

Project Goals & Summary of Activities September 2004

This paper should be read in conjunction with a companion piece, "FACT Community Organizing Evaluation Project: Lessons Learned," that provides more detail about the Project's approach and "What's Evaluation Got to Do With It," the report of a meeting on evaluation hosted by FACT in May 2004.

Early History

In 1999, the French American Charitable Trust (FACT) began its "Community Organizing Evaluation Project" to strengthen community organizing groups focusing on evaluation strategies. FACT had been regularly convening several of its grantees from around the country for peer-to-peer learning exchanges and strategic thinking about difficult issues, from globalization's impacts on working people to recruitment of organizers. Ideas about evaluation and its importance for advancing community organizing (CO) were considered and extensively debated and the groups played a key role in conceptualizing the Project. There was an overall sense that organizations needed to become more adept at using evaluation tools to better communicate the true impact of their work. One of the grantees – the Environmental Health Coalition (EHC) in San Diego – offered to serve as the first testing ground for Project efforts. Two others also declared their readiness to participate at a later date.

The Project's initial goals were to develop **evaluation-related strategies** that could:

- #1 Help strengthen community-based organizations dedicated to achieving community empowerment, policy reforms and broad-based movement for social, economic and environmental justice.
- #2 Demonstrate the effectiveness and elevate the importance of community organizing for decision-makers in many different arenas.
- #3 Provide solid information and backup data to support strategies aimed at attracting new resources from foundations for community organizing groups and grassroots-led strategies of change.

FACT hired the consulting team of Emily Goldfarb and Larry Parachini to help launch the Project. During the team's early site visits with EHC to explore evaluation needs and develop work plans, it became clear that good evaluation design, products and outcomes to benefit EHC would take considerable time. EHC – using a special grant it had been awarded by the Jessie Smith Noyes Foundation for its years of exceptional performance – was well into the process of developing its Social Change for Justice (SCFJ) model.¹ The organization wanted assistance from the Project in formulating and integrating a process for on-going evaluation in SCFJ including assistance in developing evaluation tools and guidance for use by staff. The objectives and tasks envisioned were in line with the Project's first goal, and FACT gave the go-ahead for what became more than three years of collaborative work with EHC.

Because of the nature of the work with EHC, and that subsequently undertaken with the two other grantees – Kentuckians for the Commonwealth and Southern Echo (Mississippi) – the pursuit of FACT's Project goals two and three was placed on the back burner until a later time.

Project Approach

The groups the Project sought to assist – including, at Southern Echo's request, two others in its network (Citizens for Quality Education and ACTION/YIMS) – share many values and goals. All the groups focus on CO as a central strategy and depend on low-income people to plan, direct and contribute to their social change efforts. But, the many differences in these organizations – structures, constituencies, geography, program and issue mix, culture and style, etc. provided great challenges.

¹ The EHC Social Change for Justice Model is a framework that incorporates EHC's ideology (mission, goals, values and theory of change) with a method of evaluation, planning and working to increase EHC's ability to accomplish its goal of social and environmental justice.

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The Project's focus evolved organically to prioritize helping grantees develop their own plans, processes and, to the extent possible, capacities for doing evaluation themselves. Initially it was thought that products generated through work with one group would be transferable to the others. This was rarely the case. Instead, as discussed at length in the companion piece, the frameworks, processes and tools that the Project developed with groups were quite different. The differences not only reflected and responded to groups' unique characteristics and needs, but also accounted for differences in the groups' abilities and readiness to integrate evaluation with on-going planning and operations, as well as the resources they could devote to evaluation.

The Project's focus on evaluation came to be, more accurately stated, a focus on evaluation and program planning. In other words, the focus became linking evaluation processes to planning and decision making. For example, the Project helped weave evaluation into: communication, leadership development, environmental health, youth institute planning, and education reform, as well as some groups' overall strategic planning – efforts the groups had already prioritized as needing greater attention.

With three of the groups, the Project spent considerable time addressing organizational development issues (OD) in conjunction with evaluation design work. For example, one group's need had to do with building evaluation into an entirely new project still in the development phase. In dialogue about this project, it became clear that the objectives and plans needed to be sharpened. FACT's consultants helped this group work through its plans – facilitating meetings, preparing guidance for examining and deciding on options, etc. – while also helping develop a practical evaluation plan that could be implemented upon initiation of the project. As the companion piece describes, FACT's Project approach can be distinguished by the connection it made between evaluation and planning, but also the OD assistance it provided.

Project Activities and Accomplishments

All the work was done collaboratively with key staff and other leaders of the groups. Some products were more than a year in the making to account for new learning or circumstances, as well as provide for interruptions due to schedule and travel constraints. The products were a mix of evaluation tools and reports, analytic reports, guidance materials, education and peer learning sessions, meetings to model and test evaluation processes and tools, coaching, and other forms of assistance. The consultants conducted at least three and often more site visits with each group to learn about their work, build relationships and seek to understand their cultures and context. This level of engagement was not only highly informative but also essential for producing whatever useful results the groups may have gained from Project work.

The following list outlines many of the Project's accomplishments:

Environmental Health Coalition

- Developed concept plan for integrating evaluation into SCFJ model
- Created specific evaluation tools for data collection and documentation within the SCFJ model
- Revised EHC's "Process for Action," which guides internal decision making, to incorporate evaluation at every stage of the decision making process
- Refined SCFJ protocols that guide day-to-day operations to incorporate evaluation
- Conducted an evaluation of specific EHC campaign efforts – through on-site interviews and review of program activities – and prepared a report to help EHC meet a large foundation's requirements for re-funding
- Integrated evaluation design elements with EHC strategic plan
- Tested EHC's evaluation process with staff/community leaders examining a significant, long term EHC campaign (the successful closing of Master Plating)
- Facilitated organization-wide strategic planning, program, strategy, and organizational development meetings

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Kentuckians for the Commonwealth (KFTC)

- Determined priorities for evaluation within KFTC's on-going Management and Administrative Review (a major initiative leading to a "re-design" of KFTC)
- Developed guidance materials for determining organizational readiness and facilitating preparations for evaluation
- Focused on KFTC's communications strategy, with specific evaluation of the organization's newsletter, "Balancing the Scales." Activities included developing a reader survey, summarizing and analyzing returns and providing guidance for future decision making
- Focused on KFTC's leadership development strategy, leading to evaluation of its cluster training program (Coalfield Survival Schools and Chapter Development training). Activities included interviews with participants, review of materials, analysis of findings, and preparation of an evaluation report with recommendations for action
- Developed evaluation tools for on-going integration of organization-wide evaluation and planning, and for the communications and leadership development components

Southern Echo

- Developed evaluation guidance and tools to assess and communicate the work of Southern Echo with its grassroots groups
- Focused on providing evaluation guidance to two groups in Mississippi, CQE and ACTION/YIMS
- Developed draft document on the characteristics of effective community organizing
- Developed draft comprehensive framework for participatory self-evaluation of Southern Echo's type of community organizing

Citizens for Quality Education (CQE)

- Focused on developing evaluation guidance and tools for communications strategy in conjunction with other organizational development goals
- Facilitated strategic planning sessions for development of newsletter, radio talk show and other elements of CQE's communications strategy
- Prepared evaluation tools and guidance for the newsletter
- Provided guidance around the development of a short digital story telling video that highlights CQE's work, some of Southern Echo's characteristics of effective organizing and the video production capabilities of ACTION staff

ACTION/YIMS

- Focused on youth leadership development strategies of YIMS and organizational development needs of ACTION
- Facilitated strategic planning sessions for both organizations
- Developed concept paper and strategic planning/evaluation template for decision making around the development by YIMS of a youth leadership development institute

Emily Goldfarb and Larry Parachini were the primary authors of all three FACT CO Evaluation reports. FACT wishes to thank Emily and Larry for their tireless work on this project since its beginning in 1999. ■