

LESSONS FOR THE NARRATIVE CURIOUS

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CZI's Emergent Approach to Narrative Investments



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Foreword

The Chan Zuckerberg Initiative's (CZI) Housing Affordability program is dedicated to improving housing affordability and access so people from all backgrounds and income levels can live, work, and thrive in California. Shifting the housing narrative is a key part of building and sustaining public support to stably and affordably house all 40 million California residents.

Today, our housing narrative portfolio funds 10 partner organizations across the state. Collectively, these organizations represent the breadth, reach, vision, and leadership needed to build and shift our statewide housing narrative to one in which Californians believe in a future where everyone has access to a safe, stable, and affordable place to call home. However, it is also important to note that CZI is just one of a handful of funders invested in the work of narrative change across the state.

To be clear, one foundation alone cannot single-handedly address the colossal housing narrative challenges in front of us. Our vision to reshape California's housing conversation requires a collaborative effort, one that transcends organizational boundaries, issue silos, and budgets.

This brief serves as a snapshot of our team's evolving approach to resourcing narrative work to build public support for housing reform in California. We offer our early reflections, learnings, and questions here as a stepping stone for fellow funders at various stages of their own narrative change efforts.

We hold both the urgency and real-world implications of our narrative investments.

As funders, we can easily lose ourselves in the intellectual exercise of narrative work. But for those on the frontlines of our housing affordability crisis, narrative change carries the real promise of ensuring everyone has a dignified place to call home. By building narrative power with, within, and on behalf of communities impacted by California's housing affordability crisis, we hope to create a shift in what is possible and make a meaningful and material impact in the lives of those currently or at risk of experiencing housing insecurity.

With that, we invite you — the narrative curious — to join us in our work to wield narrative change as a tool to reimagine and build the future we hope to achieve.



Evolution of CZI's Housing Narrative Project

From our program's start, we consistently heard from our housing partners across California about the need for a more effective, longer-horizon statewide narrative approach that would help them make progress and ultimately win on housing reform across the state. This new narrative approach needed to connect and unpack parallel narrative threads such as the government's role in housing, how people experience the economy, perceptions of who belongs and who is deserving in our communities, and ideologies about who has the power to make decisions and be involved.



First Annual Convening of CZI's Housing Narrative Partner Program: April 2022

CZI's narrative journey — like so many funders before us — started with research. ¹Our in-house [Public Opinion and Survey Science \(POPSS\) research team](#) — in collaboration with a steering committee of housing advocates from across California — led a multi-year, mixed-methods research process to understand how California voters come to the table on issues related to housing. The first phase of our narrative research (summarized in [this white paper](#)) unearthed new ways of understanding audiences across California that transcended typical boundaries of geography, race, class, gender, and political affiliation. Since then, we continue to conduct research, grounded in the needs of our grantees with the aim of equipping the housing field with data-informed research on what narratives, frames, and messages could meet audiences where they're at and move them over the long term toward a new, more productive housing conversation.

We quickly learned that in addition to providing the research, we needed to support the capacity of our housing advocates and the infrastructure of the larger narrative ecosystem they operate within so they could more effectively metabolize and deploy research insights across their organizations and networks. This reorientation from a research-driven effort to one that centered field building and narrative infrastructure did not happen overnight; it emerged over the course of key program decisions and milestones, which are outlined in the table below.

Over time we embraced an intentionally iterative and emergent process — working alongside our grantees to co-develop what our program needed to look like and what capacity, convening, and strategic support we could provide.

Today, our Housing Narrative Partner Program funds 10 housing advocacy and base-building organizations across California. Collectively, our program partners represent over 100 local organizations, lead 25 coalitions, and participate in an additional 19 coalitions throughout the state. These narrative partners were selected because they represent the breadth, diversity, reach, know-how, vision, and leadership that we need to activate target constituencies and boldly reshape our housing conversation to build and sustain public and political will for housing reform.

“ The combination of CZI's research and its collaborative approach in this project has resulted in helpful resources and meaningful connections between like-minded organizations. I love the opportunity to strategize for the long term so we can drive lasting systemic change.

Jessamyn Garner
Marketing & Communications Director
at YIMBY Action

¹Since we started this work in 2018, the body of housing narrative research (federally, state, regionally) has evolved and is now quite robust. New funder partners to this work no longer need to start from the ground-up, and can leverage the experiences and expertise of existing leaders in the space to help determine where opportunities to join the work exist. Please see the appendix for a curated sample of some of this literature base.

Important note: these groups do not all necessarily agree on policy priorities or narrative strategies. And that's okay. The reality is we need all of them to build and sustain the necessary storytelling and big-tent narrative power to move our conversation to a place where Californians recognize the right to a safe, stable, and affordable home for everyone. We have learned that leaning into our role as a convener can help create important opportunities for our diverse set of partners to work more closely and cohesively, gain greater visibility into peer narrative priorities, inform

our evolving program design, and surface unlikely opportunities for collaboration and experimentation. Lastly, don't underestimate the power of unstructured social time at funder-grantee convenings, which can help facilitate cross-cohort relationship and trust building.

Our integrated grantmaking and research program hopes to serve as an ongoing resource and container for partners to experiment with, collaborate on, and surface alignment opportunities for data-driven narrative approaches up and down the state.

“ CZI's powerful leadership and investment in narrative change has planted seeds (see [Everyone In LA campaign](#) & [Our Future LA coalition](#)) that are taking root across California. To bear fruit, those seeds will require food and water from additional funding partners and organizations on the ground, but CZI's first six years have made clear the promise and challenge of achieving narrative change. For the sake of California's future prosperity, it is critical that this important work continue and expand.

Tommy Newman
VP, United Way of Greater L.A.

“ CZI's original research on audiences and the 5 typologies of Californians on the housing issue has been invaluable in helping us be clear about who we can target with our narratives and messaging — and also, who we can't. Getting clear on this key strategic question is something we could not have done on our own; CZI's contribution in this regard has been singular.

Matthew Lewis
Director of Communications, California YIMBY

“ CZI's Housing Affordability team is strengthening the work of leading change makers with research and resources that support narrative strategy work and social contract stewardship. Consensus has emerged. If transformative investments follow, then so will the shift needed to advance policy solutions at scale.

Unai Montes-Irueste
Narrative & Strategic Communications Director, Housing California

PHASE 1 (2017-2021)

Field learning, convening partners, research

FIELD-WIDE LEARNING.

CZI launched the California Housing Narrative Learning Lab to bring together over 200 participants from 90 organizations across the state for an eight-part virtual narrative learning series that offered baseline narrative training, peer sharing, office hour workshops, and individual coaching.

RESEARCH FOUNDATION.

CZI disseminated the bulk of learning from the original multiphase study by launching a new advocate-oriented toolkit website that built off our published narrative research and provided the larger housing advocacy ecosystem with a practical resource to help put these narrative insights immediately into practice.

ALIGNING ON A NARRATIVE NORTH STAR.

As the work evolved and more partners joined the effort, we worked to develop a shared line of sight toward the collective project's goals and outcomes. The development of a visual theory of change promoted alignment on our narrative north star and catalyzed the decision to embed a grantee-centered monitoring, evaluation, and learning (MEL) approach.

PHASE 2 (2021-ONGOING)

Deeper multi-year grantmaking

SEED GRANTS.

CZI placed 5 six-month learning grants (\$100,000 each) across 5 organizations to give a set of partners the resources and time to imagine what investments were needed to support more effective narrative efforts over the long term. Learning grant recipients came together virtually. Together, these early partners helped inform our emerging narrative program.

EMBEDDED MEL.

CZI enlisted a monitoring, evaluation, and learning (MEL) partner to work alongside narrative grantees to co-develop an MEL framework to collectively measure progress and success at the cohort-wide and grantee-specific levels.

CONVENING SUPPORT.

CZI brought our partners together virtually and in person for relationship and trust building, as well as peer learning and collaboration opportunities.

MULTI-YEAR GRANTMAKING PROGRAM.

CZI placed multi-year grants (ranging between \$100,000-\$400,000 annually) to support existing and new narrative partners to test, iterate, internalize, and deploy effective narratives and messages at scale with target constituencies. These organizations received c3 core support grants and were provided opportunities to convene in order to foster increased collaboration, learning, and impact.

PHASE 3 (GETTING UNDERWAY)

Scale and integration

EMERGENT, FIELD-INFORMED RESEARCH AGENDA AND LEARNINGS.

CZI's in-house POPSS team continues to work collaboratively with grantee partners and other narrative researchers to share findings and co-develop an emergent research agenda rooted in the field. In addition, the POPSS team regularly measures California public awareness, salience, and sentiment toward key housing north stars and housing affordability policies in order to evaluate the effectiveness of nascent narrative change efforts on housing in the state. This tracker also includes an omnibus section that provides space for CZI partners and grantees to ask one-off timely questions.

FUNDER COORDINATION.

CZI recognizes the importance of aligning other funders over the longer term for coordinated impact and scale. This includes ongoing relationships, trust building, and learning with peer funders who are making similar investments in the field.

DEDICATED SPACE FOR PEER SHARING, COORDINATION, AND ALIGNMENT.

CZI is excited to offer regular facilitated group space for partners to share insights and learnings around implementation and experimentation of narrative research.

Recommendations for an Emergent Narrative Grantmaking Program

As we reflect on our work over the past few years, we've identified four focus areas that have benefited our narrative grantmaking program. We offer these recommendations and subsequent reflection questions as guideposts for fellow funders engaged at various points in their narrative grantmaking efforts.



Invest in narrative people.



Center those working on the frontlines in ongoing research and measurement efforts.



Provide technical assistance to help practitioners put research into practice.



Foster ongoing convening and partnership opportunities.

1. INVEST IN NARRATIVE PEOPLE.

Narrative power is not possible without narrative people. To that end, the first recommendation for any narrative grantmaking program is to invest in the organizations and people who will be critical to narrative and communications work. We are learning that “narrative” work — much like the emergence of “digital” work — should be embedded as a core competency across organizational functions, not just within traditional communications roles.

A dedicated narrative or communications role is necessary but insufficient to build and sustain real narrative power. Everyone in the organization needs to see themselves as narrative practitioners.

We found that organizations lucky enough to have a narrative-savvy senior communications leader often lacked the additional communications staff capacity and bandwidth to infuse narrative and strategic communications across the organization.

RECOMMENDATION:

- Consider placing multi-year grants (on top of existing general operating support) that are earmarked for narrative and communications capacity. These “core support” grants will enable partners to recruit, hire, train, and deploy dedicated narrative strategists and communications leaders who are equipped to lead and embed narrative work within their organizations and across statewide coalitions.

2. CENTER THOSE WORKING ON THE FRONTLINES IN ONGOING RESEARCH AND MEASUREMENT EFFORTS.

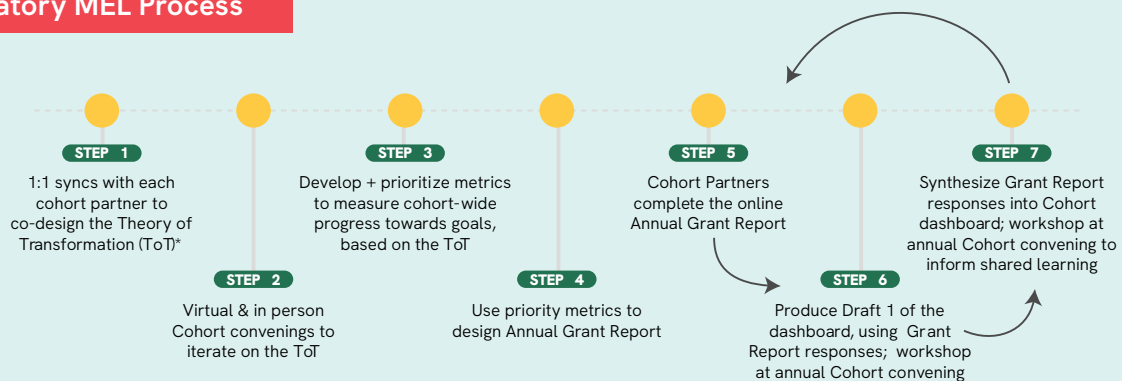
Over the course of our grantmaking program, **we worked to consistently ground our research objectives² with the real needs of the field, provide ample opportunities to pressure test assumptions and survey design with those closest to the work, and facilitate spaces (virtually and in person) to make meaning of the research findings together.**

In addition to supporting research, we also worked with our grantees to co-design and embed a monitoring, evaluation, and learning (MEL) framework into the program from the beginning. **The participatory process sought to ensure grant reporting was driven by learning and collaboration rather than accountability.** The intention of the equity-centered and participatory MEL process was to hold CZI accountable to grantees, rather than the other way around. By centering grantees in our MEL process, we observed groups (who might otherwise disagree on policy priorities) begin to articulate and refine shared longer-term narrative outcomes and success indicators that signaled possibilities for future alignment and coordination. (See our participatory MEL process timeline below).

RECOMMENDATIONS:

- Ensure your narrative research is informed by grantees and provide ample opportunities to include your grantees in the process of making meaning of your research.
- Consider a participatory approach to your MEL efforts, finding ways to co-design how you will be monitoring and measuring success with your grantees.
- Research can be one of the more expensive line items in a narrative budget. Consider ways to absorb or centralize the cost of research and share findings with a larger set of grantees engaged in related narrative work.

Participatory MEL Process



* A Theory of Transformation (ToT) is a visual mapping of how individual grantees' Theories of Change converge and complement one another to contribute to systems change. The ToT connects CZI's role in enabling grantees in the broader narrative ecosystem.

²The core strategies in CZI's housing narrative research are to 1) deeply understand the audiences grantees throughout the state want to talk to; 2) quantify the narratives that audiences are exposed to through media and the internalized narratives through which people make sense of the housing crisis in the state; and then 3) develop and test ways to shift away from narratives that serve as barriers to the housing solutions in the state and toward narratives that are more supportive of housing solutions.

3. PROVIDE TECHNICAL ASSISTANCE TO HELP PRACTITIONERS PUT RESEARCH INTO PRACTICE.

As we familiarized ourselves with the existing narrative research landscape at the national, state, and local level, we observed that **the onus to connect the dots across research studies often falls on stretched-thin advocates.**

To address this tension point, we sought to offer technical assistance for implementation and research application. **We are exploring how to support an ongoing facilitated space for partners to more regularly share insights and learnings around implementation and experimentation of narrative research.**

RECOMMENDATION:

- Beyond financial support, additional technical assistance (1-on-1 coaching, baseline skills trainings, and peer sharing) should be prioritized to help advocates better translate and implement research insights into their day-to-day work.

4. FOSTER ONGOING CONVENING AND PARTNERSHIP OPPORTUNITIES.

While having organizations with dedicated narrative people capacity is a critical first step, there must also be **intentional time and space dedicated to building relationships and fostering trust across partners.** This helps facilitate a narrative network effect that builds relationships across organizations and among coalitions. From the onset of our narrative partner program, partners asked us to lean into our role as conveners. To that end, we worked to forge connections between grantees, CZI staff, and consultants to collaborate around shared narrative insights and capacity needs. We hosted virtual learning sessions, research briefings, and in-person convenings so partners could come together to make sense of our research, learn from one another, build a foundation of trust, and surface possible collaboration opportunities. Grantees reported that these dedicated convenings helped foster open and honest dialogue, break through ideological barriers, and create space for longer-term thinking about shared narrative strategy and investments.

RECOMMENDATIONS:

- Funders of narrative work have an important convening role to play in providing grantees with opportunities to come together to share learnings, inform an applied research agenda, gain greater visibility into peer narrative priorities, and surface opportunities to better coordinate and align on North Star narrative and campaign goals.
- Prioritize unstructured social time at funder-grantee convenings and gatherings to facilitate cross-cohort relationship and trust building.

Conclusion and Call to Action

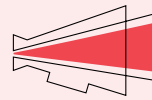
The scale of the challenge and opportunity in shifting hearts and minds is infinitely greater than what one funder or one cohort can hope to tackle in isolation.

While we are excited by many conversations with our philanthropic peers who are actively investing in narrative work in California and beyond, we are just at the beginning of our efforts to catalyze and align new investments to meet our narrative challenges head on in the coming years.

We believe that if funders can more readily collaborate on longer-term narrative change investment plans that cut across funding, institutions, and issue siloes, then we will be better positioned to build and sustain public will not just for housing affordability but also for other interconnected fights for equity and justice.

To date, the current scale of pooled investment is nowhere near commensurate with what is needed for the sustained work of shifting public perceptions and attitudes in order to create concrete, meaningful

changes in policy and practice.³ However, progress has been made in bringing funders together in shared learning and practice. We must continue to build on that progress to secure longer-term commitments and evolve our collective understanding of what it takes to resource a multi-issue narrative ecosystem that can meet the moment.



Call to Action

If you've read this far and would like to follow up on any of the work or recommendations outlined in this brief, feel free to reach out to narrative@chan Zuckerberg.com. We are excited to be in continued learning and partnership with the narrative curious.

“ Shifting how segments of the public think about issues as important as housing doesn't just take the right messaging, it takes a fleet of voices moving in unison. When Shift the Bay set out to organize the Bay Area housing ecosystem, early, multi-year investments in our coalition capacity-building were a game changer. These investments strengthened our region's capacity for the long-term needs of narrative strategy at large, while building meaningful trust and infrastructure to advance our movement goals with shared strategies. CZI's support prepared Shift the Bay to build new vehicles that can advance new narratives through targeted, coordinated public engagement. Now, the field is primed for philanthropic partners to put wind to these readied sails.

Alina Harway
Communications Director,
Non-Profit Housing Association of Northern California & lead on Shift the Bay

³As a point of comparison, from 2004 to 2015, [the Civil Marriage Collaborative and its funders](#) contributed \$153 million (or about \$14 million per year) to build and strengthen a broad and diverse grassroots constituency and powerful public education apparatus to advance the marriage equality movement.

Reflection Questions to Design a Narrative Strategy

- What narrative(s) would enable and sustain the success of your grantmaking priorities? What narrative(s) stand in the way?
- What role does narrative change play in your current grantmaking strategy? Does your overall program strategy specifically name narrative power as a lever for change? If so, what would this narrative power help unlock? If not, how might you start to build the case for prioritizing narrative investments at your institution?
- What does long-term success look like for your narrative endeavors? Who in the broader narrative ecosystem is best positioned to help you achieve those long-term outcome(s)? Are you investing in the right set of players and strategies to achieve that version of success?
- Are your grantees ready and willing to align around a shared narrative framework? If not, what ideological and/or geographical contexts stand in the way of that alignment? What role do you see your institution playing in surfacing opportunities for more trust, visibility, collaboration, and alignment?
- How are you assessing your grantees' narrative skill and capacity? How will you navigate differentiated capacity across a set of grantees to increase baseline staffing, skill, and resources to do ongoing narrative and communications work?
- What monitoring, evaluation, and learning framework is in place to measure the impact of your initial investments? To what extent have your grantees informed these success indicators? How will you and your grantees know if these investments are working in the right direction?
- Beyond the grantees in your portfolio, who else needs to be engaged in your work in order for your desired narratives to take hold? How are your grantees thinking about and engaging with these potential narrative allies?
- How are you collaborating and engaging with other funders to better align and scale your narrative investments?



Additional Reading

The body of narrative research and resources continues to evolve and is now quite robust. New partners in this work can now leverage the experiences and expertise of leaders in the space to help determine where and how to best add value. Here is a curated list of some of our recommended reads and resources for the narrative curious.

HELPFUL DEFINITIONS

[Reference: Terms and Definitions in the Narrative Change Field](#) (Norman Lear Center)

[Narrative Change: A Working Definition \(and Some Related Terms\)](#) Narrative Initiative (2019)

CZI'S NARRATIVE RESEARCH AND RESOURCES

["Tracking California Housing Attitudes Over Time"](#) (September 2022)

["Narratives in California Media Regarding Housing Insecurity"](#) (2022)

[California Dream Toolkit Website](#)

[California Dream White Paper](#)

REPORTS AND RESOURCES FOR FUNDERS

Funding Narrative Change, An Assessment and Framework (the [Convergence Partnership](#))

[Narrative Change and Impact: Analysis of In-Depth Interviews with Experts, Practitioners, and Funders in the Narrative Change Field](#) (April 2023, USC Norman Lear Center, Media Impact Project)

[Building Narrative Infrastructure in Minnesota](#) (Narrative Initiative, 2019)

[At the Intersection of Power and Hope: Narrative Change in Minnesota](#) (Grassroots Policy Project 2019)

[Creating an Ecosystem for Narrative Power](#) (ReFrame, 2019)

[Spotlight On Impact Storytelling Mapping and recommendations for the narrative and cultural strategies ecosystem](#) (Erin Potts, Dom Lowell, and Liz Manne, 2022)

["Conditions to Flourish: Understanding the Ecosystem for Narrative Power"](#) (Global Narrative Hive, 2023)

OVERVIEW OF NARRATIVE BASICS

[Narrative Strategy: The Basics](#) (Liz Manne, Kirk Cheyfitz, Milan de Vries, Dom Lowell, Eli Pariser, Erin Potts, Erica Williams Simon)

[Changing Our Narrative About Narrative: The Infrastructure Required for Building Narrative Power](#), Rashad Robinson (2018)

[Toward New Gravity: Charting a Course for the Narrative Initiative](#) (Narrative Initiative)

MEASURING NARRATIVE WORK

[Measuring Narrative Change: Understanding Progress and Navigating Complexity](#) (ORS Impact, 2021)

[Measuring the Impacts of Poverty Narrative Change: A Practitioner Guide to Survey Questions](#) (Jennifer Green and Milan de Vries, 2021)

[Measuring Narrative Change: Moving From Theory to Practice](#) (SSRI; Brett Davidson, 2023)

