Center for Public Research and Leadership

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Parent Organizing Evaluation Framework and Implementation Manual

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**To download the complete Evaluation Framework Implementation Manual and related materials, go to:**

1. Introduction – Evaluation Framework and Implementation Manual, July 2020: <https://bit.ly/31F7n7G>
2. Organizing Evaluation Framework and Implementation Manual, July 2020: <https://bit.ly/3e0AZyU>
3. Organizing Examples Relative to Rubric, July 2020: <https://bit.ly/3iia0Sy>

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# Introduction to the Framework and Implementation Manual

**Background:**

All children should have access to a great public school education. In Connecticut, that is not currently the case. The divide between high-income families and low-income families is reflected in a gap in the quality of education their children receive. Children from low-income families and children of color are more likely to be trapped in underperforming schools than children from high-income families and White children.

How would schools change if parents in every community acted collectively to advocate for their children? What if parents had the knowledge and tools to organize so they could raise their voices in local and national debates about education? ZOOM is supporting community organizing to provide platforms for parent leaders whose children are directly affected by underperforming schools.

Community organizing has improved the lives of individuals and communities throughout our country’s history, notably during struggles for civil rights. Organizers listen to the needs of a community and encourage grassroots leaders to develop and flourish. Through this process of organizing, communities and individuals come into their power and raise their voices for change.

*“The unique role of organizing is to enable people who need or want the change to be authors of the change, because that addresses the causes of the problem (powerlessness in one form or another), not only the proble**m.”[[1]](#footnote-1)*

## Purpose of Manual

This Manual introduces the Parent Organizing Evaluation Framework (the “Framework”), which was developed to determine the degree to which organizing initiatives are building the parent power necessary to achieve educational equity. The Manual and related material were created to assist The ZOOM Foundation to evaluate organizing initiatives. The Manual is designed to help the user:

* identify components of organizing that are associated with high-performing organizing initiatives;
* learn from experience with the Framework itself and, to the extent this is shared, in partnership with other organizations, grantees, and the field at large; and
* utilize a suggested process for evaluating organizing, with flexibility to revise in the light of experience. Both the Framework and Manual are intended to be “living tools” that continue to evolve in response to insights developed over time.

As you use the Framework and Manual, please share feedback from your experience with ZOOM. For more information, please contact:



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## Overview of Manual

* **Part I** describes the Framework, including each of the individual indicators used in evaluating the performance of organizing initiatives. This part also explains the system of weights applied to the different indicators.
* **Part II** sets out the process for evaluating the performance of organizing initiatives against the indicators in the Framework, through a comprehensive review and a systematic rating process.
* **Part III** outlines the design and uses of the Framework Dashboard, a computer excel file, which presents a summary view of the performance of multiple organizing initiatives across each of the Framework indicators.
* **Part IV** lays out a process for evaluating the Framework itself, including gathering feedback and reflections from Reviewers and Participating Organizations on the Framework evaluation process and on steps organizations can take to assess and improve the Framework’s reliability and validity.
* Lastly, **Part V** describes how organizers might use their own results from the Framework to inform a problem-solving process designed to improve the success of their organizing work.

The **Appendices** compile numerous resources for use in the evaluation of organizing initiatives, including a list of data and documents to review (Appendices A, B, C); protocols for interviews and focus groups (Appendices D, E) and Evaluation feedback (Appendix I); forms for Reviewer observation (Appendix F), rating (Appendix G), and feedback (Appendix H);

## Definitions of Terms

The following list provides definitions of terms used throughout the Manual.

* **Implementation Team**: Staff from a foundation or non-profit organization who initiates and manages the evaluation process from start to finish
* **Organizer**: A professional who supports parents in their individual leadership development and collective action
* **Parent:** Adults responsible for students, including grandparents, foster parents and others
* **Parent Leader:** A parent actively engaged in organizing
* **Participant:** A representative from a Participating Organization
* **Participating Organization:** A non-profit organization that is effecting an organizing initiative and agrees to participate in the Evaluation process
* **Review Team**: A team, consisting of two or more seasoned organizers, that observes, evaluates and scores an organizing initiative according to the Framework and on behalf of the foundation or nonprofit conducting the Evaluation
* **Reviewer**: An individual member of the Review Team

# I. Description of the Parent Organizing Evaluation Framework

## Design of Framework

Columbia University’s [Center for Public Research and Leadership](http://web.law.columbia.edu/public-research-leadership) (CPRL) spearheaded the co-design of a framework for assessing organizing effectiveness.

The Framework incorporates promising practices in the field of community organizing. Resources used in drafting the Framework include:

1. Literature on education organizing as well as literature on community organizing and civic engagement more broadly, including:
   1. Report and book-length analyses of single and multiple organizing case studies (e.g., Mediratta, Shah, & McAlister, 2009),
   2. Theoretical frameworks linking organizing activities to organizing outcomes (e.g., Gold, Simon & Peralta, 2013),
   3. Academic research evaluating the effect of community organizing initiatives (e.g., Rhangelli, 2009), and
   4. Tools developed to help other foundations assess their own and their grantees’ community organizing work (e.g., Blueprint Research & Design, 2005);
2. Interviews with multiple experts in the field of community organizing;
3. The ZOOM Foundation’s 2015-2017 Prize for Parent Organizing materials;
4. Theories of action developed by The ZOOM Foundation’s 2015-2017 Prize for Parent Organizing Organizers; and
5. Suggestions on an earlier draft of the Framework by The ZOOM Foundation 2015-2017 Prize for Parent Organizing Organizers and The ZOOM Foundation staff.

A full list of resources consulted is included in the Bibliography.

## Overview of Framework

The Framework (pictured in Figure 1 below) focuses on three components of organizing designed to maximize the power of parents to achieve educational equity in Connecticut and beyond:

* *Organizing Infrastructure***:** The inputsor foundational supports and systems that function as precursors and catalysts for implementing effective practices that directly impact organizing outcomes.
* *Organizing Skill***:** The specific activities, processes, or intentional steps that organizing initiatives take to achieve their desired outcomes.
* *Organizing Impact***:** The outcomes of the initiative, i.e. changes in parent knowledge, skills, attitudes, and behavior as well as shifts in policy, practice, and student outcomes that result from collective action.

Figure 1. Parent Organizing Evaluation Framework.

As the arrows in the diagram indicate, each step in this Framework is *logically connected* to the others. The Organizing Infrastructureincludes all of the logically necessary resources for exercising the Organizing Skills**;** the Organizing Skills—by themselvesand without other unstated activities—can reasonably be expected to produce the desired Organizing Impact**.** Because the level of performance at each of the preliminary steps serves as a *leading indicator* of performance at the next steps, the Framework can be used to diagnose the root cause of setbacks or failures in achieving the desired Impact. For example, if an organizing initiative is not seeing the Impact it desires, its parent leaders and organizers may look to see if there are gaps in Organizing Skill that explain the problem, which then may generate an inquiry into gaps in Organizing Infrastructure that may account for the Skill gaps. By filling those gaps, an organizing initiative can expect to improve their Organizing Impact.

Over time, the Framework can also help organizations identify particular elements of Organizing Infrastructure and Organizing Skill that tend to be present when organizing initiatives achieve substantial Organizing Impact. That information, in turn, might lead organizations to increase the weights given to those elements in the Framework and to inform organizing initiatives about the importance of those steps.

These iterative uses of the Framework enable parent leaders and organizers to constantly work back from what happened to develop a hypothesis about why and to revise their work accordingly. As such, the Framework acknowledges that the path to educational equity is not “simple and linear” and instead typically requires a “circuitous” path to change “interspersed with inspiring gains and frustrating setbacks as groups search for ways to transform schools into the enriching environments their communities deserve.”[[2]](#endnote-1)

## Components of Framework in Detail

The three categories of indicators, in increasing order of importance, measure:

* *Organizing Infrastructure*—whether the organizing initiative has the culture and resources necessary, and thereby supports leaders and staff, to maximize parent power;
* *Organizing Skill*—whether the organizing initiative effectively implements established disciplines of organizing to build parent power; and
* *Organizing Impact*—whether the organizing initiative results in parent leaders’ collective power; harnessing that power to improve educational equity in Connecticut and beyond.

Within each of these categories is a set of indicators and sub-indicators, detailed below.

|  |
| --- |
| **1. ORGANIZING INFRASTRUCTURE.** The organizing initiative has the culture and resources necessary to build parent power for educational equity.[[3]](#endnote-2) |

**1.1 COMMITMENT TO BUILDING PARENT POWER**. The organizing initiatives’ mission, culture, and priorities clearly demonstrate a strong commitment to developing the capacity of low-income public school parents and communities in Connecticut to collectively demand, and to achieve, educational equity.[[4]](#endnote-3) Parent power in this context is defined as the organization and is members’ collective ability to achieve a desired outcome.

**1.2 COMMUNITY AND EDUCATION EQUITY UNDERSTANDING**.

**1.2.A** **COMMUNITY UNDERSTANDING**. The organizing initiative’s staff and leaders understand and are deeply attentive to the **community** context in which the initiative operates, including parents’ lived experiences, available resources, political dynamics.

**1.2.B** **EDUCATIONAL EQUITY UNDERSTANDING**. The organizing initiative’s staff and leaders understand the complex issues affecting the quality of schools and students’ academic results and the broader educational equity public policy and political context.[[5]](#endnote-4)

**1.3 ORGANIZING MODEL.** The organizing initiative has developed a robust parent organizing strategy and has practices to evaluate its effectiveness and make improvements.**[[6]](#endnote-5)**

**1.3.A THEORY OF CHANGE.** The organizing initiative has a clear theory of change for increasing parent leadership and collective power to enhance educational equity.

**1.3.B MEASURABLE OUTCOMES.** The organizing initiative uses measurable outcomes and goals to evaluate the change theory’s validity and implementation rigor.

**1.3.C REFLECTIVE PRACTICE.** The organizing initiative rapidly and effectively adapts its strategy based on evidence of success or failure.

**1.4 FINANCIAL STABILITY.** The organizing initiative has diversified, multi-year funding and effective strategies and mechanisms for future funding development.[[7]](#endnote-6)

**1.4.A DIVERSE FUNDING STRATEGIES.** The organizing initiative does not over-rely on one funding stream or strategy.

**1.4.B** **MULTI-YEAR FUNDING.** The organizing initiative has reoccurring unrestricted yearly funding streams.

**1.4.C MECHANISMS FOR FUTURE FUNDING DEVELOPMENT.** The organization initiative is poised for future sustainability.

**1.5 ORGANIZING STAFF CAPACITY.** The organizing initiative includes lead organizers with experience and expertise in maximizing the exercise of collective power by parent leaders.[[8]](#endnote-7)

|  |
| --- |
| **2. ORGANIZING SKILL.** The organizing initiative implements effective disciplines of organizing for expanding parent power. |

**2.1 LEADERSHIP DEVELOPMENT.** The organizing initiative supports comprehensive efforts to broaden the base of effective parent leaders to achieve educational equity in Connecticut and beyond.**[[9]](#endnote-8)**

**2.1.A PARENT LEADER BASE-BUILDING.** The organizing initiative takes systematic steps to expand its cohort of committed parent leaders, placing high value on utilizing 1:1 conversations, house meetings and listening sessions to build strong relationships with and identify new leaders and move them into action among public-school parents in Connecticut and/or beyond.**[[10]](#endnote-9)**

**2.1.B PARENT LEADER CAPACITY-BUILDING.** The organizing initiative takes systematic steps to support parents in a) increasing their knowledge about schools and school systems and their skills in navigating civic life, b) placing a high value on having each parent take a progressively greater role in leading the organizing work.**[[11]](#endnote-10)**

**2.2 STRATEGY DEVELOPMENT AND IMPLEMENTATION.** Parent leaders, with the support of staff, collectively gather information about, and develop and execute strategic campaigns to address gaps in educational equity.[[12]](#endnote-11)

**2.2.A RESEARCH AND ISSUE DEFINITION**. Parent leaders, with the support of staff, elicit other parents’ concerns about the public education context and conduct collective research and political analysis in order to identify gaps and potential solutions to improve outcomes for children.[[13]](#endnote-12)

**2.2.B STRATEGIC CAMPAIGN DEVELOPMENT.** Parent leaders, with the support of staff, collectively develop clearly defined, well-resourced strategic campaigns for expanding educational equity that use appropriate tactics including inside negotiation, collaboration, and/or public pressure.[[14]](#endnote-13)

**2.2.C CAMPAIGN EXECUTION.** Parent leaders, with the support of staff, thoroughly and effectively implement campaign plans for achieving educational equity.[[15]](#endnote-14)

**2.3 EXTERNAL RELATIONSHIP-BUILDING.** Parent leaders and staff collaborate with a range of institutions, organizations, and stakeholders to envision and implement educational changes at the school, district, and/or state level and bring a diverse group of stakeholders into negotiations that have the potential to lead to useful collaborative or ally relationships.[[16]](#endnote-15)

|  |
| --- |
| **3. ORGANIZING IMPACT.** The organizing initiative has resulted in parents’ collective power and that power has improved educational equity in Connecticut and/or beyond. |

**3.1 EXPANDED PARENT AND COMMUNITY POWER.** The organizing initiative has expanded its collective capacity and influence with regard to educational equity within its community.[[17]](#endnote-16)

**3.1.A CONSTITUENT GROWTH.** The organizing initiative has expanded its constituency for improving educational equity, including its base of parents, parent leaders, and partners.[[18]](#endnote-17)

**3.1.B KNOWLEDGE OF SCHOOLS AND SCHOOL SYSTEMS.** Parents have developed a shared understanding of how to support children's academic success and how to address barriers to student learning within schools.[[19]](#endnote-18)

**3.1.C BELIEF AND COMMITMENT.** The parent base has developed a belief in their ability to collectively affect change[[20]](#endnote-19) and a belief that they are members of the organizing initiative with a mutual commitment to shared goals.[[21]](#endnote-20)

**3.1.D. CIVIC CAPACITY AND PARTICIPATION.** Parent participation in the public sphere has increased, particularly regarding their participation in leadership positions resulting from organizing efforts, and in their children’s schools and school districts and in school-related and other elections.[[22]](#endnote-21)

**3.1.E PERCEIVED INFLUENCE.** Parents in the organizing initiative are recognized as effective and expert change agents by education stakeholders, public officials, community-based organizations, clergy and their congregations, the media, and/or the public.[[23]](#endnote-22)

**3.1.F PARENTS AS CHANGE AGENTS** Parents in the organizing initiative have developed relationships with educators, education officials, and other influential actors that emphasize responsiveness to parents, transparency, and shared decision-making.[[24]](#endnote-23)

**3.2 IMPROVED EDUCATIONAL INSTITUTIONS.** The organizing initiative achieved a meaningful educational win—one that did or will significantly change the educational landscape and improve educational equity in its own and other high-need communities.[[25]](#endnote-24)

**3.2.A ARTICULATION OF THE WIN.** Parents can articulate (i) an education win they *set out* to achieve as part of their organizing campaign, (ii) an education win or interim goals they *actually* achieved, as well as (iii) *how* they achieved the education win, including critical strategies used, obstacles or opposition faced and overcome, partnerships or alliances formed, and ways and reasons why strategies evolved over time.[[26]](#endnote-25)

**3.2.B EDUCATION LANDSCAPE CHANGES.** The education win did or will likely significantly change the education landscape. The change may affect leadership, governance, policy or practice[[27]](#footnote-2) at the community, school, district, or state level.[[28]](#endnote-26)

**3.2.C EDUCATIONAL EQUITY.** The significant change to the education landscape did or is likely to improve the equitable distribution of learning outcomes for children in high-need communities.[[29]](#endnote-27)

**3.2.D. SUSTAINABILITY.** There are strong, measurable and articulable reasons to predict that the significant change in the education landscape as well as improvements in the equitable distribution of educational opportunities and/or learning will be sustained, replicated, and/or augmented over at least the next five years.[[30]](#endnote-28)

## 

## Organizing Evaluation Framework Rubric

The Organizing Evaluation Framework Rubric (the “Rubric”, see Appendix J) guides Reviewers’ determination during the evidence-gathering process of how well an organizing initiative has performed on each of the indicators and sub-indicators. Reviewers also can use the Rubric to structure feedback to organizers and their organizations. In addition to describing indicators, the Rubric explains what an organizing initiative is expected to look like or have in place if it is at different levels on the continuum for each indicator running from Underdeveloped (Level 1) to Well Developed (Level 4). Table 1 provides an example of the four levels of performance on Indicator 3.1.B, which evaluates Knowledge about Schools and Systems.

Table 1. Rubric row for Indicator 3.1.B. Knowledge about Schools and School Systems

|  |  |  |  |
| --- | --- | --- | --- |
| **Underdeveloped (Level 1)** | **Developing**  **(Level 2)** | **Proficient**  **(Level 3)** | **Well Developed**  **(Level 4)** |
| Parents **have no understanding** of how to support children's academic success and how to address barriers to student learning within schools | Parents **have a limited understanding** of how to support children's academic success and how to address barriers to student learning within schools | Parents **have some significant understanding** of how to support children's academic success and how to address barriers to student learning within schools | Parents have a **deep, shared understanding** of how to support children's academic success and how to address barriers to student learning within schools |

## 

## Category, Indicator, and Sub-Indicator Weights

Table 2 provides a proposed set of weights for each category, indicator and sub-indicator in the Framework. The weighting scheme is based on available relevant research on education organizing, community organizing, and civic engagement.

*Category Weights*

The weighting scheme in Table 2 places the heaviest emphasis on Organizing Impact (50%). Organizing Infrastructure (10%) and Organizing Skill (40%) are crucial determinants of success in achieving Organizing Impact and in forecasting the likely capacity of initiatives to sustain and increase their impact in the near future.

*Indicator Weight Distribution within Organizing Infrastructure*

Each of the indicators within Organizing Infrastructure is weighted the same (2%), because the research identifying the relevant factors does not clearly prioritize among them as determinants of parent power and organizing success. Instead, the research suggests that the combination of a strong commitment to building parent power, an appreciation and deep understanding of the community context, a structured and reflective organizing model, expert organizing staff, and sufficient financial resources predicts that an organizing initiative is likely to execute organizing practices effectively.

*Indicator Weight Distribution within Organizing Skill*

Within Organizing Skill, Leadership Development receives the most weight (25%). Because in education-focused organizing, parents, not staff, drive organizing success – an initiative’s ability to build relationships with parents and develop them as powerful change agents in the community determines whether the initiative can realize change in educational opportunities for children from low-income communities.[[31]](#endnote-29) Typical of the research in this area is the following finding of the Community Organizing and School Reform Project, which catalogues patterns of best practices across successful education organizing efforts: “in order to build … power in the context of inequality,” organizing efforts must “place a high priority on building knowledge among parents.” As parents “build knowledge and connections, they develop the capacity to reorient power relationships and become powerful actors” transforming their educational institutions and communities.[[32]](#endnote-30)

The indicator for Strategy Development and Implementation also receives considerable weight (10%) within the Organizing Skill category. Although Strategy Development and Implementation indicator overlaps Leadership Development, given that effective leaders are more likely to develop and implement effective strategies, multiple organizing frameworks conclude that Strategy Development and Implementation is an important predictor of Organizing Impact apart from the effectiveness of leadership. For example, based on an extensive review of the research on community organizing, the Alliance for Justice found that “planning and management capacity” can “distinguish a group with the ability to have one successful campaign from a group that has the ability to make a more lasting impact.”[[33]](#endnote-31)

External Relationship-Building receives the remaining weight within Organizing Skill (5%). There is a strong consensus in the research that forming partnerships and alliances helps build an organizing initiative’s influence and capacity, but doing so cannot substitute for well-developed leaders and well-developed and effectively implemented strategy.

*Indicator Weight Distribution within Organizing Impact*

More weight within Organizing Impact is placed on Improving Educational Institutions (30%) than on Enhancing Parent and Community Power (20%). Although Enhancing Parent and Community Power is critically important to achieving transformational change in families’ equitable access to high-quality schools,[[34]](#endnote-32) if the former occurs without the latter, the objective of the organizing initiative has not been attained. So, while it is crucial to develop communities as strong and effective participants in civic life, it may be beneficial to have more weight fall on whether there are tangible improvements in the functioning and quality of schools and in students’ learning.[[35]](#endnote-33)

*Sub-Indicator Weights*

Each sub-indicator (listed *in italics* in Table 2*)* associated with a particular indicator is given equal weight, because the research does not clearly prioritize among them as determinants or illustrations of parent power and organizing success. For example, each sub-indicator of Organizing Model – Theory of Change, Measureable Outcomes, and Reflective Practice – is given equal weight of 0.7%. The aggregate of the weights of these sub-indicators serves as the weight for the indicator (2%).

Although the weights described above have a strong basis in research, an organization’s experience with them and other considerations may dictate changes, which can be made at any time by altering settings in the Dashboard, explained later in the Manual (see Part III. Design and Uses of the Framework Dashboard).

Table 2. Framework Weighting Scheme

|  |  |  |
| --- | --- | --- |
| **INDICATORS** | **OVERALL WEIGHT** | **WEIGHT WITHIN CATEGORY** |
| **ORGANIZING INFRASTRUCTURE** | | |
| **Commitment to Building Parent Power** | **2%** | **20%** |
| **Community Understanding** | **2%** | **20%** |
| **Organizing Model** | **2%** | **20%** |
| *Theory of Change* | *0.7%* | *6.7%* |
| *Measurable Outcomes* | *0.7%* | *6.7%* |
| *Reflective Practice* | *0.7%* | *6.7%* |
| **Financial Stability** | **2%** | **20%** |
| **Organizing Staff Capacity** | **2%** | **20%** |
| **CATEGORY TOTAL** | **10%** | **100%** |
| **ORGANIZING SKILL** | | |
| **Leadership Development** | **25%** | **63%** |
| *Parent Leader Base-Building* | *12.5%* | *31%* |
| *Parent Leader Capacity-Building* | *12.5%* | *31%* |
| **Strategy Development and Implementation** | **10%** | **25%** |
| *Research and Issue Definition* | *3.3%* | *8.3%* |
| *Strategic Campaign Development* | *3.3%* | *8.3%* |
| *Campaign Execution* | *3.3%* | *8.3%* |
| **External Relationship-building** | **5%** | **12.5%** |
| **CATEGORY TOTAL** | **40%** | **100%** |
| **ORGANIZING IMPACT** | | |
| **Expanded Parent and Community Power** | **20%** | **40%** |
| *Constituent Growth* | *3.3%* | *6.7%* |
| *Knowledge about Schools and Systems* | *3.3%* | *6.7%* |
| *Civic Capacity* | *3.3%* | *6.7%* |
| *Civic Participation* | *3.3%* | *6.7%* |
| *Perceived Influence* | *3.3%* | *6.7%* |
| *Mutual Accountability* | *3.3%* | *6.7%* |
| **Improved Educational Institutions** | **30%** | **60%** |
| *Articulation of the Win* | *7.5%* | *15%* |
| *Education Landscape Changes* | *7.5%* | *15%* |
| *Educational Equity* | *7.5%* | *15%* |
| *Sustainability* | *7.5%* | *15%* |
| **CATEGORY TOTAL** | **50%** | **100%** |

# II. Suggested Process for Evaluating Organizing Initiatives Using the Framework

This process for evaluating organizing initiatives against the indicators in the Framework can be used as outlined below or can be adjusted according to the values, interests and goals of the Implementation Team.

The Review Team conducts a comprehensive evaluation of each Participating Organization, applying all of the Rubric indicators to information learned from three sources: (1) a document and data review; (2) a site visit during which Reviewers conduct structured conversations with parents and staff; and (3) interviews with third parties who observed or were affected or influenced by the exercise of parent power. Table 3 provides a detailed description of each source of data for evaluating an organizing initiative’s performance on the indicators.

Each Reviewer on the Review Team rates each Participating Organization based on the strength and consistency of evidence from all data sources relating to each category of indicators. The Reviewers submit their ratings to the Implementation Team, which then inputs this data into the Framework Dashboard (described in Part III. Design and Uses of the Framework Dashboard). See the Reviewer Procedure section below for more detail.

## Using the Framework as an Application Tool

The Framework can also be used by a foundation in its initial application process (e.g., to narrow a large group of organizing initiatives down to a small subset of Participating Organizations), such as when a foundation is inviting organizing initiatives to apply for grantee support. Organizing initiatives can submit narrative text and accompanying materials (similar to the data and documents outlined in Table 3) about their Organizing Infrastructure and Skill and the demonstrable Impact of parent power exercised to date. See Appendix A for indicators that the Implementation Team can use at the application stage.

Table 3. Description of Data Sources

|  |  |
| --- | --- |
| Document and Data Review | In advance of a site visit, organizations submit additional documentation via email, pathbrite.com, google docs or other, to inform Reviewers about their Organizing Infrastructure, Skill, and Impact. Some of these materials are required from all organizations (e.g., theory of action and strategic plan), while others are only recommended (e.g., organizing approach and case study/project descriptions). Appendix B suggests documentation that organizations might be required or invited to submit at this stage. Participating Organizations also may be required to submit additional quantitative or qualitative data, not previously provided, to document their Organizing Infrastructure, Skill, and Impact. Appendix C suggests data that might be requested from organizations at this stage. |
| Site Visit (structured conversations with parents and staff) | During a site visit, the Review Team, consisting of **two** Reviewers, conducts structured conversations with staff and parents to understand the parent power being exercised and developed, the organizing model, the trajectory of organizing activity, and the impact of organizing on parent leaders, schools, and the community. Reviewers engage in a minimum of:   * **one** 30-minute interview with the Executive Director * **one** 30-minute focus group with Lead Organizers * **two** one-hour, four- to six-person focus groups with parents at varying leadership levels * **two** 30-minute in-depth interviews with two additional parents that have a particularly comprehensive perspective on the organizing work   Both Reviewers are encouraged to participate together in the Executive Director and Lead Organizer interviews, while splitting up to conduct parent focus groups and in-depth interviews—supported in the latter cases by a note-taker or a recording device. Appendix D contains sample staff and parent interview and focus group questions. |
| Third-Party Interviews | The organization submits a list of references to the Review Team with at least **one** organizational partner or ally and at least **one** school, district, city, or state staff member or official, member of the media, or other observer. Reviewers interview these references to understand the strength of partnerships/alliances created (if applicable) and third-party perceptions of the impact of the parent power exercised. In evaluating the results of these interviews, Reviewers keep in mind that the exercise of parent power and the results it achieves often, and appropriately, generates conflict, controversy, and emotions. Appendix E contains sample third-party interview questions. |

## Reviewer Procedure

In advance of their participation in the evaluation, each Reviewer should receive an Observation Form (see Appendix F). This form helps guide Reviewers in recording only low-inference observations relevant to each Framework indicator. Appendix F provides a brief explanation of low-inference observation and its value as a way to maximize the range of facts that are collected before analysis begins. Reviewers can use the form at three points in time: (1) before the site visit, when the Reviewer reads the organization’s documentation and data; (2) during or immediately following the site visit; and (3) during or immediately after third party interviews. The Observation Form is a tool to support Reviewers, not a document that Reviewers must comprehensively fill out.

Reviewers should then review their notes and rate the Participating Organization on each indicator as either underdeveloped (UD), developing (D), proficient (P), or well developed (WD), using the Rating Form (see Appendix G). Reviewers should pay particular attention to the text of the Rubric and ask themselves whether their conclusions are grounded in actual, factual observations. If an indicator has sub-indicators (e.g., Organizing Model), the Reviewer should only submit a rating for the sub-indicators. (Put differently, the aggregate of the ratings on the sub-indicators serves as the rating on the indicator.)

Reviewers should keep in mind that their evaluation serves two important purposes: (1) assessing how effectively each organization has built the parent power necessary to achieve educational equity; and (2) an opportunity to support organizing initiatives in reflecting on and improving their work. To these ends, the Reviewer may want to complete the Feedback Form (see Appendix H) noting areas of strength, areas for growth, and suggestions for next steps for improving the organizing initiative. Reviewers are encouraged to submit all of their documents—their Observation Form, Rating Form, and Feedback Form—to the Implementation Team within one week of completing the document and data reviews, site visit, and third-party interviews.

# III. Design and Uses of the Framework Dashboard

The Framework Dashboard (“Dashboard”) provides the Implementation Team with a summary of organizing initiatives’ performance on each indicator, organized by the Framework’s three categories of indicators (Organizing Infrastructure, Organizing Skill, and Organizing Impact).

Link to Dashboard: [Evaluation Framework Dashboard Tool](https://www.dropbox.com/s/dz8ojzo803901ku/Framework%20Dashboard%20Tool.xlsx?dl=0)

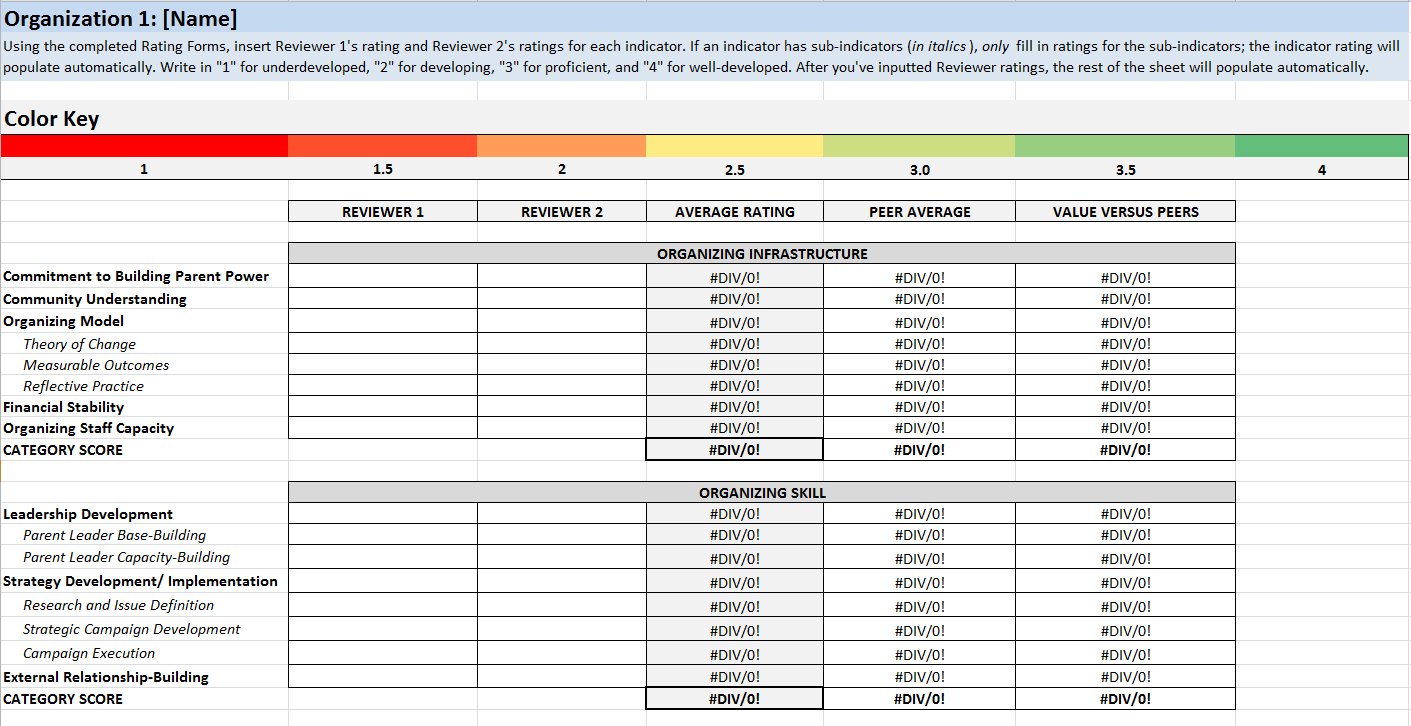
## Guide to the Dashboard

The Dashboard is an Excel workbook with multiple worksheets that contribute to measuring the performance of organizing initiatives. Below is a description of each of the worksheets.

* **‘Weights’** worksheetlists the weights accorded in the Dashboard to each category (Organizing Infrastructure, Organizing Skill, Organizing Impact), indicator, and sub-indicator (*in italics)*. By changing the weight settings on this worksheet, a user can alter weights throughout the Dashboard. Generally, this worksheet should not be altered.
* **‘Summary Dashboard’** worksheet compares results across Participating Organizations for each category, indicator, and sub-indicator*.* All versions of the **‘Summary Dashboard’** are organized as a heat map on which the color of a cell (green, yellow, or red) indicates an organizing initiatives’ performance level (with bright red indicating underdeveloped and dark green indicating well developed). Generally, this worksheet should not be altered.
* **‘Org Level’** worksheets provide overviews of *individual* ParticipatingOrganization’s performance on each category, indicator, and sub-indicator.
  + A screenshot of an individual **‘Org-Level’** worksheet is provided in Figure 2 below. Moving through the columns from left to right, the sheet shows the indicators, the Reviewer ratings for the individual Participating Organization, the Average Rating[[36]](#footnote-3) across Reviewers for the individual Participating Organization, the Peer Average (i.e., the average across *all* Participating Organizations), and the Value versus Peers (i.e. how the individual Participating Organization’s performance compares to the other Participating Organizations, if applicable). The Average Rating for the Participating Organization is displayed as a heat map with the same gradations as the ‘**Summary Dashboard’** above. Generally, the Implementation Team inputs the Reviewer ratings for the individual Participating Organization. The remaining cells are generally not altered.
* **‘IRR’,** or the inter-rater reliability sheet, indicates whether there was agreement between multiple Reviewer ratings for each organization on each indicator. A "0" means there was a lack of agreement between Reviewers, and a "1" means there was agreement. The **‘IRR’** sheet uses a simple consensus measure to display the overall level of agreement between Reviewer ratings. If inter-rater reliability is low, it might signal a need for more Reviewer norming[[37]](#footnote-4)on indicators or a change in Rubric language.

Completing each individual **‘Org-Level’** sheetwill populate the **‘Summary Dashboard’** and ‘**IRR**.’

Figure 2. Individual **‘Org-Level’** sheet



## Populating the Dashboard

The Implementation Team should take the following steps to populate the dashboard:

1. **Select the first ‘Org-Level’ worksheet.**
2. **Using the completed Rating Forms, insert Reviewer 1’s rating and Reviewer 2’s rating for the Participating Organization.** Insert a “1” for underdeveloped, “2” for developing, “3” for proficient, and “4” for well developed. For indicators with sub-indicators (*in italics)*, fill in ratings *only* for the sub-indicators; the indicator rating will populate automatically based on the weighted average of the sub-indicators. Once indicator ratings are populated, category ratings will populate automatically based on the weighted average of the indicator ratings, and then final ratings will populate automatically based on the weighted average of category ratings.
3. **Repeat for all remaining ‘Org-Level’ worksheets.**

When all Reviewer ratings are inputted, the **‘Summary Dashboard’** and **‘IRR’** sheets will automatically populate, along with the Peer Average and the Value Versus Peers sections of the **‘Org-Level’** sheets.

Notably, the only cells that the team can populate on the Dashboard are the cells in the Reviewer 1 and Reviewer 2 columns on the individual **‘Org-Level’** sheets and the cells in the Overall Weight column on the **‘Weights’** sheet. All other cells are locked. If the Review team would like to edit the locked cells, they can select Review on the Excel toolbar and then Unprotect Sheet. Editing these cells will remove pre-populated formulas.

## Uses of the Dashboard

The Implementation Team can use the Dashboard to serve multiple purposes:

* *Support Organizer capacity-building and development.*Using the overview provided by the **‘Summary Dashboard’** or the individual **‘Org-Level’** sheets, the Implementation Team can quickly identify areas where Participating organizations are doing relatively well and areas where they are doing relatively poorly. In response, they can target support in the latter areas and encourage the Participating Organization to engage in a problem-solving process to drive improvement in these areas. For more information, see Part V. Framework-Driven Problem Solving by Organizations.
* *Help the organization evaluate its success in reaching its goals.*By looking at results over time, the Implementation Team can determine whether it is achieving its goal of building the capacity of organizing initiatives to cultivate local parent leaders and support a parent-led movement for educational equity and justice in Connecticut and/or beyond.
* *Assist in identifying promising practices.*The Dashboard can help identify the elements of Organizing Infrastructure and Organizing Skill that are most often correlated with high-performing organizing initiatives.
* *Allow the Implementation Team to test assumptions underlying the Framework, Rubric and Weights.*The **‘Summary Dashboard’** can provide visual clarity about whether the logic underlying the Framework is sound. For instance, if over time, there is no correlation between organizing initiatives receiving high scores on Organizing Infrastructure or Organizing Skill and those receiving high scores on Organizing Impact, the Implementation Team may conclude that Organizing Infrastructure and Skill as measured by the Framework are not a leading indicators of Organizing Impact, and that the Framework must be modified by giving less or no weight to the category which is not correlated with Impact. The same is true of individual indicators or sub-indicators in the Framework that are not correlated with Organizing Impact.
* *Assist in the improvement of the Framework evaluation process.*By examining inter-rater reliability on the **‘IRR’** sheet, the Implementation Team can identify particular Reviewers whose scores frequently fail to correspond to those of other Reviewers and might not be suitable for the position. The Review team can also use the ‘**IRR**’ sheet to pinpoint particular indicators or sub-indicators as to which scores tend to disagree, suggesting a need for more Reviewer norming[[38]](#footnote-5) on the indicator or more clarity in Rubric language. For more information on inter-rater reliability, see Part IV. Ongoing Evaluation and Improvement of the Framework.

# IV. Ongoing Evaluation and Improvement of the Framework

The Implementation Team can use the evaluation process to review and improve the Framework indicators, the Rubric, and the site visit.

## Review of the Evaluation Process

To evaluate the evaluation process, the Implementation Team may conduct structured conversations with Reviewers and Participating Organizations about their experience with the evaluation process. Appendix I contains questions for Reviewers, parent leaders, and other participants in organizing initiatives.

## Review of Reliability and Validity

In evaluating the evaluation processes, the Implementation Team may also choose to collect evidence on the following features of the Framework as designed: (1) inter-rater reliability, (2) convergent validity, and (3) predictive validity. Each of these constructs can help the Implementation Team both assess the quality of information provided by the Framework and refine the Framework and Reviewer training. Table 4 describes each of these concepts and the rationale for testing the Framework on each of these criteria.

Table 4. Research Questions and Rationale for Examining Reliability and Validity

|  |  |  |
| --- | --- | --- |
| Evidence sought | Research Question | Rationale |
| Inter-rater reliability | How consistent are Reviewers’ ratings of organizing initiatives? Would scores on the Framework remain consistent irrespective of the Reviewer? | To determine whether Reviewer training/ norming has created consensus in scoring on the Rubric |
| Convergent validity | Are organizing initiatives’ ratings on the Framework consistent with team perceptions of initiatives’ performance as well as initiatives’ initial application ratings? | To determine the degree to which two measures of the same construct (parent organizing performance) that theoretically should be related, are in fact related, tending to confirm the Framework’s usefulness. |
| Predictive validity | Does organizing initiative performance as evidenced by scores on each indicator of the Framework predict future success in community organizing? | To determine whether the Framework is a valuable leading indicator of prospective organizing initiative success |

The Implementation Team may wish to use the following strategies for collecting evidence on reliability and validity that take into account limitations of the evaluation process, including the small number of initiatives taking part, the limited number of Reviewers, and the short time period available for evaluation. Each of these methods tries to gather the best possible information to support Framework improvement.

1. *Inter-rater reliability.*TheImplementation Team may choose to examine inter-rater reliability in the following ways:

* Using the **‘IRR’** worksheet in the Dashboard, assess the consistency of ratings across Reviewers for each Participating Organization (i.e., examine the row labeled inter-rater reliability).
* Also, using the **‘IRR’** worksheet, look across the indicator and sub-indicator rows to determine whether there are specific indicators and sub-indicators that Reviewers consistently disagree on (i.e. look for rows where there are a lot of 0s).
* Using the **‘Org-Level’** worksheet, assess whether one Reviewer gave organizing initiatives consistently higher or lower ratings than another Reviewer.
* Ask Reviewers targeted questions about areas of consistency and inconsistency with other Reviewers in post-evaluation conversations.
* If possible, have a member of the Implementation Team shadow-review at least a portion of one or more of the pilot site visits, and assess the consistency of their “informal ratings” with Reviewer “formal ratings.”

These mechanisms will provide the Implementation Team with substantial evidence about larger inconsistencies that may exist, indicators as to which there are frequent inconsistency, and/ or the presence of an outlier Reviewer, so that steps can be taken to enhance Reviewer training and norming or address flaws in the Rubric itself.

1. *Convergent validity.*If the Framework truly measures the construct of parent organizing performance, then its results should correlate with other tools that measure the same thing. In order to determine convergent validity, the Implementation Team might record their intuitive predictions about the results of the evaluation based on their personal observations of organizing initiatives, in advance of reviewing the results presented on the Dashboard. Large discrepancies between these informal predictions and Framework outcomes across multiple team members and organizing initiatives could signal a need to revise the Framework.
2. *Predictive validity.*Framework ratings not only measure the current success of organizing initiatives but also their potential future success in increasing educational equity in their communities. Ideally, therefore, to check validity, the Implementation Team would measure the extent to which Framework ratings are correlated with organizing initiatives’ success in expanding educational equity at some point in the future. These sorts of comparisons are not possible in the short-term, but the Implementation Team might choose to follow organizing initiatives into the future.

# V. Framework-Driven Problem Solving by Organizers

The Framework evaluation process is designed to enable the Implementation Team to assess how effectively a Participating Organization is building the parent power needed to achieve educational equity in Connecticut and/ or beyond. In addition, it is designed to provide Participants with the opportunity to reflect on their progress, solicit feedback and plan for improvement. Participants in the evaluation process are encouraged to use feedback they receive to generate a problem-solving cycle that involves (1) setting improvement priorities, (2) investigating the causes of performance trends, (3) formulating interventions, and (4) monitoring progress. The following is a description of this four-part process.

## Identify and Investigate Priorities for Improvement

*Identify Evidence-Based Improvement Priorities*

* Participating Organizations are encouraged to use the Dashboard and feedback to review and reflect on their performance in building parent power and increasing educational equity, to assess performance trends and gaps, and to engage parent leaders and staff in collaborative improvement efforts.

*Investigate Performance Trends*

* As part of the collaborative improvement efforts, Participants identify particular areas of the Framework in which performance lagged and engage in root-cause analysis to determine why. Questions to be considered at this stage might include:
  + What growth area(s) in terms of Organizing Impact did the Framework reveal?
  + What skills needed to be implemented effectively in order to achieve that type or degree of impact, and what does the Framework show about the organizing initiative’s strengths or growth areas?
  + If skills were not well executed, is it because key elements of Organizing Infrastructure were not in place, as also demonstrated by the Framework?

*Formulate Hypotheses*

* Participants use the information gathered to formulate hypotheses as to why the desired outcomes were not achieved.
* If the Framework’s performance indicators do not reveal enough information to formulate a strong hypothesis about the source of the performance gap, Participants may take steps such as the following:
  + Consult additional sources of data beyond the Framework, including Participants’ own internal data and documentation on implementation
  + Engage in low-inference observations[[39]](#footnote-6) of their organizing work to see where gaps exist. Participants are encouraged to engage in a structured debrief after these observations, in which they first carefully list the facts and events they observed without interpretation, and only thereafter begin to draw conclusions about cause and effect.
  + Involve neutral third parties in the observations and analysis to help spot growth areas that may be less apparent to day-to-day Participants.

## Design and Implement Targeted Interventions

*Design Interventions and Plans for Monitoring Success of Interventions*

* Based on their hypotheses, Participants develop interventions or solutions to address each improvement priority.
* Participants then define what the intervention’s or solution’s success would look like and what qualitative or quantitative measures they will use to determine whether they have achieved that degree of success.

*Implement Interventions*

* Participants implement interventions to address gap areas in organizing.

## Monitor and Adjust Implemented Practices

*Monitor Progress, Adjust Interventions, and Formulate New Hypotheses*

* Using the measures they have previously identified, Participants track improvement and test their hypotheses about the causes of and solutions for growth areas in Organizing Infrastructure, Skill, and Impact.
* If improvement is not detected, participants can return to the Framework or conduct additional analyses or observations to identify other areas of Organizing Skill or Infrastructure that might be impeding progress and conduct another problem-solving cycle.

# VI. Appendices

## Appendix A: Data Sources for Evaluating Parent Organizing Initiatives’ Performance on Indicators

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
|  |  |  | | | |
| **Application (If applicable)** | **Document and Data Review** | **Structured Conversations with Staff** | **Structured Conversations with Parents** | **Third Party Conversations** |
| Organizing Infrastructure | | | | | |
| Commitment to Building Parent Power | X |  | X | X |  |
| Community Understanding | X |  | X | X |  |
| Organizing Model | X | X | X | X |  |
| Financial Stability | X | X |  |  |  |
| Organizing Staff Capacity | X | X | X | X |  |
| Organizing Skill | | | | | |
| Leadership Development | X | X | X | X |  |
| Research and Issue Definition | X | X | X | X |  |
| Strategy Development and Implementation | X | X | X | X |  |
| External Relationship-building | X | X | X | X | X |
| Organizing Impact | | | | | |
| Expanded Parent and Community Power | | | | | |
| Constituent Growth | X | X | X |  |  |
| Knowledge of Schools and School Systems |  | X | X | X |  |
| Civic Capacity |  | X | X | X |  |
| Civic Participation | X |  | X | X |  |
| Perceived Influence | X | X |  |  | X |
| Parents as Power Agents | X | X | X | X | X |
| Improved Educational Institutions | | | | | |
| Articulation of the Win | X | X | X | X |  |
| Education Landscape Changes | X | X | X | X | X |
| Educational Equity | X | X | X | X | X |
| Sustainability | X |  | X | X | X |

## Appendix B: Documentation and Collection of Artifacts for Parent Organizing Initiatives

Below is a list of artifacts that a Participating Organization might be required or encouraged to gather. As indicated below, each artifact can help Reviewers evaluate the Participating Organization’s performance on Organizing Infrastructure, Organizing Skill, or Organizing Impact. Participating Organizations are encouraged to submit documentation via online tools, such as [www.pathbrite.com](http://www.pathbrite.com), email, Google Docs.

|  |  |  |
| --- | --- | --- |
| **DOCUMENT** | **DESCRIPTION OF DOCUMENT** | **REQUIRED/**  **RECOMMENDED** |
| **ORGANIZING INFRASTRUCTURE** | | |
| Theory of action | An “if-then” statement that outlines the strategies that will be used and the goals that will be achieved as part of the organizing initiative |  |
| Strategic Plan | Plan for building parent-power for educational equity, including related metrics and goals |  |
| Data and Goal Tracking | An Excel file that compiles data aligned to internal goals and metrics, including growth achieved over time |  |
| Organizing Approach | Statement of beliefs, philosophy or method |  |
| **ORGANIZING SKILL** | | |
| Organizing Cycle | Materials that demonstrate actual steps in the organizing cycle, including efforts to develop relationships with parents; build the leadership capacity of parents; engage in research; and develop and execute campaign strategy, (*e.g.,* description of your organization’s leadership ladder, power map, results from a community survey, campaign plan of action, research report, policy resolution or other statement of desired change) |  |
| Organizing Materials | Organizing training materials for staff or parent leaders, including training presentations, talking points, handouts or curriculum that demonstrate communication and leader/group development approach |  |
| Field Experience: Multi-media | Photos, videos, social media links that connect to organizing initiative’s work (e.g., a video of a meeting, event, or action); include a minimum of five photos and one video |  |

|  |  |  |
| --- | --- | --- |
| Field Experience: Flyers or Minutes | Records of meetings *(e.g., documentation of a meeting with a partner or education official; handouts or minutes from a community meeting)* |  |
|  | | |
| Field Experience: Case or project descriptions | Materials that offer a fuller picture of one specific, completed project from start to finish, or case study approach to describing experience and steps of full organizing cycle |  |
| Field Experience: “Win” documents | Documentation of a change in governance, policy or practice at the community, school, district or state level *(e.g., press release, media clipping, official policy)* |  |
| Letters of Recommendation or Reinforcement | Traditional letters of recommendation or an email or note of reinforcement for a job well done from external parties |  |
| Testimonials | Testimonials from an individual directly impacted by the organizing effort (e.g., parent leaders, targets of campaigns, allies) |  |

## Appendix C: Data that the Implementation Team may Request from Participating Organizations

Additional qualitative and quantitative data may help Reviewers evaluate the Participating Organization’s performance relative to the indicator noted in the left column. The list is based on a number of evaluation frameworks developed for education organizing or for community organizing more broadly.

|  |  |
| --- | --- |
| **INDICATOR** | **DATA** |
| **Organizing Infrastructure** | |
| Financial Stability | Operating budget[[40]](#endnote-34)  # and variety of funding streams[[41]](#endnote-35) |
| Organizing Staff Capacity | # of staff  Qualifications and diversity of staff |
| **Organizing Skill** | |
| Leadership Development | # of parent base-building activities, e.g., # of doors knocked on, 1:1 conversations, house meetings, phone calls, community conversations[[42]](#endnote-36)  # of parents reached through base-building activities  # of capacity-building activities, e.g., # of trainings, public events, planning meetings, task forces, actions, voter/civic activities.[[43]](#endnote-37)  Frequency of capacity-building activities[[44]](#endnote-38)  # of people who participated in leader capacity-building activities[[45]](#endnote-39)  Consistency of participation[[46]](#endnote-40)  Parent perception of the quality of capacity-building activities[[47]](#endnote-41)  # of total members or individuals in the base  # of leaders (e.g., at each tier on a leadership ladder)[[48]](#endnote-42)  Retention and turnover of core leaders[[49]](#endnote-43)  # of people educated about issues affecting them via modes such as newsletters, research publications, Web site, email blasts, other[[50]](#endnote-44)  # of parents leading meetings  # of research actions (i.e. parent-led accountability sessions) conducted & # of parent leaders attending |
| Strategy Development and Implementation | % of campaign(s) plans implemented |
| External Relationship-Building | # and diversity of partnering groups and allies[[51]](#endnote-45)  # of meetings with allies and potential allies[[52]](#endnote-46)  # of collaborative events, actions or campaigns planned with allies[[53]](#endnote-47)  # of parent leaders communicating with allies[[54]](#endnote-48) |

-continued-

|  |  |
| --- | --- |
| **Organizing Impact** | |
| Constituent Growth | % change in members or individuals in the base[[55]](#endnote-49)  % change in number of parent leaders  % change in partners and allies |
| Knowledge about Schools and School Systems | Parents’ report on their knowledge about schools and school systems[[56]](#endnote-50) |
| Civic Capacity | Parent report about their feelings of collective belonging, mutual commitment, and/or collective self-efficacy[[57]](#endnote-51) |
| Civic Participation | # of parents that have leadership positions in their children’s schools and school districts or in another political or civic sector entity as a result of collective action  # of parents who supported election education and/or election turnout  # of parents registered to vote[[58]](#endnote-52)  Parent turnout at elections[[59]](#endnote-53)  # of parent volunteers in their children’s schools and school districts |
| Perceived Influence | # of media mentions[[60]](#endnote-54)  # and prominence of decision-makers that cite the organizing initiative when talking about education[[61]](#endnote-55) |
| Mutual Accountability | # and % of invited decision-makers that show up at events[[62]](#endnote-56)  # and prominence of decision-makers who publicly support campaign asks[[63]](#endnote-57)  # of official invitations to participate in planning meetings[[64]](#endnote-58) |
| Educational Equity | Collective action wins  Student learning outcomes[[65]](#endnote-59) |

## Appendix D: Site Visit Protocols

Below are a set of protocols Reviewers may use when conducting structured conversations with staff and parents during a site visit. The sample questions are aligned with the categories in the Framework – Organizing Infrastructure, Organizing Skill, and Organizing Impact. They are not exhaustive and Reviewers and/or Implementation Team may wish to adapt or add to these questions based on the context of each organizing initiative. The Implementation Team may also consider integrating some of these questions into their initial application process, rather than including them in the site visit conversations.

**Protocol for Staff Conversations**

|  |  |
| --- | --- |
| Sample Introduction: | Thank you for taking the time to speak with us today. My name is [Reviewer name], and this is my colleague [other Reviewer name]. As you know, we are working to use this evaluation Framework to provide feedback on your organizing initiative. This is an opportunity for you to reflect on your progress, solicit feedback and use this experience in your planning.  Prior to this site visit, we’ve had the opportunity to review the documentation that you submitted. Over the next [timeframe], we want to dig a little deeper to understand your organizing model, the trajectory of your organizing activity in education, and the impact your organizing initiative has had. Our hope is that this feels like a conversation as opposed to an interview. We encourage you to speak as honestly as possible about your work. We encourage you to reflect on where and why you may have diverged from original plans.  Do you have any questions before we begin? |
| **Organizing Infrastructure** | |
| Reviewer: | First, we’d like to ask you a few general questions about your organizing initiative. What are the overarching goals of the initiative? [Follow up] What are the most important strategies that you use to achieve these goals? |
| Interviewee: |  |
| Reviewer: | How do you know if you are or are not successful in achieving your goals? |
| Interviewee: |  |
| Reviewer: | How would you describe the community that you are working with? [Follow up] How would you describe the quality of their schooling options? [Follow up] How would you describe the political climate around education in your community? |
| Interviewee: |  |

|  |  |
| --- | --- |
| **Organizing Skill** | |
| Reviewer: | Now, we’d like to ask you a couple of questions about your parent base. How do you build new relationships with parents in the community? [Probe] Does your initiative conduct 1:1 conversations, house meetings, etc.? |
| Interviewee: |  |
| Reviewer: | What strategies do you use to develop parents as leaders? [Probe] How do you support parents in taking ownership over organizing work? How do you support parents in learning about education and education systems? |
| Interviewee: |  |
| Reviewer: | Now let’s talk about your current education campaign or your most important completed campaign [adapt to initiative]. What problems or conditions is the campaign seeking to address or change? [Follow up] How widespread is/was this issue? |
| Interviewee: |  |
| Reviewer: | How did you learn that this was an issue in your community? |
| Interviewee: |  |
| Reviewer: | How did you gather more information about this issue and potential solutions? [Probe] Can you talk about research or data that you examined or any experts consulted? What did you learn? |
| Interviewee: |  |
| Reviewer: | Within your community, who has influence over this issue, and are/were there any significant political obstacles to addressing it? |
| Interviewee: |  |
| Reviewer: | Describe your initiative’s plan for addressing this issue. What are/were the most important tactics that the initiative is using/used? [Follow up] What were the ultimate goals of the campaign? |
| Interviewee: |  |
| Reviewer: | Who are/were your most important partners or allies in the campaign? In what ways do/did you and these partners work together? |
| Interviewee: |  |
| Reviewer: | What roles and responsibilities did parents have in implementing the campaign? |
| Interviewee: |  |
| Reviewer: | Did you have to shift or adapt your campaign strategy over time? Why? |
| Interviewee: |  |

|  |  |
| --- | --- |
| **Organizing Impact** | |
| Reviewer: | [If applicable] What have you achieved as a result of this campaign? [Follow up] How was does this compare to what you were hoping to achieve? [If applicable] Can you describe why there was a difference in what you achieved and hoped to achieve? |
| Interviewee: |  |
| Reviewer: | How will your achievement change policy or practice in [school, community, district]? [Follow up] How will your achievement affect student learning? |
| Interviewee: |  |
| Reviewer: | Do you believe that the changes you made will be sustainable over the long-term? Why or why not? [Probe] Is the change supported by educators and/or education officials responsible for implementing it? How do you know? |
| Interviewee: |  |
| Reviewer: | At this point, we’d like to shift gears and talk about how your work has influenced parents and the larger community. First, how have parents grown as leaders since participating in the initiative? [Probe] Do parents have more knowledge about schools and school systems? Do they have stronger organizing skills? Provide examples. |
| Interviewee: |  |
| Reviewer: | In your opinion, are parents committed to working together to achieve the goal of the initiative? How do you know? |
| Interviewee: |  |
| Reviewer: | Have parents in the initiative taken on new leadership roles within the community as a result of organizing efforts? What types of roles? [Probe for roles in schools and school districts and in school-related and other elections] |
| Interviewee: |  |
| Reviewer: | Has your initiative developed strong relationships with educators or education officials in the community? Describe these relationships. [Probes] Do educators and/or education officials engage you in decision-making? Are they transparent about decision-making and/or school data? Do they respond to your initiative’s demands? Have they promoted your initiative’s agenda? |
| Interviewee: |  |
| Reviewer: | Do you feel like others in the community see you as an important player in education? Why or why not? |
| Interviewee: |  |
| Reviewer: | Would you like to mention any additional impact that your initiative has had in the community that we did not discuss? |
| Interviewee: |  |

**Protocol for Parent Conversations**

|  |  |
| --- | --- |
| Sample Introduction: | Thank you for taking the time to speak with us today. My name is [Reviewer name], and this is my colleague [note-taker name]. We are working to learn more about parent organizing at [organizing initiative]. Over the next [timeframe], we want to discuss your experiences organizing in [community] and the impact your involvement with [organizing initiative] has had on you.  Our hope is that this feels like a conversation as opposed to an interview. Throughout this conversation, we encourage you to speak as honestly as possible about your work. We want to emphasize that anything that you share with us today will not be shared with the [organizing initiative] staff. We also want to emphasize that there are no right or wrong answers; we expect and welcome different points of view from each of you.  Do you have any questions before we begin?  [If initiating a parent focus group] Now, I would like for us to get know each other a little better. As we go around the room, please share your name, how long you’ve been involved with [organizing initiative], and the education level of your child or children. |
| **Organizing Skill** | |
| Reviewer: | We’d like to begin by hearing the story of your involvement with [organizing initiative]. How did you learn about [organizing initiative] and what motivated you to join? [Probe] Did you feel that [organizing initiative’s] work was aligned to your needs and your community’s needs? Why or why not? |
| Interviewee: |  |
| Reviewer: | Since getting involved with [organizing initiative], what activities have you participated in? [Follow up] How often do you participate in [organizing initiative] activities? |
| Interviewee: |  |
| Reviewer: | Have you taken on any leadership roles and responsibilities in [organizing initiative]? [Follow up] How were you prepared to play this role? What support, if any, did Lead Organizers provide you? |
| Interviewee: |  |
| Reviewer: | Can you talk a little about the most important issue(s) that [organizing initiative] is seeking to address. What is this issue? [Probe] How did the initiative identify [the issue] as an issue in the community? How many children or schools does [the issue] affect? What is the cause of [this issue]? What have you learned about possible solutions to [the issue]? Within your community, who has influence over this issue, and are there any significant political obstacles to addressing it? |
| Interviewee: |  |
| Reviewer: | Describe [organizing initiative’s] plan for addressing [the issue]. What are the most important strategies that [organizing initiative] is using/used? [Follow up] How were you involved in implementing this strategy? [Follow up] What partners were involved in this work? [Follow up] Did you have to shift or adapt your strategy over time? Why? |
| Interviewee: |  |
| **Organizing Impact** | |
| Reviewer: | How would you describe the impact that [organizing initiative] has had at the [school or district level], particularly related to [issue(s) described]? |
| Interviewee: |  |
| Reviewer: | Do you believe that the changes [organizing initiative] made will improve student learning? Why or why not? Do you believe that the changes [organizing initiative] made will be sustainable over the long-term? Why or why not? |
| Interviewee: |  |
| Reviewer: | Did the [organizing initiative] achieve everything it was hoping to achieve? Why or why not? What still needs to be done? |
| Interviewee: |  |
| Reviewer: | Now, let’s shift gears a bit. We just spoke about the impact [organizing initiative] has had on [school or district]. What impact has participating in the [organizing initiative] had on you? [Probe] What knowledge are you gaining? What skills are you building? Talk about the leadership that you are discovering in yourself. |
| Interviewee: |  |
| Reviewer: | How confident do you feel in your ability to take leadership in a future initiative? |
| Interviewee: |  |
| Reviewer: | Have you taken on new leadership roles within the community as a result of your organizing efforts? What types of roles? [Probe for roles in schools and school districts and in school-related and other elections] |
| Interviewee: |  |
| Reviewer: | Do you think you will continue to participate in the initiative? Why or why not? |
| Interviewee: |  |
| Reviewer: | For our final set of questions, we’d like to talk about the role of [organizing initiative] within the community. Do you feel like others in the community see [organizing initiative] as an important player in education? Why or why not? |
| Interviewee: |  |
| Reviewer: | Has [organizing initiative] developed strong relationships with educators and/or education officials in [community]? Describe these relationships. [Probes] Have you worked with educators and/or education officials to make important decisions? Do educators and/or education officials share information with you on a regular basis? Have they responded to your demands? Have they promoted your agenda? |
| Interviewee: |  |
| Reviewer: | In your opinion, are [organizing initiative’s] parents committed to working together to achieve the goal of the initiative? How do you know? |
| Interviewee: |  |
| Reviewer: | How confident do you feel that if [organizing initiative’s] parents work together they can improve education in the [community]? |
| Interviewee: |  |
| Reviewer: | Would you like to mention any additional impact that [organizing initiative] has had on you personally or on your community? |
| Interviewee: |  |

## Appendix E: Protocol for Third Party Interviews

Below is a protocol Reviewers may use when conducting third-party interviews. The suggested questions may help Reviewers assess organizing initiatives on the following indicators:

* External Relationship-Building
* Perceived Influence
* Mutual Accountability
* Education Landscape Changes
* Education Equity
* Sustainability

The questions are not exhaustive and Reviewers and/or organization staff may wish to adapt or add to the protocol based on the context of each organizing initiative.

|  |  |
| --- | --- |
| Sample  Introduction: | Thank you for taking the time to talk with us today. My name is [Reviewer name], and I am a Reviewer for a [Parent Organizing Initiative .]  I was wondering if I could ask you a few questions about your experiences working with [organizing initiative] and your understanding of their role in the community. I want to emphasize that anything shared within this interview will not be shared with [organizing initiative]. It will serve as one of multiple pieces of evidence.  Do you have any questions before we begin? |
| Reviewer: | First, can you describe the work of your [organization, government unit, school]? What is your specific role in the [organization, government unit, school]? |
| Interviewee: |  |
| Reviewer: | How did your relationship with [organizing initiative] begin? What motivated you and/or your [organization, government unit, school] to work with [organizing initiative]? [Probe] Do you share particular goals or objectives? |
| Interviewee: |  |
| Reviewer: | Please name the individuals from the organization who you work with the most? What is their role? |
| Interviewee: |  |
| Reviewer: | How have you and/or your [organization, government unit, school] worked with [organizing initiative] to pursue [mutual goal]? [Probe] How often do you meet? Can you describe the work that happens in these meetings? Who are the people at the table during these meetings? Have you co-hosted any meetings, events, or actions in the community to advance [mutual goal]? |
| Interviewee: |  |
| Reviewer: | Would you say that you and [organizing initiative] have been successful in achieving your goals? Why or why not? [If yes] What are some successes that you’ve had? |
| Interviewee: |  |
| Reviewer: | How has working with [organizing initiative] impacted you and your work? [Probes] Has it brought to light new issues, research or data related to education that you didn’t know existed? |
| Interviewee: |  |
| Reviewer: | Do you anticipate working with [organizing initiative] in the future? |
| Interviewee: |  |
| Reviewer: | Now that we have an understanding of your collaborative work with [organizing initiative], I’d like to ask you about [organizing initiative’s] role in the community. How would you describe this role? [Follow up] Do you believe that [organizing initiative’s] work is aligned to the needs of the community? Why or why not? |
| Interviewee: |  |
| Reviewer: | Do you believe that parents working with [organizing initiative] are knowledgeable about education in [community]? Why or why not? [Probe] Can you speak about any specific reports or knowledge that the group disseminated to the public? |
| Interviewee: |  |
| Reviewer: | Do you believe that parents working with [organizing initiative] are strong community leaders? Why are why not? If possible, provide an example of a parent leader working with [organizing initiative] who has demonstrated strong leadership. |
| Interviewee: |  |
| Reviewer: | Has [organizing initiative] made any changes to improve education in the community? What types of changes have they made? [Follow up] Do you think that these changes will have/have had an important impact on schools? Why or why not? [Follow up] Do you think that these changes will help/have helped advance student achievement? Why or why not? |
| Interviewee: |  |
| Reviewer: | Do you think that the changes [organizing initiative] made will be sustained over the long-term? Why are why not? |
| Interviewee: |  |
| Reviewer: | How has the nature of your relationship with the organization evolved or changed? |
| Interviewee: |  |
| Reviewer: | What challenges has [X parent organizing initiative] faced in trying to achieve its goals, if any? |
| Interviewee: |  |
| Reviewer: | Do you believe that [organizing initiative] has to ability to effect change in the future? Why or why not? |
| Interviewee: |  |

## Appendix F: Observation Form

Directions: Record low-inference observations that bear on each of the indicators listed on the form. Recording only low-inference observations helps Reviewers maximize the range of relevant facts that they observe and diminish the impact of unconscious preconceptions that can hamper the collection of facts about what actually is occurring. Low-inference observations record only what the Reviewer actually—and factually—sees or hears, without expressing any judgments about the meaning of the observation or whether it provides positive or negative evidence in regard to the indicator in question.

For example, the following statement is a low inference observation: “*parent leader held 2 house meetings during June, attended by 15 families with school children who described schools with dirty hallways and bathrooms and 10-year-old textbooks*”. The following report of the same facts contains high-inference conclusions that are best avoided during the process of collecting (as opposed to later analyzing) the facts: “*parent leader held only 2 house meetings during June, attended by a small number of families with school children who provided powerful evidence of poor conditions in their schools*”.

Reviewer Observation Form (Page 1)

|  |  |
| --- | --- |
| **Indicator** | **Observed or reported facts** |
| **Organizing Infrastructure** |  |
| **Commitment to Building Parent Power** |  |
| **Community Understanding** |  |
| **Organizing Model**  *Theory of Change* |  |
| **Organizing Model** *Measurable Outcomes* |  |
| **Organizing Model** *Reflective Practice* |  |
| **Financial Stability** |  |
| **Organizing Staff Capacity** |  |

Reviewer Observation Form (Page 2)

|  |  |
| --- | --- |
| **Indicator** | **Observed or reported facts** |
| **Organizing Skill** |  |
| **Leadership Development** *Parent Leader Base-Building* |  |
| **Leadership Development** *Parent Leader Capacity-Building* |  |
| **Strategy Development and Implementation** *Research and Issue Definition* |  |
| **Strategy Development and Implementation** *Strategic Campaign Development* |  |
| **Strategy Development and Implementation** *Campaign Execution* |  |
| **External Relationship-Building** |  |

Reviewer Observation Form (Page 3)

|  |  |
| --- | --- |
| **Indicator** | **Observed or reported facts** |
| **Organizing Impact** |  |
| **Expanded Parent and Community Power** *Constituent Growth* |  |
| **Expanded Parent and Community Power** *Knowledge about Schools and School Systems* |  |
| **Expanded Parent and Community Power**  *Civic Capacity* |  |
| **Expanded Parent and Community Power**  *Civic Participation* |  |
| **Expanded Parent and Community Power**  *Perceived Influence* |  |
| **Expanded Parent and Community Power**  *Parents as Powerful Agents* |  |

Reviewer Observation Form (Page 4)

|  |  |
| --- | --- |
| **Indicator** | **Observed or reported facts** |
| **Organizing Impact** |  |
| **Improved Educational Institutions**  *Articulation of the Win* |  |
| **Improved Educational Institutions**  *Education Landscape Changes* |  |
| **Improved Educational Institutions**  *Educational Equity* |  |
| **Improved Educational Institutions**  *Sustainability* |  |

## Appendix G: Rating Form

Please complete the following form for the organizing initiative that you evaluated by placing a check in the underdeveloped (UD), developing (D), proficient (P), or well developed (WD) box for each indicator. For indicators with sub-indicators (*in italics)*, *only* fill in ratings for the sub-indicators. Do not fill in ratings in gray-shaded boxes.

Organizing initiative:

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  | **UD** | **D** | **P** | **WD** |
| Organizing Infrastructure |  |  |  |  |
| Commitment to Building Parent Power |  |  |  |  |
| Community Understanding |  |  |  |  |
| Organizing Model |  |  |  |  |
| *Theory of Change* |  |  |  |  |
| *Measurable Outcomes* |  |  |  |  |
| *Reflective Practice* |  |  |  |  |
| Financial Stability |  |  |  |  |
| Organizing Staff Capacity |  |  |  |  |
| Organizing Skill |  |  |  |  |
| Leadership Development |  |  |  |  |
| *Parent Leader Base-Building* |  |  |  |  |
| *Parent Leader Capacity-Building* |  |  |  |  |
| Strategy Development Implementation |  |  |  |  |
| *Research and Issue Definition* |  |  |  |  |
| *Strategic Campaign Development* |  |  |  |  |
| *Campaign Execution* |  |  |  |  |
| External Relationship-building |  |  |  |  |
| Organizing Impact |  |  |  |  |
| Expanded Parent and Community Power |  |  |  |  |
| *Constituent Growth* |  |  |  |  |
| *Knowledge about Schools and Systems* |  |  |  |  |
| *Civic Capacity* |  |  |  |  |
| *Civic Participation* |  |  |  |  |
| *Perceived Influence* |  |  |  |  |
| *Parents as Powerful Agents* |  |  |  |  |
| Improved Educational Institutions |  |  |  |  |
| *Articulation of the Win* |  |  |  |  |
| *Education Landscape Changes* |  |  |  |  |
| *Educational Equity* |  |  |  |  |
| *Sustainability* |  |  |  |  |

## Appendix H: Feedback Form

Please complete the following form for the organizing initiative that you evaluated, which will support them in reflecting on and improving their work.

Areas of Strength

Listed below are three strengths of the organizing initiative. The Review Team encourages the organizing initiative to consider how it might use these capacities to drive improvement in other areas.

* Strength 1:
* Strength 2:
* Strength 3:

Areas for Growth

Listed below are three areas in which the organizing initiative has significant room for improvement. The Review team encourages the organizing initiative to consider these areas and to use them as a starting point when setting goals for the next year or revising existing goals.

* Area of growth 1:
* Area of growth 2:
* Area of growth 3:

Suggestions for Next Steps

Below are some considerations for next steps for the initiative based on their strengths and areas for growth.

## Appendix I: Protocols for Evaluation Feedback

**Proposed questions for Reviewers:**

*Site Visit Preparation*

* How effective was the Reviewer training in preparing you to conduct the Framework evaluation? Did you feel prepared to collect evidence using the site visit process and tools? Did you feel prepared to make judgments about initiative quality?
* What suggestions do you have to improve this training in the future?
* Describe your experience reviewing data and documentation prior to the site visit. How valuable was this process to your overall evaluation of the organizing initiative?
* How long did it take to prepare for the site visit, i.e. to review data and documentation and other information about the organizing initiative?
* Overall, what changes, if any, should be made to improve Reviewer preparation for the site visit?

*Site Visit*

* Based on what you observed, how receptive were the organizing initiative’s staff and parents to the review process? How could the review process be changed, if at all, to increase receptivity to the process?
* Describe your experience engaging in conversations with staff and parents. How valuable were these conversations to your overall evaluation of the organizing initiative? Were the interview protocols easy or difficult to use? How would you improve these protocols, if at all?
* How long did the site visit take? Would you say that it was too long, too short, or about right?
* How much did the original schedule for the site visit change? Why were these changes made?

*Rating the organizing initiatives*

* How difficult was it to gather evidence for each of the standards and indicators? Would you change the site visit process in any way so that you collect more evidence? Would you change the Rubric?
* Were the Observation Form, Rating Form, and Feedback Form useful to you? Where they easy or difficult to fill out? How would you improve these forms, if at all?
* Overall, do you believe that you gained an authentic picture of the effectiveness of the initiative? Why or why not?
* Did you feel confident in your ultimate ratings? Why or why not?

**Proposed questions for parent leaders and other participants from organizing initiatives:**

*Site Visit Preparation*

* How difficult was it to coordinate the site visit? In particular, how challenging was it to coordinate with parents’ schedules?
* How would you characterize the reaction of parents and staff to participating in the site visit?
* Did you feel prepared for the site visit? Why or why not?
* What changes would you suggest to improve the site visit preparation process? Would you improve the information provided and/or the level or type of communication with the Implementation Team prior to the review?
* How effective was the e-portfolio process in supporting self-evaluation and learning?
* In total, how many hours did you spend compiling the e-portfolio?
* What changes would you make to the e-portfolio process, if any?

*Site Visit*

* How would you characterize the reaction of parents and staff to the site visit activities? Did participants find the questions asked relevant to their work? Were Reviewers effective at facilitating group conversations?
* How effectively do you feel that the site visit captured the steps taken and results achieved by your organizing initiative? Why?
* How could the site visit process be amended to better understand the initiative being reviewed and its results?
* How effective were planning and logistics during the site visit?
* How long did the site visit take? Would you say that it was too long, too short, or just about right?

*Feedback and Improvement Process*

* How effectively did feedback from the site visit process help you understand your initiative’s strengths and areas for improvement? Why?
* What feedback was most useful to you? What feedback was less useful?
* Did feedback from the site visit process facilitate a dialogue about improvement among parent leaders and staff? Did it facilitate any follow-up actions?
* Is the Framework a useful framework for thinking about what makes an effective organizing initiative? Why or why not? How could the Framework be improved?

## Appendix J: Organizing Evaluation Framework Rubric

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
|  | | **Underdeveloped (Level 1)** | **Developing (Level 2)** | | | **Proficient (Level 3)** | **Well Developed (Level 4)** |
| **Organizing Infrastructure** | | | | | | | |
| **Commitment to Building Parent Power** | | The organizing initiative’s mission, culture, and priorities demonstrate **no commitment** to developing the capacity of low-income public school parents and communities in Connecticut and/or beyond to demand educational equity | | The organizing initiative’s mission, culture, and priorities demonstrate a **weak commitment** to developing the capacity of low-income public school parents and communities in Connecticut and/or beyond to demand educational equity | | The organizing initiative’s mission, culture, and priorities demonstrate a **satisfactory level of commitment** to developing the capacity of low-income public school parents and communities in Connecticut and/or beyond to demand educational equity | The organizing initiative’s mission, culture, and priorities demonstrate a **powerful commitment** to developing the capacity of low-income public school parents and communities in Connecticut and/or beyond to demand educational equity |
| **Community Understanding** | | The organizing initiative’s staff displays **no understanding** of the community context in which the initiative operates (e.g., they are **not able** to speak about community resources, political dynamics, school quality issues, and member experiences) | | The organizing initiative’s staff displays a **weak understanding** of the community context in which the initiative operates (e.g., they are able to speak **in a limited way** about community resources, political dynamics, school quality issues, and member experiences) | | The organizing initiative’s staff displays **some significant understanding** of the community context in which the initiative operates (e.g., they are able to speak **in a relatively informed way** about community resources, political dynamics, school quality issues, and member experiences) | The organizing initiative’s staff displays a **strong understanding** of the community context in which the initiative operates (e.g., they are able to speak **in a well-informed way** about community resources, political dynamics, school quality issues, and member experiences**)** |
| **Organizing Model**  *Theory of Change* | | The organizing initiative **does not have a theory of change** for increasing parent leadership and collective power to improve education | | The organizing initiative has a **weak theory of change** for increasing parent leadership and collective power to improve education (e.g., the initiative’s strategies and desired outcomes **are not well-defined** or there is **limited** logic, research, experience, or other support backing the strategy for achieving change) | | The organizing initiative has a **viable theory of change** for increasing parent leadership and collective power to improve education (e.g., the initiative’s strategies and desired outcomes **are sufficiently** **defined** or there is **some significant** logic, research, experience, and/or other support backing the strategy for achieving change) | The organizing initiative has a **well-developed and compelling theory of change** for increasing parent leadership and collective power to improve education (e.g., the initiative’s strategies and desired outcomes **are very well defined** and there is **strong** logic, research, experience, and/or other supportbacking the strategy for achieving change) |
|  | | **Underdeveloped (Level 1)** | | **Developing (Level 2)** | | **Proficient (Level 3)** | **Well Developed (Level 4)** |
| **Organizing Infrastructure** | | | | | | | |
| **Organizing Model**  *Measureable Outcomes* | The organizing initiative uses **no measurable outcomes and goals** for evaluating its change theory's validity and implementation rigor | | | | The organizing initiative uses **limited measurable outcomes and goals** for evaluating its change theory's validity and implementation rigor | The organizing initiative uses **satisfactory measurable outcomes and goals** for evaluating its change theory's validity and implementation rigor | The organizing initiative uses **well developed and rigorous measurable outcomes and goals** for evaluating its change theory's validity and implementation rigor |
| **Organizing Model**  *Reflective Practice* | The organizing initiative **does not** adapt and improve its strategy based on evidence of success or failure (e.g., it engages in **no** debrief sessions after events and **does not** develop and use data-based reports and reflections to help improve its work) | | | | The organizing initiative takes **limited steps** to adapt and improve its strategy based on evidence of success or failure (e.g., it **only** **occasionally** engages in debrief sessions after events and **only rarely** develops and uses data-based reports and reflections to help improve its work) | The organizing initiative takes **some significant steps** toadapt and improve its strategy based on evidence of success or failure (e.g., organizing staff and parent leaders engage **with some frequency** in debrief sessionsafter events and develop and use data-based reports and reflections to improve their work **in a sufficient way**) | The organizing initiative takes **well developed and effective steps** to adapt and improve its strategy based on evidence of success or failure (e.g., organizing staff and parent leaders **consistently** engage in debrief sessionsafter events and **actively and frequently** develop and use data-based reports and reflections to make changes in their work) |
| **Financial Stability** | The organizing initiative **does not have a stable financial base** (e.g., it **lacks capital** to satisfy current obligations **and/or a plan** to satisfy future obligations) | | | | The organizing initiative has a **weak financial base** (e.g., it has **limited capital** to satisfy current obligations and/or a **limited plan** for satisfying future obligations) | The organizing initiative has a **satisfactory financial base** (e.g., it has **sufficient capital** to satisfy current obligations and a **sufficient plan** for satisfying future obligations) | The organizing initiative has **ample financial resources** (e.g., its **capital exceeds its obligations** and it has a **well-developed plan** for satisfying future obligations) |
| **Organizing Staff Capacity** | The organizing initiative includes lead organizers with **no experience, expertise or observed success** in enhancing parents’ or other community members’ exercise of collective power (e.g., staff have **never** worked in the field of community organizing or social action and has no observable results | | | | The organizing initiative includes lead organizers with **limited experience, expertise or observed success** in enhancing parents’ or other community members’ collective power (e.g., staff have worked for **only a limited time**, in a **limited way or with limited results** in the field of community organizing or social action) | The organizing initiative includes lead organizers with **some significant experience, expertise** **or observed success** in enhancing the exercise of collective power of parents or other community members (e.g., staff have worked for **several years** in the field of community organizing or social action with observable results) | The organizing initiative includes lead organizers with **substantial experience, expertise or observed success** in maximizing the exercise of collective power of parents or other community members (e.g., staff have worked in the field of community organizing or social action for **many years with observable results**) |
|  | **Underdeveloped (Level 1)** | | | | **Developing (Level 2)** | **Proficient (Level 3)** | **Well Developed (Level 4)** |
| **Organizing Skill** | | | | | | | |
| **Leadership Development**  *Parent Leader Base-Building* | The organizing initiative **takes no steps to build** an expanding cohort of committed parent leaders (e.g., it **does not** conduct 1:1 conversations, house meetings, community meetings, or other events to build relationships and engage leaders) | | The organizing initiative **takes** **limited steps** to build an expanding cohort of committed parent leaders (e.g., it **only** **infrequently** conducts 1:1 conversations, house meetings, community meetings, or other events to build relationships and engage leaders and has **limited** turnout and follow-up) | | | The organizing initiative **takes some significant steps** to build an expanding cohort of committed parent leaders (e.g., it **regularly** conducts 1:1 conversations, house meetings, community meetings, or other events to build relationships and engage leaders and has a **sufficient amount** of turnout and follow-up) | The organizing initiative **takes strong and consistently effective steps** to build an expanding cohort of committed parent leaders (e.g., it conducts **extensive** 1:1 conversations, house meetings, community meetings, or other events to build relationships and engage leaders and has **substantial** turnout and follow-up) |
| **Leadership Development**  *Parent Leader Capacity-Building* | The organizing initiative **does not develop** parent leadership capacity (e.g., parents receive **no support and opportunities** to take ownership over organizing work and to learn about education and education systems) | | The organizing initiative **takes limited steps** to develop parent leadership capacity (e.g., parents receive **weak and infrequent support** **and opportunities** to take ownership over organizing work and to learn about education and education systems) | | | The organizing initiative **takes some significant steps** to develop parent leadership capacity (e.g., parents receive a **fair amount of support** **and opportunities** to take ownership over organizing work and to learn about education and education systems) | The organizing initiative **takes** **strong and consistently effective steps** to develop parent leadership capacity (e.g., parents receive **substantial support and opportunities** to take ownership over organizing work and to learn about education and education systems) |
| **Strategy Development and Implementation**  *Research and Issue Definition* | Parent leaders, with the support of staff, **gather no information** to hone their understanding of education issues and craft solutions (e.g., they **do not** elicit parents’ concerns about the local education context; engage with experts, current research, and data; or assess the political climate surrounding issues) | | Parent leaders, with the support of staff, **take limited steps** to gather information to hone their understanding of education issues and craft solutions (e.g., they **take** **only occasional opportunities** to elicit parents’ concerns about the local education context; engage with experts, current research and data; and assess the political climate surrounding issues) | | | Parent leaders, with the support of staff, **take some significant steps** to gather information to hone their understanding of education issues and craft solutions (e.g., they **take a fair number of opportunities** to elicit parents’ concerns about the local education context; engage with experts, current research and data; and assess the political climate surrounding issues) | Parent leaders, with the support of staff, **take strong and consistently effective steps** to gather information to hone their understanding of education issues and craft solutions (e.g., they **undertake substantial and successful efforts** to elicit parents' concerns about the local public education context, engage with experts, current research and data; and assess the political climate surrounding issues) |
|  | **Underdeveloped (Level 1)** | | **Developing (Level 2)** | | | **Proficient (Level 3)** | **Well Developed (Level 4)** |
| **Organizing Skill** | | | | | | | |
| **Strategy Development and Implementation**  *Strategic Campaign Development* | Parent leaders, with the support of staff, **develop no strategic campaigns** for educational equity (e.g., they **do not** define campaign strategies and goals, devise campaign tactics, or allocate resources to campaigns) Or, the organizing initiative is entirely led by staff. | | Parent leaders, with the support of staff, **take only weak steps** to develop strategic campaigns for educational equity (e.g., campaign strategies and goals are **poorly** defined, campaign tactics are **inappropriate or** **inadequately developed**, and **few** resources are allocated to campaigns) | | | Parent leaders, with the support of staff, **take** **some significant steps** to develop strategic campaigns for educational equity (e.g., they **sufficiently** define campaign strategies and goals, utilize **appropriate** tactics in those campaigns, and allocate **adequate** resources to them) | Parent leaders, with the support of staff, **take strong and consistently effective steps** to develop strategic campaigns for educational equity (e.g., they **expertly** define campaign strategies and goals, use an **optimal balance** of tactics,includingnegotiation and/or collaboration and public pressure to address their defined education issue, and **expertly** allocate resources) |
| **Strategy Development and Implementation**  *Campaign Execution* | Parent leaders, with the support of staff, **do not implement campaign plans** for achieving educational equity. | | Parent leaders, with the support of staff, implement their campaign plans for achieving educational equity in a **limited way** (e.g., they **do not follow through with many** of their campaign plans, and/or campaign strategies are **poorly** executed) | | | Parent leaders, with the support of staff, implement their campaign plans for achieving educational equity in a **satisfactory way** (e.g., they **follow through with most** of their campaign plans, and campaign strategies are **adequately** executed) | Parent leaders, with the support of staff, implement their campaign plans for achieving educational equity in an **exemplary way** (e.g., they **follow through with nearly all** of their campaign plans, and campaign strategies are executed in an **comprehensive and effective** way) |
| **External Relationship- building** | Parent leaders and staff **do not** collaborateand negotiate with other institutions, organizations, and stakeholders to envision and implement educational changes (e.g., they engage in **no meetings** with allies or prospective allies, and they do not partner on or co-plan events or actions with them) | | Parent leaders and staff **only occasionally** collaborate and negotiate with other institutions, organizations, and stakeholders to envision and implement educational changes (e.g., they engage in only a **small number of** meetings with allies or prospective allies, and they partner on or co-plan only a **small number** of events or actions with them) | | | Parent leaders and staff engage in **some significant amount** ofcollaborationand negotiation with other institutions, organizations, and stakeholders to envision and implement educational changes (e.g., they engage in **a moderate number of** meetings with allies or potential allies and partner on or co-plan a **moderate number** ofevents or actions with them) | Parent leaders and staff **actively and effectively** collaborate and negotiate with other institutions, organizations, and stakeholders to envision and implement educational changes (e.g., they **meet often** with allies or potential allies and **actively** partner on or co-plan events or actions with them) |

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|  | **Underdeveloped (Level 1)** | **Developing (Level 2)** | **Proficient (Level 3)** | **Well Developed (Level 4)** |
| **Organizing Impact** | | | | |
| **Expanded Parent and Community Power**  *Constituent Growth* | Since its inception, the organizing initiative has experienced **no** growth inits constituency for improving educational equity, including its base of parents, parent leaders, and partners | Since its inception, the organizing initiative has experienced **limited growth** in its constituency for improving educational equity, including its base of parents, parent leaders, and partners | Since its inception, the organizing initiative has experienced **some significant growth** in its constituency for improving educational equity, including its base of parents, parent leaders, and partners | Since its inception, the organizing initiative has experienced **steady and substantial growth** in its constituency for improving educational equity, including its base of parents, parent leaders, and partners |
| **Expanded Parent and Community Power**  *Knowledge about Schools and School Systems* | Parents **have no understanding** of how to support children's academic success and how to address barriers to student learning within schools | Parents **have a limited understanding** of how to support children's academic success and how to address barriers to student learning within schools | Parents **have some significant understanding** of how to support children's academic success and how to address barriers to student learning within schools | Parents have a **deep and shared understanding** of how to support children's academic success and how to address barriers to student learning within schools |
| **Expanded Parent and Community Power**  *Civic Capacity* | The parent base **has no belief** in their ability to work together to affect change and **no sense** of collective belonging and mutual commitment to the organizing initiative and its goals | The parent base has an **emerging belief** in their ability to work together to affect change and a **limited sense** of collective belonging and mutual commitment to the organizing initiative and its goals | The parent base has **some significant belief** in their ability to work together to affect change and **some significant sense** of collective belonging and mutual commitment to the organizing initiative and its goals | The parent base has a **deep belief** in their ability to work together to affect change and a **deep sense** of collective belonging and mutual commitment to the organizing initiative and its goals |
| **Expanded Parent and Community Power**  *Civic Participation* | Parents have taken on **no** new roles in the public sphere resulting from organizing efforts, including in leadership positions in their children's school and school districts and in school-related and other elections | Among parents, there is **limited growth** in participation in the public sphere resulting from organizing efforts, including in leadership positions in their children's school and school districts and in school-related and other elections | Among parents, there is **some significant growth** in participation in the public sphere resulting from organizing efforts, including in leadership positions in their children's school and school districts and in school-related and other elections | Among parents, there is **substantial growth** in participation in the public sphere resulting from organizing efforts, including in leadership positions in their children's school and school districts and in school-related and other elections |

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|  | **Underdeveloped (Level 1)** | **Developing (Level 2)** | **Proficient (Level 3)** | **Well Developed (Level 4)** |
| **Organizing Impact** | | | | |
| **Expanded Parent and Community Power**  *Perceived Influence* | Parents in the initiative are **not recognized** as effective and expert change agents by important education stakeholders (e.g., education stakeholders **do not believe** in the initiative's ability to effect change, and the initiative has **no** media recognition) | Parents in the initiative are **beginning to be recognized** as effective and expert change agents (e.g., education stakeholders have an **emerging belief** in the initiative's ability to effect change, and the initiative has **limited** media recognition) | Parents in the initiative have received **some significant** **recognition** as effective and expert change agents (e.g., education stakeholders have **some confidence** in theinitiative's ability to effect change, and the initiative has a **fair amount of** media recognition) | Parents in the initiative are **widely recognized** as effective and expert change agents (e.g., education stakeholders have **substantial confidence** in the initiative's ability to effect change, and the initiative has **broad** media recognition) |
| **Expanded Parent and Community Power**  *Mutual Accountability* | Parents in the initiative have **no** relationshipswith educators, education officials, and other influential actors | Parents in the initiative have **few or** **modest relationships** with educators, education officials, and other influential actors (i.e. relationships are characterized by **limited** responsiveness and transparency, and there is **limited** shared decision-making) | Parents in the initiative have **some significant relationships** with educators, education officials, and other influential actors (i.e. relationships are characterized by a **fair degree** ofresponsiveness and transparency, and there is **a fair degree** ofshared decision-making) | Parents in the initiative have developed **deep and substantial relationships** with educators, education officials, and other influential actors (i.e. relationships are characterized by **strong degree** ofresponsiveness and transparency, and there is **consistent and active** shared decision-making) |
| **Improved Educational Institutions**  *Articulation of the Win* | Parents have **no** ability to describe the education win or how they achieved that win (e.g., **they cannot say** how the education win aligns with or differs from original goals, how obstacles or opposition was overcome, how partnerships or alliances formed, or how and why strategies evolved over time) | Parents have a **limited ability** to describe the education win and how they achieved that win (e.g., they have a **weak ability** to explain how the education win aligns with or differs from the original goals, how obstacles or opposition was overcome, how partnerships or alliances formed, and how and why strategies evolved over time) | Parents have an **adequate ability** to describe the education win and how they achieved that win (e.g., they **can speak with some significant degree of authority** about how the education win aligns with or differs from the original goals, how obstacles or opposition was overcome, how partnerships or alliances formed, and how and why strategies evolved over time) | Parents have an **advanced ability** to describe the education win and how they achieved that win (e.g., they **can speak expertly** about how the education win aligns with or differs from the original goals, how obstacles or opposition was overcome, how partnerships or alliances formed, how the win strategically sets up additional campaigns, and how and why strategies evolved over time) |

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|  | **Underdeveloped (Level 1)** | **Developing (Level 2)** | **Proficient (Level 3)** | **Well Developed (Level 4)** |
| **Organizing Impact** | | | | |
| **Improved Educational Institutions**  *Education Landscape Changes* | The organizing initiative had **no** education win or its win **did not and most probably will not** result in shiftsin the education landscape, including shifts in leadership, governance, policy or practice at the community, school, district, or state level | The organizing initiative’s education win resulted in, or will likely result in, **only** **modest** shiftsin the education landscape, including shifts in governance, policy or practice at the community, school, district, or state level | The organizing initiative’s education win resulted in, or will likely result in, **some significant** shiftsin the education landscape, including shifts in leadership, governance, policy or practice at the community, school, district, or state level | The organizing initiative’s education win resulted in, or will likely result in, **large and important** shiftsin the education landscape, including shifts in leadership, governance, policy or practice at the community, school, district, or state level |
| **Improved Educational Institutions**  *Educational Equity* | The change to the education landscape **did not** and most probably will notimprovethe equitable distributionof learning outcomes for children in high-need communities | The change to the education landscape has **only** **modestly** improved, or probably will only modestly improve, the equitable distribution of learning outcomes for children in high-need communities | The change to the education landscape has generated or probably will generate **some significant** improvements **in** the equitable distribution of learning outcomes for children in high-need communities | The change to the education landscape has **substantially** improved, or probably will substantially improve, the equitable distribution of learning outcomes for children in high-need communities |
| **Improved Educational Institutions**  *Sustainability* | There are **no reasons** to predictthat the change in the education landscape or improvements in the equitable distribution of learning outcomes will be sustained, replicated, and/or augmented over the next five years (e.g., the change in the education landscape is **strongly opposed** bytheeducators and education officials responsible for implementing it, or it affected onlya s**mall and isolated** aspect of current inequities) | There are **limited reasons** to predict that the change in the education landscape and improvements in the equitable distribution of learning outcomes will be sustained, replicated, and/or augmented over the next five years (e.g., the change in the education landscape has **little support** amongtheeducators and education officials responsible for implementing it, or it affected only **a modest and atypical** aspect of current inequities) | There are **some significant reasons** to predictthat the change in the education landscape as well as improvements in the equitable distribution of learning outcomes will be sustained, replicated, and/or augmented over the next five years (e.g., the change in the education landscape has a **fair degree of** **support** amongtheeducators and education officials responsible for implementing it and provides a **meaningful precedent** for removing other aspects of current inequities) | There are **strong reasons** to predict that the change in the education landscape as well as improvements in the equitable distribution of learning outcomes will be sustained, replicated, and/or augmented over the next five years (e.g., the change in the education landscape has a **substantial support** amongtheeducators and education officials responsible for implementing it and provides a **compelling precedent** for removing other aspects of current inequities) |

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# Endnotes

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27. Examples include: (a) expansion, preservation, or more equitable distribution of financial, human, and material resources for public education; (b) enhancement of curriculum, instruction, and assessment so that it is more responsive, rigorous, and appropriate; (c) improvement of school climate, such as enhancement of disciplinary practices, behavioral expectations, or school-community partnerships; (d) provision of additional access to opportunities for students, such as enhancement of academic or socio-emotional supports, learning time, or enrollment processes; (e) recruitment, development, support, and retention of effective teachers and school leaders; (f) expansion of structures for community participation in educational decision-making; (g) election of a candidate or candidates who support equitable access to high-quality education; (h) prevention or minimization of negative actions related to any of the above. [↑](#footnote-ref-2)
28. Gold, Simon & Peralta (2013). Woods Fund (2016). Renee & McAlister (2011). Alliance for Justice (2016a). [↑](#endnote-ref-26)
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36. The average rating for each sub-indicator and the average rating for indicators without sub-indicators is simply an average of Reviewer 1’s and Reviewer 2’s ratings. The average rating for an indicator with sub-indicators is the weighted average of the sub-indicators, with the weighting specified in the Weights sheet. The average rating for the category is the weighted average of indicators, with the weights specified in the Weights sheet. [↑](#footnote-ref-3)
37. A consensus estimate calculates the simple percentage of agreement between Reviewers (i.e. the sum of the times that Reviewers agreed divided by the total count of indicators and sub-indicators). [↑](#footnote-ref-4)
38. Norming is a process that helps Reviewers develop a shared understanding of the meaning of rubric elements, what the different performance levels are intended to capture, and what level of rigor should be applied in distinguishing the levels. [↑](#footnote-ref-5)
39. See Appendix F for a discussion of low-inference observations [↑](#footnote-ref-6)
40. Rhangelli (2009). [↑](#endnote-ref-34)
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