boston. Several nonprofit employers have provided release time for employees because PLAN is a project of HOPE. An organization which was less well known or less credible might have difficulty in attracting the desired target group and gaining community support and assistance for the project.

"Agency integrity within the community is terribly important. The organization must be credible, since people will not make a commitment to the project unless they can be sure it will not fail."

— Community Leader

B. Internal Factors

Following are critical success factors which should exist within the leadership program. These are in addition to the key leadership development components — particularly the skills-training seminars and issue subcommittees — described earlier.

1. **Planning:** The people involved with developing and implementing Proyecto PLAN and those responsible for its monitoring agree that one of the distinguishing characteristics of PLAN is the time and effort spent in its design and development. The concept for the project was developed

several years before it was initiated; implementation was delayed because expected funding from a major foundation did not materialize. HOPE continued to refine the project design as it sought other funding. The result is that the project was thoroughly developed when it began implementation, which reduced the uncertainty in its first year.

Internal Success Factors

- ❖ Careful planning
- ❖ Thorough, multi-stage selection process
- ❖ Required participant commitment to the project and to community involvement
- ❖ Participant diversity
- ❖ Strong grassroots community focus
- ❖ Staff with strong community links, commitment, and broad skills and experience
- ❖ Teamwork and cooperation within the organization and between the organization and community activists and organizations
- ❖ Flexibility and willingness to change components and approaches

2. Selection process:

PLAN's process for doing outreach and recruitment and its multi-stage selection process receive considerable credit for the project's committed and impressive participant group and high retention rate during the first year. PLAN associates agree that the selection process increased their motivation and commitment to the program. Because they had to participate in an information session, complete a written application, and be interviewed — usually by both staff and Selection Committee members — they took seriously the required one-year commitment, and felt honored when they were selected for the project. Several participants turned down other training and educational opportunities to participate in PLAN. One reported that the experience he gained through the PLAN interview process enabled him to interview successfully for a new job. Staff and Selection Committee members believe the process both enabled them to make good selection decisions and gave credibility and importance to the project.

"The interview was tough. But you appreciate the project because you worked for it. You feel lucky to be a part of it, and you want to follow through."

— PLAN associate

3. **Required participant commitment:** Participants, staff, and advisory group members agree that one of the important factors in PLAN's success has been the level of commitment demanded from and given by the associates. Every applicant was required either to be able to show current community involvement or to agree to develop a community connection upon program entry. Every applicant was required to commit to participation in the program for an entire year. Time commitments were clearly specified, and a schedule given to associates very early in the program. The required commitment contributed to the sense of the program's importance, and both associates and staff have respected this commitment. In fact, staff believes that the increased time commitment required in the second cycle has led to greater associate commitment.

4. **Participant diversity:** While the diversity of PLAN associates represented a challenge to the program, participants and others associated with PLAN now consider it one of the most important factors in the program's success. Among the most important benefits of the program, the associates believe, is that a group of extremely diverse participants have learned to respect each other's differences and work together as a unified group on issues of common concern. PLAN provides many opportunities for associates from diverse backgrounds — in terms of education, nationality, life experience, gender, language preference, socioeconomic status, and other factors — to discuss their differences and reach common ground; the study circles have been particularly important in this regard. Associates stress that they may "usually disagree" substantively with a particular individual but have learned to respect his/her analytic skills. Associates raised in the United States explain how much they have learned from those who grew up in a different country, with a different form of government and different traditions. Because the Latino community is so diverse, associates feel that this aspect of the project has been extremely important in preparing them to work effectively not only with other Latinos but also with the multi-ethnic population of Massachusetts.

"Having a very heterogeneous group is very positive; the Boston Latino community is very diverse. The male/female ratio is also good — it gives weight to both views....We have developed a sense of camaraderie. We have to learn to bring in others, but first we need to be strong within ourselves."

— PLAN associate
5. **Grassroots focus:** PLAN is fundamentally a grassroots leadership project, designed to identify "natural leaders" within the community who are involved in the community but are not yet recognized leaders, often because they are recent immigrants who do not yet know the American "system," limited-English-proficient, and/or not in influential jobs. Everyone associated with the project recognizes that many individuals with such characteristics have great leadership potential. A project like this will "work" only if there is genuine respect for such individuals, and a deep-felt recognition that they are an appropriate target group for an intensive leadership development effort, and that empowering them will benefit the community.
6. **Staffing:** Like most successful projects, PLAN has had very effective staffing in its first two years. Because the leadership initiative has only one full-time staff member, that individual's talents, skills, commitment, and personality are all extremely important to the project. During the first year of implementation, PLAN benefited from having a Project Director with a number of important characteristics: he was from the community and had a strong commitment to grassroots organizing and to community-derived leadership; he had excellent contacts in the Latino community and among advocacy groups in the broader community; he had skills in developing training materials and organizing training, as well as administrative skills; he was fully bilingual; and he communicated commitment, concern, and respect in all his dealings with the associates. During the second year, the project has benefited similarly from having a highly committed and skilled Project Director who is also a PLAN graduate. Personal experience with the project greatly eased the transition and gave important credibility to the changes made in Proyecto PLAN and the increased demands on the associates' time. During both years, the Project Directors' skills were complemented by those

of their supervisors and the Executive Director, who had strong community experience, were expert trainers, and provided a combination of advice, support, and supervision.

7. **Teamwork and cooperation:** PLAN is the product of teamwork and cooperation within and outside the organization. Several people helped to develop the PLAN model prior to its funding, the project has benefited from ongoing advice and support from Board members and other community activists, and many community members helped to identify the individuals who have become PLAN associates. Skills-building seminars, study circles and forums, and the work of the committees all require cooperation and assistance from experts inside and outside PLAN, and advocates inside and outside the Latino community. A leadership development effort like PLAN cannot be run by a single organization; it requires cooperation and support from many individuals and organizations.

"If you want to learn the value of the Latino community, go to PLAN. It will open your eyes. You will see differences and learn to value them."

— PLAN associate

8. **Flexibility:** No matter how well planned a project is, changes in the design are bound to be required as the project is implemented. PLAN was carefully planned, but many changes have been made in the original design in order to overcome obstacles and address participant needs. For example, the originally planned field placements appeared not to be feasible, so the project developed the more flexible issue subcommittees as an alternative, and then created the more broadly focused PLAN committees during the second year. Staff originally planned to run skills-building seminars bilingually, but found it was more practical to do them in Spanish. As problems have arisen, PLAN has addressed them with considerable flexibility, willing to make changes which are likely to improve the project even though this has placed extra demands on staff. PLAN is also flexible in another way; its design allows for emphasis on aspects of society which are of greatest interest to a particular cycle of associates; one year, the project could emphasize electoral politics, another year Latino involvement in the nonprofit sector. Community involvement can focus on different topics, given different public policy issues and associate interests. PLAN provides a framework for empowerment and skills building, but is flexible in its substantive focus.

VI. Conclusion

Proyecto PLAN is an exciting and promising grassroots leadership development model, appropriate for use in many different kinds of communities. It appears most suited to a city which has a fairly well developed nonprofit sector and a variety of advocacy groups, but well established Latino community-based organizations are not a requirement — one of the project's long-term results should be help in the development and strengthening of such organizations. PLAN is particularly effective in helping to develop unity within a diverse group of associates of varied nationalities. The project was designed to empower "natural leaders" who are already involved in the community but do not hold positions of influence, may be recent arrivals to the U.S., may or may not have had the benefit of access to higher education, and are bilingual or Spanish-dominant. The design provides opportunities for both formal learning and skill development and informal but structured discussion around issues of broad interest to the Latino community.

The purpose of the project is broad: to increase Latino "clout" by helping to develop a new cadre of Latino leaders who eventually will increase Latino participation in all aspects of local life — political, economic, and community. Focus can be placed on a particular aspect of society, such as electoral politics or the nonprofit sector, or on particular issue areas, such as education or AIDS. The design provides a practical and flexible framework for leadership development, and a foundation for building community support for a long-term community involvement and advocacy effort.

CONTACTS:

At HOPE:

For information about Proyecto PLAN:
 Mr. Haner Hernandez, Director, Implementation and Operations
 c/o Mauricio Rodriguez, Assistant Director,
 or Ofelia Peña, Administrative Assistant, Implementation and Operations
 Hispanic Office of Planning and Evaluation (HOPE)
 165 Brookside Avenue Extension
 Jamaica Plain/Boston, MA 02130
 Telephone (617) 524-8888
 Fax (617) 524-4939

At NCLR:

Alvin Cruz, Director
 Hispanic Leadership Development Support Network
 National Council of La Raza
 1111 19th Street, N.W., Suite 1000
 Washington, DC 20036
 Telephone (202) 785-1670
 Fax (202) 776-1792

VII. Materials

PLAN is a well-documented project, and skills-building seminar materials and other substantive materials can be obtained from HOPE. Attached are a small number of carefully selected materials that may be of particular use to organizations who wish to implement a similar leadership development effort:

- ❖ Sample flyers: announcements of a PLAN seminar on the Legislative Process (for PLAN associates) and a community forum sponsored by the Health Committee (open to the community), both in English and Spanish; also included is an announcement of a community forum on immigrant rights, in Spanish.
- ❖ Sample training materials: a sample training agenda on the legislative process, a sample exercise on developing a legislative campaign, and a sample handout on developing an organizing campaign.
- ❖ List of training materials: a preliminary list of training materials available from the project, including an indication of the languages in which they are available; additional materials are being developed as the program continues.

*Do you know how a bill and a petition
became a decree law?*

Do you know how to present a petition?

These and other issues will be examined IN SPANISH

PLAN SEMINAR on The Legislative Process

When: Saturday, April 20 Breakfast- 9:00 AM
Seminar - 9:30 AM to 5:30 PM

Where: HOPE 165 Brookside Ave.
Jamaica Plain, MA 02130

Facilitators:

Workshop:

Margarett Blood, Former legislative aid to Rep. Kevin Fitzgerald

Open Discussion With:

Rep. John E. McDonough
Eva Gerena, Actual legislative aid to Rep. McDonough
Giovanna Negretti, actual legislative aid to Sen. Wilkerson

For more information call
Alba L. Collado 617 524-8888

A light breakfast,
lunch and Child
Care will be
provided

Sponsored by PODER LATINO Action Network (PLAN), a project of the
Hispanic Office of Planning and Evaluation (HOPE)

Next training...May 18, 1996

*Sabe Usted Cómo un Proyecto de Ley se
Convierte en Ley?*

*Sabe usted Cómo presentar un Proyecto
de Ley?*

Estas y otras preguntas se examinarán **en español** en un:

Seminario de PLAN sobre: El Proceso Legislativo

Cuando: Sabado, Abril 20 Desayuno: 9:00 a.m.
Seminario: 9:30 a.m. a 5:30 p.m.

Donde: HOPE 165 Brookside Ave.
Jamaica Plain, MA 02130

Facilitadores:

Taller:

Margarett Blood, Ex-Ayudante legislativa del Rep. Kevin Fitzgerald

Discusión Abierta con:

Rep. John E. McDonough

Eva Gerena, Ayudante legislativa del Rep. McDonough

Giovanna Negretti, Ayudante legislativa de la Sen. Wilkerson

Para más información favor
llamar a: Alba L. Collado 617
524-8888

Se proveerá
desayuno ligero,
almuerzo y
cuidado de niños

*Patrocinado Por PODER LATINO Action Network (PLAN), un proyecto
del Hispanic Office of Planning and Evaluation (HOPE)*

Próximo Taller...Mayo 18 de 1996

**VOCES UNIDAS POR LOS
DERECHOS DE LOS INMIGRANTES**

*Conozca las consecuencias de las
nuevas leyes de inmigración en
la Comunidad Latina!*

PANELISTAS:

Jenny López, META
Mario Davila, AFC
Juana Hernández, IWRC
Oscar Chacón, Centro Presente

Día: 15 de mayo de 1996
Hora: 6:00 p.m. a 9:00 p.m.
Lugar: Roxbury Community College
Centro de Estudiantes
1234 Colombus Ave.
(Roxbury Crossing)

Una invitación del Comité de Política de PLAN, un proyecto de HOPE
Auspiciado por el programa CIRCLE de UMASS, Boston

Para más información llamar a Alba L. Collado 524-8888

**PLAN's Health Care Committee
invites you to a FORUM about**

**REFORM IN HEALTH CARE:
ITS IMPACT IN THE LATINO COMMUNITY**

You will learn:

- *The elected official,
wath are they doing with your Health?*
- *How can you benefit from
the new health programs?*
- *Who can hepl you with your
Health Care problem*

PANELISTS:

Hector Morales.

**Mezhu Lui: Community Organizer
(Health Care For All)**

Mario Davila: American Friends Committee

**Rep. John E. McDonough: Chairman,
Committee on Health Care**

**Ms. Mercedes Barnet: Health Care
Commisioner's Assistante for the Minority**

Date: Saturday May 25, 1996

Time: 10:00 a.m.

Were: Roxbury Community College

(take the orange line to Roxbury Crossing station)

For more information and reserve Child Care please call: Alba Lucia Collado @ 524-8888

Sponsoring by PLAN a HOPE's Project

**El Comite de Salud de PLAN invita
a un FORO Sobre:**

**REFORMAS EN EL SISTEMA DE SALUD DE
MASSACHUSETTS: SU IMPACTO EN LA
COMUNIDAD LATINA**

Usted se enterará de:

- *Que estan haciendo los altos funcionarios
Públicos con su salud!*
- *Como usted puede beneficiarse de los nuevos
programas de salud!*
- *Quien puede ayudarle con su problema de
salud?*

PANELISTAS INVITADOS:

Hector Morales.

*Mezhu Lui: Organizadora de Salud para Todos.
(Health Care For All)*

*Mario Davila: Miembro del Comité de Servicio de
Amigos de America.*

*Representante John E. McDonough: Presidente del
Comité de Salud, Casa del Estado*

*Ms. Mercedes Barnet: Asistente del Comisionado de
Salud Representando a las Minorias*

Dia: Sabado 25 de Mayo ,1996

Hora: 10:00 a.m.

Lugar: Roxbury Community College

(Tomando el tren de la linea naranja hasta la estación de Roxbury Crossing.)

Para más información y reserva de cuidado de niños por favor llamar a: Alba Lucia
Collado al 524-8888

Patrocinado por PLAN un Proyecto de HOPE

“A Guide to Effective Meetings” (National Council of La Raza, Washington, D.C.)

Excerpts from Getting to Yes* (Fisher)

“Negociación”*

“Reuniones Efectivas”*

“Toma de Decisiones en Grupo”*

“Asuntos a Considerar en la Evaluación”*

Media

Excerpts from “Media Strategy for Organizers” (Charlotte Ryan, Trainer/Facilitator):

“Unpacking a Frame - Worksheet”

“How to be a Good Source”

“Mainstream Notions of What’s Newsworthy”

“What is a News Story?”

Exercise on Framing an Issue for the Media* (Charlotte Ryan, Trainer/Facilitator)

Exercise on Mapping a Media Strategy* (Charlotte Ryan, Trainer/Facilitator)

PLAN Seminar: The Legislative Process

February 25, 1995

Facilitators: Margaret Blood / David Cortiella

| | |
|---------------------|--|
| 9:30 AM - 9:45 AM | Introductions |
| 9:45 AM - 10:05 AM | The State Government <ul style="list-style-type: none">- Executive Branch (Governor)- The Judicial Branch- The Legislative Branch |
| 10:05 AM - 10:35 | The Legislature - Organizational Structure <ul style="list-style-type: none">- House and Senate Leadership- Committees- Membership |
| 10:35 AM - 11:05 AM | The Legislative Process |
| 11:05 AM - 11:20 AM | BREAK |
| 11:20 AM - 11:50 AM | Exercise |
| 11:50 AM - 12:30 PM | Discussion of Exercise |
| 12:30 PM - 1:30 PM | LUNCH |
| 1:30 PM - 2:00 PM | Legislators and constituents |
| 2:00 PM - 2:15 PM | Lobbying guidelines |
| 2:15 PM - 2:30 PM | BREAK |
| 2:30 PM - 3:15 PM | Exercise and discussion |
| 3:15 PM - 4:00 PM | Governor's budget / Legislation: AIDS, Health Care, Bilingual Education, Housing, Welfare Reform |

PLAN is a project of the Hispanic Office of Planning and Evaluation

PLAN Seminar: The legislative process

Exercise on developing a legislative strategy

You're concerned about hunger among children in Massachusetts. Based on the background information provided by the facilitator, how would you use the legislative process to address this issue? Working in small groups, please answer the following questions:

- ❖ What research and analysis is needed?
- ❖ Who are the key public policy players on this issue? How are they affected?
- ❖ Who will oppose you?
- ❖ What short-term tactics could you use?
- ❖ What long-term tactics could you use?
- ❖ At the conclusion of this campaign, what steps would you take to be in a better position for the next one?

PLAN is a project of the Hispanic Office of Planning and Evaluation

SEMINARIO DE PLAN

PLANIFICACION DE CAMPAÑAS DE ORGANIZACION COMUNAL

Una estrategia de campaña son: 1) una mejoría concreta; 2) el fortalecimiento de la organización; y 3) el desarrollo y la educación de nuestro liderato y membresía.

¿Qué constituye una buena estrategia?

Una buena estrategia debe:

- ❖ Obtener mejorías concretas
- ❖ Darle a la gente un sentido de poder por medio de la organización
- ❖ Comenzar a redistribuir la riqueza y el poder en la sociedad
- ❖ Poderse ganar
- ❖ Unir a nuestros miembros actuales y potenciales, no dividirlos
- ❖ Enseñarle a nuestros miembros cómo funciona realmente el proceso político
- ❖ Envolver activamente a nuestra membresía
- ❖ Ser flexible y tomar en cuenta cosas que pueden o no pasar
- ❖ Tener objetivos a corto, mediano y largo plazo
- ❖ Tener como foco el poder real de nuestra organización - su fuerza numérica

Cómo planear una estrategia

Sabemos cómo debe ser una buena estrategia. Ahora debemos descifrar cómo elaborar una. Los puntos principales que siguen tienen que ser considerados en la planificación de la estrategia de cualquier organización.

1) ¿Cuáles son los objetivos de la estrategia?

- ◆ ¿Logrará mejorías concretas?
- ◆ ¿Puede darle a la gente un sentido de poder por medio de la organización?
- ◆ ¿Comenzará a redistribuir la riqueza y el poder en nuestra comunidad?

2) ¿Qué tipo de investigación y análisis son necesarios?

- ◆ ¿Qué leyes, reglamentos y precedentes existen para desarrollar nuestra posición?
- ◆ ¿Quién es el oficial responsable que tiene el poder para decir que sí a lo que queremos?
(El "BLANCO" de la campaña)

- ◆ ¿Qué “blancos indirectos” podemos alcanzar que pueden influenciar a los blancos principales?
- ◆ ¿Qué pretextos podrían dar los blancos y cómo podemos contestarles?
- 3) ¿Cuáles son las consideraciones organizacionales?
 - ◆ ¿Desarrollará a la organización? (más miembros, liderato, poder, fama)
 - ◆ ¿Tiene la organización suficientes recursos para llevar a cabo la campaña? (tiempo, apoyo numérico, destreza, personal, dinero)
 - ◆ ¿Se puede ganar?
- 4) ¿Quiénes son los grupos interesados y cómo son afectados?
 - ◆ ¿De quién es el problema? ¿Cuán enojados están?
 - ◆ ¿Por qué es un problema?
 - ◆ ¿Pueden los grupos afectados ser organizados?
 - ◆ ¿Cómo envolvermos a mucha gente?
 - ◆ ¿Dividirá la cuestión la gente?
- 5) ¿Quiénes son los blancos?
 - ◆ ¿Quién tiene el poder para resolver el problema?
 - ◆ ¿Cuáles son los blancos intermediarios a los que enfrentarnos para llegar a la oposición principal?
 - ◆ ¿Existen algunos aliados?
- 6) ¿Qué tácticas podemos utilizar?
 - ◆ ¿Reuniones? (grandes, pequeñas, con quién, dónde) ¿Manifestaciones? ¿Negociaciones? (cuándo, dónde) ¿Uso de los medios de comunicación?
 - ◆ ¿Qué tenemos que la oposición/blanco quiere o necesita? (dinero, votos, cooperación, apoyo, trabajo)
 - ◆ ¿Qué cosas mostrarán nuestro poder?
 - ◆ ¿Qué cosas envolverán activamente a nuestra membresía?
 - ◆ ¿Qué educará a nuestros miembros sobre el proceso político?
 - ◆ ¿Qué hará que el blanco reaccione? ¿Qué cosa nos llevará al próximo paso?

