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Giving Voice: Examining the Tactical Repertoires of Nonprofit Advocacy for Disadvantaged Populations

<https://doi.org/10.1515/npf-2023-0054>

Received July 17, 2023; accepted June 24, 2024

Abstract: Representation is an important role of the nonprofit sector as these organizations can give voice to the priorities of their constituents. This is particularly important for disadvantaged communities that may lack access to traditional democratic processes. What advocacy tactics are most utilized by nonprofit organizations serving disadvantaged populations? Given variation in nonprofit advocacy tactics, which tactics are perceived as most effective? To answer these questions, we look to the framework of tactical repertoires from sociological studies of social movements. Analysis of a survey of New England nonprofits ($N = 656$, 55 % response rate) indicates that nonprofits serving disadvantaged populations use similar tactics to organizations advocating for other constituencies but employ them at higher rates. These tactics cluster into three tactical repertoires, each a different combination of advocacy tactics. Perceptions of advocacy effectiveness are associated with the size and nature of tactical repertoires, client participation in advocacy, government funding, and perceptions of the policy environment.

Keywords: tactical repertoires; policy advocacy; advocacy effectiveness

1 Introduction

Nonprofit organizations play an important role in enhancing democracy by both representing and mobilizing their constituents (Almog-Bar and Schmid 2014; Boris, McKeever, and Leydier 2021; LeRoux, Langer, and Plotner 2023). One way that nonprofits fulfill this role is by representing disadvantaged communities in the

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policy process through advocacy, including lobbying (Guo and Musso 2007; Guo and Saxton 2010; MacIndoe 2014; Strolovitch 2006). We are interested in better understanding how nonprofits play a representative role for their constituents. Further, we want to understand advocacy outcomes, a lesser studied area of advocacy research (Ward et al. 2023).

To address these gaps in the literature, this paper draws from two distinct bodies of research, sociological studies of social movements and nonprofit studies of policy advocacy tactics. While the sociological literature offers a framework for understanding advocacy tactics, tactical repertoires (Taylor and VanDyke 2004), the nonprofit literature offers a large body of empirical research about the factors that influence nonprofit involvement in advocacy (Suárez 2020). Together, they can help us better understand how charitable nonprofits engage in formal and informal political processes to give voice to disadvantaged populations. The research questions which drive this inquiry are: What advocacy tactics are most utilized by nonprofit organizations serving disadvantaged populations? What combinations of advocacy tactics – tactical repertoires – are most utilized by nonprofit organizations serving disadvantaged populations? Given variation in tactical repertoires, which combinations of tactics are perceived as most effective?

This paper makes several contributions to the literature on nonprofit advocacy. First, we focus our investigation on nonprofits that serve disadvantaged populations, an important subset of nonprofits because they can improve representation in our democracy. Second, we study the perception of advocacy outcomes, an overlooked aspect of nonprofit studies. Finally, in a departure from previous research, which focuses on specific advocacy tactics, we describe the tactical repertoires used by a sample of nonprofits serving disadvantaged populations and seek to understand how these repertoires are associated with the perceived effectiveness of advocacy outcomes.

2 Nonprofit Advocacy Tactics in Service of Disadvantaged Populations

The nonprofit advocacy literature examines how nonprofits engage in political and civic processes. Nonprofit advocacy work can take the form of more traditional policy work (educating constituencies or lobbying) or more sustained movement-like activities (such as a social media campaigns or petition drives). Nonprofit advocacy scholars agree on the importance of understanding the advocacy strategies used to address the needs of disadvantaged groups (Clear, Paull, and Holloway 2018;

Donaldson 2008). Disadvantaged populations, those that have been marginalized by society on the basis of their socioeconomic circumstances or identity, are underrepresented and disenfranchised (Pacheco and Plutzer 2008). Due to their familiarity with the communities they serve, nonprofits that serve disadvantaged populations may be better situated to represent them than other organizations (DeSantis 2010). For example, Lu (2015b) argued that human service organizations are uniquely positioned to serve clients and connect them with policymakers.

Questions about the relationship between advocacy and representation are particularly important given studies such as Strolovitch's (2006, 2008) work on "affirmative advocacy." Through her survey of national advocacy organizations representing women, racial minorities, and low-income people, Strolovitch found that, despite nonprofits' genuine interest in supporting disadvantaged populations, they are often "substantially less active when it comes to issues affecting disadvantaged subgroups than they are when it comes to issues affecting more advantaged subgroups" (2006: 894). Greater attention to advocacy by nonprofits that serve disadvantaged populations is needed to understand the tactics and effectiveness of such advocacy.

Nonprofits engage in policy advocacy using a variety of tactics (Almog-Bar and Schmid 2014; Mosley 2011). Tactics are the actions that nonprofits take when engaging in advocacy to achieve policy objectives. With some exceptions (Almog-Bar and Schmid 2014; Clear, Paull, and Holloway 2018; Fyall and Allard 2017; Mosley 2011; Zhang and Guo 2020), the literature on nonprofit advocacy and lobbying has yet to deeply explore variation in the use of different advocacy tactics. Understanding commonly used advocacy tactics can provide insight into how service-providing nonprofits advance constituent interests and engagement in the policy process.

Overall, nonprofits tend to use a combination of advocacy tactics (Onyx et al. 2010) but might prioritize one tactic over another depending on factors that include the target institutions (i.e. legislative body, government agencies, courts), the resources at their disposal, the level of access to government, and the competition and specialization that exists among nonprofits (Andrews and Edwards 2004; Arons and Berry 2003; Buffardi, Pekkanen, and Smith 2017; MacIndoe 2014). Research shows that nonprofits engaging in advocacy alter their approach according to their objectives (Clear, Paull, and Holloway 2018). Because nonprofits serving disadvantaged groups have unique objectives, we expect them to also rely on a unique set of advocacy tactics.

H1: Advocacy tactics used by nonprofits serving disadvantaged populations will be different than those of other nonprofits.

3 Tactical Repertoires in Nonprofit Advocacy

The sociological literature on social movements proposes the concept of tactical repertoires to understand the types of tactics groups take up. Tactical repertoires are “distinctive constellations of tactics and strategies developed overtime and used to act collectively in order to make claims on individuals and groups” (Taylor and VanDyke 2004, p. 265). The concept of tactical repertoires refers to the “toolkit” of a relatively narrow set of consistent tactics used by a particular collection of actors (Taylor and VanDyke 2004). The tactical repertoires selected by organizations are context-dependent and vary according to macro-historical trends. Tactics are shaped by internal and external pressures affecting an organization (Smithey 2009). For example, the growth of the internet has broadened the opportunities for participation of social movements (Van Laer and Van Aelst 2010).

Tactical repertoires also vary based on movement targets and goals (Balsiger 2010; Bernstein 2008). Walker and colleagues (2008) determined that social movements adapt their tactics based on whether their target is the state, a corporation, or an educational institution. They found that organizations tend to employ more disruptive tactics when targeting corporations and educational institutions since these targets do not have a monopoly on the use of force. Scholars also argue that organizations that align their repertoires with their missions increase the legitimacy of their actions (Beaton, MacIndoe, and Wang 2021; Selander and Jarvenpaa 2016). We expect that, like social movements, nonprofit advocates will also draw on consistent sets of tactics.

H2: We expect that nonprofit advocacy tactics will cluster into a set of discernable tactical repertoires that vary by organizational characteristics.

Given these factors, it is hard to predict how nonprofit advocacy tactics might cluster into tactical repertoires, but the literature on tactical repertoires and nonprofit advocacy offers some ideas. By far, the most common categorization of tactics across the social movement and nonprofit advocacy literature is the distinction between insider and outsider tactics (Andrews and Edwards 2004; Buffardi, Pekkanen, and Smith 2017; Clear, Paull, and Holloway 2018; Mosley 2011; Verschuere and De Corte 2015). Insider tactics are those that occur within the institutionalized political environment (e.g. talking with public officials), while outsider tactics are those that occur outside or beyond the confines of the institutional environment (e.g. grassroots lobbying) (Soule et al. 2006). Some research shows that insider tactics are more effective (Andrews and Caren 2010; Mosley 2011). Insider tactics create opportunities to incrementally influence policy (Berry and Arons 2003; Johansen and LeRoux 2013), and to procure additional funding which benefits client services (Mosley 2011).

Nonprofit scholars have identified a variety of additional ways to classify advocacy tactics that highlight the various philosophies, arenas, and participants involved. Many scholars emphasize the distinction between lobbying (direct contact with a legislator or public official about legislation) and more grassroots approaches (such as encouraging nonprofit stakeholders to mobilize) (Kimberlin 2010; Laws 1997; MacIndoe and Beaton 2019). Meanwhile, Duncan (2004) focused on the arenas where policy advocacy occurs and Mosley (2010) distinguished case advocacy from policy advocacy. Still other advocacy classifications focus on who is advocating. Both Berry and Arons 2003; Onyx et al. 2010 suggest that nonprofits rely more on institutional or administrative tactics, which may have less opportunity for constituents' participation. These various ways of conceptualizing advocacy highlight the continuum of advocacy activities in which organizations can and do engage.

4 Effectiveness of Nonprofit Advocacy Tactical Repertoires

A recent review of scholarship on nonprofit advocacy finds that the literature has not generally attended to issues of advocacy effectiveness (Ward et al. 2023). Assessing the effectiveness of advocacy poses a formidable challenge (Cameron 1986), partly due to the dependence of success on the varied and overlapping advocacy goals a nonprofit may have, including both social, policy, and organizational benefits (Carré et al. 2023; Lu 2015a; Mosley 2012). Research is only beginning to work through approaches to evaluating advocacy efforts (Arensman 2020; Coates and David 2002; Devlin-Foltz et al. 2012; Morariu and Brennan 2009). Within this limited literature, we know that not all advocacy efforts succeed, but many nonprofits do report at least some success in their advocacy efforts (Buffardi, Pekkanen, and Smith 2017; Clear, Paull, and Holloway 2018; Pawlak and Flynn 1990). We also know that a configuration of multiple conditions is necessary for effective advocacy (Zhang and Guo 2020) and the necessary factors may differ across states (Hoefer 2005). Studies show that access, resources, networking, and issue framing are all important factors in assessing advocacy success (Berry and Arons 2003; Hoefer 2000; Johansen and LeRoux 2013; Junk and Rasmussen 2019; Ruggiano et al. 2014).

Undoubtedly, the extent to which tactics are wisely selected will influence advocacy effectiveness. However, as Armstrong and Bernstein (2008) stated, “there is nothing obvious about what strategies will be the most effective in a given situation” (p.79), and we know that the perceived efficacy of different repertoires varies by organization – even between organizations in the same movement (Carmin and

Balser 2002). Indeed, scholars vary in their perspectives on the effectiveness of advocacy and the relationship between tactics and effectiveness. In their study of Seattle, WA nonprofits, Buffardi and colleagues (2017) found that reported policy change was associated with two tactics: providing expertise and attending meetings. Interestingly, they found that no tactics were statistically significant predictors of reported success in stopping or modifying policy, only in enacting policies.

As the social movement literature suggests, tactical repertoires matter for success (Taylor and VanDyke 2004), which leads us to expect that some combinations of advocacy tactics will be perceived as more effective than others. For instance, nonprofit advocacy scholars largely consider nonprofits as more reliant on insider tactics (Almog-Bar and Schmid 2014; Berry and Arons 2003; Donaldson 2007b; Onyx et al. 2010), and some scholars also associate these tactics with effectiveness. They argue that working ‘inside the system’ fosters important government and political relationships and creates opportunities to influence policy incrementally (Berry and Arons 2003; Johansen and LeRoux 2013). Still, some advocacy organizations stake their brand on the use of a tactical repertoire filled with radical, outsider tactics (e.g. Greenpeace; Barakso 2010). Research shows that nonprofits seek to identify the mix of advocacy tactics that align best with their purposes and resources (Clear, Paull, and Holloway 2018), and thus, certain tactical repertoires may contribute to advocacy success. Research has not yet tested whether tactical repertoires matter for nonprofit advocacy success, though we suspect, based on the literature, that they do.

H3: Tactical repertoires will differ in their association with the perception of more effective advocacy.

The social movement literature draws our attention to the variety of tactics in a tactical repertoire. This research suggests the use of a variety of tactics is likely to be more effective (Taylor and VanDyke 2004). Indeed, nonprofits that are more formalized and rely more heavily on government funding are known to draw on a larger tactical repertoire (Mosley 2011). Balsiger (2010) emphasizes that employing a variety of tactics is important because it helps to keep issues on the policy agenda. If tactics are deployed sequentially, they can garner more attention, generate urgency, and ultimately motivate action (Morris 1993). Thus, the social movements literature suggests that the number of tactics will be consequential for success.

H4: Tactical repertoires with a larger number of advocacy tactics will be associated with the perception of more effective nonprofit policy advocacy.

Beyond the types and number of tactics, the actors involved in advocacy may also influence the perceived effectiveness. For instance, we know that some nonprofits engage outside lobbyists and some may involve constituents in the advocacy process (Guo and Saxton 2010). Client involvement in advocacy can sharpen

organizational goals and lend greater legitimacy to the efforts as those directly affected weigh in. Onyx et al. (2010) conceptualized effective advocacy in terms of policy change but also considered the extent to which advocacy strategies involved the participation of constituents as a measure of their effectiveness. Therefore, we expect that client participation in advocacy efforts will affect success.

H5: Client/constituent participation in policy advocacy will be associated with the perception of more effective nonprofit policy advocacy.

In addition to tactical repertoires, any investigation of advocacy effectiveness will necessarily need to account for environmental and organizational factors. Given the limited research on advocacy effectiveness, we assume that factors contributing to the engagement in advocacy by nonprofits may also lead to greater chances of success. Research shows that the political environment is a factor for engagement and will likely also impact success (MacIndoe and Beaton 2019). Guo and Zhang (2014) found that regulatory and legal environments impact the scope and intensity of advocacy more than organizational characteristics. Similarly, LeRoux (2011) found that the principal challenges in enacting voter mobilization are state laws that restrict such activity. We also know that organizational factors will affect success (MacIndoe and Whalen 2013). Organizations with more government funding are known to engage in slightly more advocacy and use more insider tactics (Lu 2018a; Mosley 2010, 2012), as are larger, more professionalized nonprofits (Donaldson 2007a; Lu 2018b).

5 Methodology

5.1 Data and Sample

To investigate the types and effectiveness of advocacy tactics utilized by nonprofits serving disadvantaged populations, we draw on a survey of Massachusetts nonprofits. The 35-item online survey of nonprofit executive directors collected data about organizational features, the use of advocacy tactics, and the perceived effectiveness of policy advocacy. The survey was administered via Qualtrics in 2014–15 to a nonprofit sample that included members of the Massachusetts Nonprofit Network (MNN) ($N = 551$) and a matched sample of nonprofits ($N = 642$) drawn from the National Center for Charitable Statistics (NCCS) Business Master File (BMF) for Massachusetts. MNN is a statewide organization that supports the nonprofit sector via capacity building and advocacy. The combined sample response rate was 55 % ($N = 657$), with 67 % ($N = 368$) of MNN members responding and 45 % ($N = 289$) of

non-members responding. The sample was stratified by mission, proximity to Boston, and size. The sample excluded religious organizations and smaller nonprofits with less than \$25,000 in annual income that are not required to file with the Internal Revenue Service (IRS). Survey data were supplemented with information from the NCCS Private Charities Core data file (2014).

The survey was pre-tested using cognitive interviews with a small sample of Boston-area nonprofits; the survey was revised and then administered statewide from fall 2014 to spring 2015. An initial email introducing the purpose of the survey included the embedded survey link. Subsequent automated email reminders were sent (also with embedded survey links) to encourage participation. In addition, a robocall was broadcast to the survey sample. This brief, pre-recorded call reminded nonprofit managers about the survey and urged their participation. Finally, to incentivize completion, survey respondents were entered into a raffle for a chance to win a \$250 American Express gift card.

A comparison of the Massachusetts nonprofit population, the survey sample, respondents, and non-respondents provides some insight into the representativeness of the sample. The distribution of nonprofit mission areas in the sample mirrors that in the larger population, with human services comprising the largest category. There is also no statistically significant difference in the proximity of nonprofits to the greater Boston area in the sample versus the population. However, the survey sample included larger organizations, on average, when compared to the population. Likewise, survey respondents were generally larger (measured by revenues) than non-respondents in the survey.

Nonprofits serving disadvantaged populations were identified by their response to the question: "Please indicate the groups that your organization aims to serve through its programs and activities." Responses coded as serving disadvantaged populations included: disabled/special needs, LGBT, immigrants or refugees, racial or ethnic minority groups, and unemployed. Additional responses in an open-ended answer included: unhoused, economically disadvantaged, low-income, and disadvantaged children. Respondents could select more than one population from the list. Nonprofits that selected at least one of these groups, just under half of the sample (46 %), were coded as serving disadvantaged populations.

5.2 Analytical Approach

Our three research questions require different analytical approaches. In what follows, we reintroduce each of our research questions and describe the analyses utilized to answer those questions. Our first question asks: What advocacy tactics are most utilized by nonprofits serving disadvantaged populations? To answer this

question, we conduct an analysis of variance comparing the percentage of nonprofits serving disadvantaged populations using different advocacy tactics to the percentage of other nonprofits using those same tactics. To measure advocacy tactics, the survey provided a list of eleven advocacy tactics and asked respondents to select the activities they had used in the last year. Organizations that had used the tactic in the past year are coded 1, and those that did not are coded 0. Table 1 shows the analysis of variance conducted to identify the advocacy tactics used most frequently by organizations serving disadvantaged populations.

Table 1: ANOVA of advocacy tactics for nonprofits serving disadvantaged populations.

Advocacy tactic ^a	All nonprofits	Nonprofits <u>not</u> focused on disadvantaged populations	Nonprofits <u>serv</u> ing disadvantaged populations
<i>Insider tactics</i>			
Invited an elected official to a program or event	0.85	0.84	0.90*
Called or wrote a government official about a policy matter	0.70	0.68	0.74
Met with elected officials to discuss legislation	0.59	0.53	0.71***
Provided expert testimony at committee hearings	0.32	0.26	0.46***
Helped to develop government regulations	0.23	0.22	0.26
Assisted in drafting legislation	0.22	0.19	0.29*
<i>Outsider tactics</i>			
Used technology to educate public/members about policy issues	0.67	0.65	0.71
Wrote an op-ed piece or letter to the editor	0.42	0.38	0.50*
Mobilized the public to support or oppose specific legislation	0.35	0.32	0.43*
Worked to pass or defeat ballot measures/ referendums	0.19	0.16	0.25*
Released a research report	0.27	0.25	0.30

^aAdvocacy tactics are measured 1 if a nonprofit reports using it in the past year and 0 otherwise, so means yield the percentage of nonprofits using the tactic. ***p < 0.001, **p < 0.01, *p < 0.05.

Next, we turn to our second research question: What combinations of advocacy tactics – tactical repertoires – are most utilized by nonprofit organizations serving disadvantaged populations? To answer this question, we conduct a cluster analysis on the same set of advocacy tactics. In this way, we move beyond considerations of individual tactics to identify tactical repertoires – combinations of advocacy tactics – that nonprofits use. To discern whether certain advocacy tactics group together into a tactical repertoire, we conduct a k-means cluster analysis (Table 2, Panel A). A three-cluster solution emerged. This solution was confirmed by a silhouette score of 0.52 (Kodinariya and Makwana 2013). The silhouette score indicates how similar an object is to its own cluster compared to other clusters. The silhouette ranges from -1 to $+1$. A clustering with an average silhouette value over 0.5 is considered “reasonable.” Table 2, Panel A, shows how specific tactics array across repertoires. Table 2, Panel B, demonstrates the profile of organizations that utilize each tactical repertoire. Table 3 shows the frequency of individual tactics across tactical repertoires.

Our final research question is: Given variation in tactical repertoires, which combinations of tactics are perceived as most effective? We use regression analysis to examine how tactical repertoires and other factors are associated with perceptions of advocacy effectiveness.

5.2.1 Dependent Variable

In the literature on nonprofit advocacy, achieving policy change (or preventing change) is perhaps the clearest definition of advocacy effectiveness. For instance, Buffardi and colleagues (2017) examined effective advocacy in terms of reported policy change: whether nonprofits’ advocacy successfully enacted, stopped, or modified a specific policy. Other scholars have also relied on self-reported measures of advocacy effectiveness (Zhang and Guo 2020).

To measure perceived advocacy effectiveness, we created a scale based on a survey question asking about six policy outcomes: “For the last year, please indicate the extent of your agreement with the following statements”. Your organization’s lobbying or policy advocacy has resulted in:

- Greater capacity on the part of your constituency regarding policy advocacy
- Policies that positively impact your organizational capacity
- Increased government funding to your organization
- The defeat of policies that would negatively affect your organization or constituents
- Policies that positively impact the constituents you serve
- A greater awareness in your community about issues that impact our constituents

Table 2: Descriptives for tactical repertoires (N = 497).

Panel A. Mean of advocacy tactics by cluster	Tactical repertoire ^a		
	Meet and Greet	Proficient	Expert
Cluster membership (%)	68.0	24.1	7.9
<i>Insider tactics</i>			
Invited an elected official to a program or event	0.80	0.96	0.95
Called or wrote a government official about a policy matter	0.57	0.95	1.00
Met with elected officials to discuss legislation	0.43	0.89	1.00
Provided expert testimony at committee hearings	0.17	0.51	0.95
Helped to develop government regulations	0.11	0.38	0.87
Assisted in drafting legislation	0.11	0.32	0.90
<i>Outsider tactics</i>			
Used technology to educate public/members about policy issues	0.54	0.93	1.00
Wrote an op-ed piece or letter to the editor	0.29	0.63	0.90
Mobilized the public to support or oppose specific legislation	0.21	0.56	0.95
Worked to pass or defeat ballot measures/referendums	0.12	0.32	0.38
Released a research report	0.20	0.33	0.67
Panel B. Descriptives for tactical repertoires	Meet and		
	Greet	Proficient	Expert
Average perception of policy effectiveness (0-6)	1.53	3.65	4.13
Nonprofits serving disadvantaged populations	66.1	26.3	7.6
Mean size of tactical repertoire (0-11)	3.6	6.8	9.6
Mean organizational size (ln)	7.0	10.5	14.1
Mean organizational age (years)	25.7	29.6	27.5
Human service mission	26.9	28.8	15.4
Mean percentage government funding	24.7	38.4	27.9
Client participation in tactics	17.7	38.9	46.0
Have staff member who is lobbyist	1.8	12.5	59.0
Employ external lobbyists	6.3	7.4	43.2

^aBoxes in Panel A identify tactics used by more than 50 % of the cluster.

Table 3: Mean frequency of tactics by tactical repertoire (*N* = 497).

Mean frequency of advocacy tactics	Tactical repertoire ^a		
	Meet and Greet	Proficient	Expert
Frequency in the last year: 0=Never, 1=1-2 times, 2=3-5 times, 3=6 or more times			
<i>Insider tactics</i>			
Invited an elected official to a program or event	1.2	2.2	2.3
Called or wrote a government official about a policy matter	0.7	2.1	2.9
Met with elected officials to discuss legislation	0.5	1.8	2.8
Provided expert testimony at committee hearings	0.2	0.6	2.2
Helped to develop government regulations	0.1	0.5	1.7
Assisted in drafting legislation	0.1	0.3	1.6
<i>Outsider tactics</i>			
Used technology to educate public/members about policy issues	0.8	2.3	3.0
Wrote an op-ed piece or letter to the editor	0.3	0.8	1.7
Mobilized the public to support or oppose specific legislation	0.2	0.9	2.4
Worked to pass or defeat ballot measures/referendums	0.2	0.4	0.6
Released a research report	0.2	0.4	1.0

^aBoxes identify tactics used by more than 50 % of the cluster.

Responses included “strongly agree,” “agree,” “disagree,” and “strongly disagree.” Responses indicating any level of agreement were coded as 1, while responses indicating any level of disagreement were coded as 0. The resulting scale of advocacy effectiveness ranges from 0 to 6 with a strong Cronbach’s alpha of 0.86.

5.2.2 Independent Variables

5.2.2.1 Tactical Repertoires

To investigate the relationship between tactical repertoires and perceived effectiveness, we examine the following:

Tactical repertoires. This variable captures the three clusters identified above that describe different combinations of advocacy tactics.

Size of tactical repertoire. We measure the size of a tactical repertoire as a count of 11 advocacy tactics reported by a nonprofit.

Client participation in tactics. This variable captures responses to the question, “Who participates in lobbying or policy advocacy in your organization?” Respondents were instructed to check all from a list that included “clients/constituents.”

5.2.2.2 Organizational and Environmental Controls

We also included variables capturing various organizational attributes, including organizational size and age, human service mission (the largest mission category in the data), and organizational capacity. In addition, we included controls for reliance on government funding and perceived friendliness of the local and state policy environment. See Table 4 for descriptive statistics on the variables included in the regression analysis. See Table 5 for variable correlations.

6 Findings

Forty-six percent of nonprofits in the sample reported serving disadvantaged populations. Nonprofits serving disadvantaged populations are statistically more likely (75.3 %) to engage in advocacy than other nonprofits (56.9 %) (ANOVA significant at $p < 0.001$). This finding concurs with recent national data showing that nonprofits serving low-income communities (one measure of disadvantage) engage in advocacy at a higher level than other nonprofits (Faulk, Kim, and MacIndoe 2023) .

6.1 Advocacy Tactics

First, we considered how the tactics of nonprofits serving disadvantaged populations compare to other nonprofits. As shown in Table 1, we examined how nonprofits employed 11 tactics drawn from previous nonprofit advocacy research. Four tactics stand out as being utilized by more than 50 percent of all nonprofits. These are a mix of outsider and insider tactics including: inviting an elected official to a program or event, meeting with elected officials to discuss legislation, calling or writing a government official about a policy matter, and using technology to educate the public or nonprofit constituents about a policy matter.

Table 1 provides the results from an analysis of variance comparing tactics used by a subsample of nonprofits serving disadvantaged populations compared to other

Table 4: Descriptives.

Dependent variable	Variable measurement ^a	Mean	SD	Min	Max
Scale of policy advocacy effectiveness	Scale of 6 policy outcomes ^b	2.24	2.19	0	6
Independent variables					
Organizational and environmental controls					
Organizational size	Organizational revenues (natural log) in 2014 ^c	8.60	4.92	0	21
Organizational age	Age in 2014 calculated using IRS rule date ^d	26.88	18.81	2	92
Human service mission	Human service mission per the NTEE ^d	0.36	0.48	0	1
Organizational capacity	Additive scale measuring organizational capacity ^e	7.37	1.62	0	9
Percent government funding	Percentage of government funding	28.58	32.11	0	99
Favorable policy environment	Challenging local and state policy environment	0.65	0.83	0	2
Tactical repertoires					
Tactical repertoire					
Meet and Greet repertoire		0.68	0.47	0	1
Proficient repertoire		0.24	0.43	0	1
Expert repertoire		0.08	0.43	0	1
Size of tactical repertoire	Count of advocacy tactics	4.80	2.81	0	11
Client participation in tactics	Client/constituents participate in advocacy	0.26	0.44	0	1

^aUnless otherwise noted, data source is Massachusetts Nonprofit Advocacy Survey (2014–15). ^bCronbach's alpha for advocacy effectiveness scale: 0.86. Additive scale. ^cData source: National Center for Charitable Statistics, Core Private Charities File, 2014. ^dThe National Taxonomy for Exempt Entities is the national standard for classifying nonprofits by their primary activity. ^eCronbach's alpha for organizational capacity scale: 0.72. Additive scale (0–9) indicating presence of computerized financial records; computerized client/program records; written conflict of interest policy; written fundraising plan; annual report; evaluation of program outcomes; audited financial statement; dedicated office space; and a social networking presence.

Table 5: Correlations.

	1	2	3	4	5	6	7	8	9	10	11
1 Organizational Size	1.00										
2 Organizational Age	0.31 ***	1.00									
3 Human Service Mission	0.05	0.05	1.00								
4 Organizational Capacity	0.22 ***	0.24 ***	0.05	1.00							
5 Percentage Govt Funding	0.08	0.02	0.18 ***	0.08	1.00						
6 Favorable Policy Environment	0.07	-0.02	0.01	0.17 ***	-0.03	1.00					
7 Meet and Greet	-0.13 **	-0.09	0.02	-0.18 **	-0.17 **	-0.09	1.00				
8 Proficient	0.12 **	0.09	-0.02	0.15 **	0.19 **	0.05	0.40 ***	1.00			
9 Expert	0.03	0.01	0.00	0.08	-0.01	0.07	0.50 ***	0.43 ***	1.00		
10 Size of Tactical Repertoire	0.14 **	0.10 *	0.04	0.26 **	0.24 **	0.06	1.00	0.65 ***	0.16 ***	1.00	
11 Client Participation in Tactics	0.01	0.04	0.07	0.10	0.21 ***	0.02	0.15 **	0.27 ***	-0.25 ***	0.18 ***	1.00

***p < 0.001, **p < 0.01, *p < 0.05.

nonprofits that do not. We find that nonprofits serving disadvantaged populations use both insider and outsider tactics and utilize all advocacy tactics at higher rates than other nonprofits. Interestingly, a mix of both insider and outsider tactics (seven altogether) are statically significant, with higher rates of use by nonprofits that serve disadvantaged populations. The top two tactics employed by these nonprofits are: inviting an elected official to a program or event (90 %) and calling or writing a government official about a policy matter (74 %). It is notable that most nonprofits serving disadvantaged populations engage in at least one form of lobbying. For example, 71 percent of nonprofits serving disadvantaged populations met with elected officials to discuss legislation. Hypothesis 1 is partially supported. We expected advocacy tactics used by nonprofits serving disadvantaged populations to be different than those of other nonprofits, however, we found they use similar tactics as other nonprofits but use them at higher rates.

6.2 Tactical Repertoires

To move beyond dyadic considerations of whether a nonprofit utilizes an advocacy tactic (or not) we conducted a cluster analysis of tactics to understand if they tend to group together. These tactical repertoires describe groups of tactics which nonprofits use in concert when pursuing their advocacy objectives. As shown in Table 2 (Panel A) a three-cluster solution emerged. We call the first tactical repertoire the Meet and Greet repertoire because the dominant tactic in this cluster is inviting an elected official to a nonprofit program or event. The Meet and Greet repertoire described 68 % of nonprofits in the sample (Table 2, Panel A) and 66 % of nonprofits that serve disadvantaged populations (Table 2, Panel B). These nonprofits use the tactics we investigated at lower rates than other nonprofits. The tactics in this repertoire also require the least resources (e.g. using technology like social media or email to inform people about policies).

We call the next tactical repertoire Proficient because it involves a greater number of tactics than the Meet and Greet repertoire and arguably requires more resources and skilled knowledge. For example, almost 90 % of nonprofits characterized as Proficient met with an elected official to discuss legislation. Fifty-six percent of this repertoire also worked to mobilize the public to support or oppose specific legislation, compared with only 21 % of the Meet and Greet cluster. The Proficient repertoire characterizes 24 % of nonprofits in the sample (Table 2, Panel A) and 26 % of nonprofits that serve disadvantaged populations (Table 2, Panel B). The final tactical repertoire, the Expert cluster, includes the greatest number of tactics and requires the most resources and expertise. For example, 90 % of Expert nonprofits assisted in drafting legislation, 95 % provided expert testimony at committee

hearings, and almost 90 % helped to develop government regulations. Sixty-seven percent of Expert nonprofits also released a research report that requires resources for data collection and analysis.

Table 2 (Panel B) describes how nonprofits utilizing these tactical repertoires differ. The repertoires describe increasing levels of advocacy involvement, advocacy capacity, and expertise. The number of advocacy tactics, perceptions of policy effectiveness, and engagement of clients in advocacy increase as one moves from the Meet and Greet cluster to the Experts. Interestingly, most nonprofits (Meet and Greet) evidence a small tactical repertoire characterized primarily by inviting an elected official to a program or event. The Proficient repertoire, used by most nonprofits serving disadvantaged populations, includes organizations that rely more on government funding than in other repertoires. The Expert repertoire is characterized by resource allocation to lobbying, with almost 60 % of this cluster having staff members who are lobbyists, and 43 % that employ external lobbyists. Hypothesis 2 is supported: advocacy tactics cluster into a set of tactical repertoires that vary by organizational characteristics. While we find evidence of tactical repertoires, it remains to be seen how these are associated with perceptions of policy effectiveness.

Table 3 shows how the frequency of specific tactics varies across the tactical repertoires. Not only does the specific mix of tactics vary across the repertoires, but the degree of engagement in them does as well. In all cases, tactics are more frequently used as one moves from the Meet and Greet, to the Proficient, and then to the Expert repertoires.

6.3 Perceived Advocacy Effectiveness

6.3.1 Organizational and Environmental Controls

The scholarship on engagement in nonprofit advocacy has found a range of organizational factors to be related to advocacy efforts. Most of these organizational controls (size, age, human service mission, capacity) were not statistically significant factors in our analysis of perceived advocacy effectiveness, suggesting that organizational characteristics may lead nonprofits to engage in advocacy, but those same characteristics do not necessarily lead to greater perceived effectiveness. Reliance on government funding and the nature of the policy environment were exceptions, which were both significantly and positively associated with perceptions of success (Table 6).

Table 6: OLS regression of tactical repertoires on advocacy outcomes for nonprofits serving disadvantaged populations ($N = 301$).

	Standardized coefficient	Standard error	t		VIF
Organizational and environmental controls					
Organizational size (revenues)	−0.007	0.016	−0.13		1.18
Organizational age	−0.009	0.006	−0.19		1.16
Human service mission	−0.046	0.207	−0.94		1.06
Organizational capacity	−0.036	0.073	−0.71		1.14
Percent government funding	0.115	0.003	2.23	**	1.17
Favorable policy environment	0.156	0.129	3.19	**	1.06
Tactical repertoires					
Size of tactical repertoire	0.466	0.052	7.07	***	1.92
Proficient repertoire ^a	0.137	0.265	2.33	*	1.54
Expert repertoire ^a	0.002	0.497	0.03		1.65
Client participation in tactics	0.129	0.228	2.56	**	1.12
Adjusted R-squared	0.376				

^aMeet and Greet is the tactical repertoire serving as the reference category in the regression. *** $p < 0.001$, ** $p < 0.01$, * $p < 0.05$.

6.3.2 Tactical Repertoires

We found that the nature of tactical repertoires – the combinations of advocacy tactics – was also significantly associated with perceptions of advocacy effectiveness (Table 6). When compared to the reference category of the Meet and Greet repertoire, the Proficient repertoire was positively and significantly associated (0.137, $p < 0.001$) with perceptions of advocacy effectiveness, while the Expert repertoire was not significantly associated with the perception of advocacy effectiveness. Hypothesis 3 is supported; tactical repertoires are significantly associated with perceptions of advocacy effectiveness. We also found that the size of a nonprofit’s tactical repertoire was significantly and positively associated (0.466, $p < 0.001$) with perceptions of successful advocacy. Hypothesis 4 is supported. Finally, client involvement in a tactical repertoire is significantly and positively associated (0.219, $p < 0.01$) with the perception of advocacy effectiveness. Hypothesis 5 is supported.

7 Discussion

Nonprofits serving disadvantaged populations can strengthen democracy and communities by voicing the interests of marginalized groups within the democratic process. The sociological literature on social movements indicates that the tactical

repertoires of organizations matter for success (Taylor and VanDyke 2004). This study examines the tactical repertoires of nonprofits serving disadvantaged groups and investigates the perceived effectiveness of such advocacy. We make important contributions to the study of nonprofit advocacy through the application of the concept of tactical repertoires and a focus on advocacy effectiveness. Our findings also have implications for the leaders of nonprofits serving disadvantaged groups looking to represent their clients' interests more effectively.

7.1 Tactical Repertoires in Nonprofit Advocacy

To our knowledge, this is the first time that advocacy tactics have been inductively studied as repertoires rather than given *a priori* meaning (e.g. the most widely used categorization of which is insider/outsider). Previous research has focused on nonprofits' use and preference for specific advocacy tactics (Buffardi, Pekkanen, and Smith 2017; Mosley 2011). Our study builds on this work, seeking to understand how specific tactics are used in concert as tactical repertoires. Upon clustering advocacy tactics into tactical repertoires based on nonprofit co-occurrence, we find three dominant tactical repertoires all of which include a combination of insider and outsider strategies (Table 1, Panel A). Nonprofits across all repertoires do not focus exclusively on insider or outsider tactics; rather, they pursue a blend of approaches: mobilizing resources outside the formal political process and applying expertise to work within the political system. Some previous research found that insider tactics may be more prevalent or effective in achieving policy change (Hoefer 2005; Mosley 2011; Onyx et al. 2010; Rees 1999). Other research suggests that the combination of insider and outsider may be most effective (Zhang and Guo 2020). We find that the combination of insider and outsider tactics, which characterize the Proficient repertoire, are perceived to be the most effective. Related research suggests that nonprofits might sequence their advocacy work, pursuing more disruptive outsider tactics only after building relationships via insider tactics (Almog-Bar and Schmid 2014), but our results suggest that both insider and outsider tactics are frequently used at the same time.

The distinctiveness of the three repertoires is reinforced through the examination of other information in the data (Table 2, Panel B). Greater engagement across the tactical repertoires is evident through the increasing size of the tactical repertoire (number of tactics), more than doubling between nonprofits in the Meet and Greet and Expert repertoires. Greater expertise is also demonstrated by increasing numbers of internal and external lobbyists used by nonprofits across the tactical repertoires. Not only does expertise increase across the repertoires, but the frequency of participation in tactics increases as well (Table 3). Interestingly, without

holding other factors constant, the repertoires are also associated with an increasing perception of advocacy effectiveness. Nonprofits using the Proficient repertoire perceive their effectiveness to be more than twice that of the Meet and Greet nonprofits.

7.2 Perceived Nonprofit Advocacy Effectiveness

To date, little research has examined the efficacy of nonprofit advocacy (Ward et al. 2023). Advocacy success is important for many reasons, not the least of which is the ability to garner greater resources for a nonprofit's mission. In addition to resources, advocacy can impact both outcomes and processes of public policy, securing more favorable legislation and regulations for nonprofits and the sector. Our analysis identifies a variety of factors that nonprofit serving disadvantaged populations perceive as contributing to their level of advocacy success.

In our study, nonprofits drawing on the Expert tactical repertoire were the most engaged in advocacy as indicated by the size of their tactical repertoire and frequency of their engagement. However, the Proficient tactical repertoire was perceived as the most effective combination of tactics (Table 6) when other factors are held constant. It is interesting that the Proficient repertoire is associated with the perception of more effective advocacy (compared to the Meet and Greet repertoire), especially considering that the Expert repertoire includes the same strategies, supplemented by more tactics. The additional tactics in the Expert repertoire (helping with developing government regulations, drafting legislation, and releasing a research report) are used at lower rates than other tactics in the repertoire (Table 3) and might be less effective in achieving advocacy success than other tactics. Nonprofits that employ the Expert repertoire might have more realistic expectations of their advocacy success, with expectations tempered by their greater understanding of – and participation in – the policy process. Alternatively, Expert organizations could have higher standards for success, engaging as they do in more insider tactics. They could, therefore, be less likely to report successful advocacy. Although the Meet and Greet repertoire, characterizing 68 % of nonprofits, was perceived as the least effective repertoire, organizations drawing on this repertoire still achieved an average of 1.5 positive advocacy outcomes during the year (see Table 3).

The size of tactical repertoires and the organizational actors who participate in them also matter to perceived advocacy effectiveness. The number of advocacy tactics a nonprofit used was associated with the perception of greater advocacy effectiveness (see Table 6). Previous research finds that larger tactical repertoires associated with insider tactics (Mosley 2011) are important to effective advocacy. Client participation in advocacy was also significant and positively associated with

the perception of advocacy success. Increasingly, nonprofit research has considered the issue of representation and nonprofit advocacy, typically examining characteristics of nonprofit boards and leaders (Guo and Zhang 2013; Kim and Mason 2018; LeRoux 2009). In Guo and Saxton's (2010) study of the effect of descriptive and participatory representation on nonprofit advocacy, they found constituent involvement in decision-making is positively related to the level of advocacy engagement. Our study contributes to this literature by examining whether client participation in advocacy tactics matters for perceived effectiveness and we find that it does.

7.3 Nonprofit Advocacy Among Nonprofits Serving Disadvantaged Populations

Studying how nonprofits serving disadvantaged groups use advocacy, and how they perceive success, is important because these organizations can represent disenfranchised and marginalized groups in the democratic process. Our findings show that nonprofits serving disadvantaged groups are engaging in a wide array of advocacy tactics at higher rates than other types of organizations. The analysis of tactical repertoires shows that the distribution of nonprofits serving disadvantaged populations across repertoires tracks that of other nonprofits.

Most nonprofits serving disadvantaged groups are described by the Meet and Greet repertoire. These nonprofits invite elected officials to their programs or contact them about policy matters about once a year. A little over a quarter of nonprofits serving disadvantaged groups are using a Proficient tactical repertoire, which our findings suggest is perceived as the most effective set of tactics. These nonprofits have a larger tactical repertoire, greater reliance on government funding, and over twice the participation of clients in advocacy than do the Meet and Greet nonprofits. In addition, they are almost seven times more likely to have a staff member who is a lobbyist. Finally, some nonprofits (7.6 %) that serve disadvantaged populations are characterized by the Expert tactical repertoire (Table 2, Panel B). These nonprofits use the greatest number of tactics at the greatest frequency. Interestingly, this repertoire has a higher perception of effectiveness but is not distinguishable from the Meet and Greet repertoire in our regression analysis (Table 6). Our findings suggest how nonprofits serving disadvantaged populations might boost the perceived effectiveness of some organizations, which could have beneficial impacts on their beneficiaries. Our analysis suggests that several aspects of tactical repertoires, including the size and who participates, impact the perception of advocacy effectiveness. Nonprofits could use more tactics and involve their clients in advocacy.

This discussion of our findings would not be complete without a recognition of the study's limitations. First, this research is based on a sample of nonprofits in Massachusetts. While much research on the nonprofit sector is grounded in analyses of specific geographical regions (Grønbjerg 2001; Joassart-Marcelli and Wolch 2003), our study's findings should be generalized with care to other regions. Second, this is a study of nonprofit managers' reports of using advocacy tactics and perceptions of effective advocacy outcomes. Like other analyses of advocacy effectiveness (Bell, Fryar, and Johnson 2020; Zhang and Guo 2020), and nonprofit research generally, our analysis of advocacy outcomes is based on the perceptions of survey respondents. Nonprofit executives' evaluations of advocacy success are important because they form the basis for organizational decisions and actions. Indeed, scholars have called for research on how nonprofit leaders evaluate the success of advocacy (Clear, Paull, and Holloway 2018). Future research might investigate the passage of specific legislation and receipt of specific funding. Finally, our survey instrument asked about engagement in a specific group of tactics. While informed by previous research, it may be the case that nonprofit respondents engage in tactics that were not included in the survey. Our findings should be interpreted with these limitations in mind.

8 Conclusions

Nonprofit scholars emphasize the important role that nonprofits play in providing democratic representation on behalf of the disadvantaged, but little research examines the specific tactics that would most effectively help organizations fulfill this role. This study begins to address these questions, finding that nonprofits serving disadvantaged populations perceive themselves to be relatively effective in many of their policy efforts, but there is also room for improvement. Further, our research shows that nonprofits use tactical repertoires in their advocacy work. These repertoires are associated with organizational characteristics, varying frequencies of tactical use and breadth, and are also associated with the perceived effectiveness of nonprofits' advocacy efforts.

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