Developing A Community Advocacy Movement For Public Education

A Field Guide

ACHIEVE TOGETHER

Empowering the Community. Working Together for Student Success.

September 2010

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Achieve Together is a community partnership that connects local residents with people, training, data and support to become advocates for positive change in the Charlotte Mecklenburg Schools (CMS) Achievement Zone.

The Lee Institute provides project management support to Achieve Together. The Lee Institute is a nonprofit organization that serves people, organizations, and the community through leadership development, design and management of collaborative projects, and citizen involvement. We believe in the collective power of collaboration, citizen engagement and civic leadership to achieve positive outcomes for our clients and their communities. We work creatively and strategically with individuals, civic and government organizations, and communities so they may advance their missions to serve their communities.

The Bill and Melinda Gates Foundation awarded a grant to The Lee Institute in December 2007 to strengthen the structure of the Charlotte Mecklenburg African American Agenda and to create a community of advocates for public education in the CMS Achievement Zone. This generous funding began a movement known as Achieve Together.

Why We Wrote this Guide

> "If your actions inspire others to dream more, learn more,
> do more and become more, you are a leader."
> ~John Quincy Adams

At The Lee Institute, we strive to be thought leaders and want to inspire others to strengthen their communities. We hope that our journey inspires yours.

People ramping up for any large-scale community change endeavor will benefit from knowledge of what has gone before—what has worked elsewhere and what to avoid. That being said, there is no tried and true instruction manual to assure success; each change initiative needs to be developed within the context of its own community. Here are a few things we learned along the way that we think apply to any grassroots advocacy movement:

- Recruiting people who are passionate about virtually any topic will likely produce effective and lasting advocates. These people are the most likely to bring sustained energy to community change work.

- Providing user-friendly subject matter data to new advocates builds their confidence and levels the playing field when it comes to group conversations.

- The extra effort to arrange for food, childcare and a convenient time and location for grassroots advocacy meetings is worth it; it removes real barriers to participation.

- Advocacy can be undertaken in small steps, even when the desired outcomes require huge change. Success begets success.

- Plan to stay engaged with your advocates for at least two years. Provide some level of logistical and technical assistance that supports the work and builds the group's capacity to function independently in the long run.

In this Field Guide, we share our story about Achieve Together, a civic engagement program of The Lee Institute, with the hope that others will be inspired by and learn from our experience. This Field Guide provides specific and useful information on how you can build a grassroots movement that focuses community will and participation to improve public education in your community.

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How this Field Guide Is Organized

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Charlotte, North Carolina is a vibrant city, representative of many of the trends of the south—rapid growth, diverse populations, and tensions between newcomers and long time residents. Its consolidated school system—Charlotte Mecklenburg Schools (CMS)—is the 18th largest system in the country, and has been identified as one of the key urban public school systems in the United States http://asumag.com/asu100/ 2009/enrollment/. In the 1970s, CMS became the first school system in the country to use busing for the purpose of integrating schools, and over the years, CMS has grown into a system where academic excellence for all students is a consistent theme.

Schools in CMS, due to a complex set of circumstances in the 1990's, began to re-segregate into two main categories—low performing schools with large populations of minority, poor students and schools with a large majority of white, high achieving students.

As this new circumstance emerged, CMS began a concentrated focus on the low performing schools; they formed the Achievement Zone which grouped 11 schools together in order to maximize resources and attention. The Achievement Zone was created to recognize those schools in most need of help. The schools have a large number of students with low test scores and low achievement.

The purpose of the Achievement Zone was to provide these schools with the resources needed to succeed with support in the following areas: transportation, discipline, professional development and instruction, exceptional children, human resources and communication. The goal was for the schools to excel and transition out of the Achievement Zone.

The Bill and Melinda Gates Foundation worked in partnership with CMS to pay particular attention to the Achievement Zone high schools, where graduation rates lagged behind those of CMS as a whole, and where there was high teacher turnover and a lack of parent involvement.

In December of 2007, the Bill and Melinda Gates Foundation awarded a grant to The Lee Institute to strengthen a local initiative to reduce educational disparities within the African American community and to design and implement a community initiative to engage parents, civic leaders, and community groups in support of the improvement of student outcomes in Charlotte Mecklenburg's Achievement Zone. This generous funding began a movement now known as Achieve Together.

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Achieve Together in 2010

Achieve Together is a community partnership that connects local residents with people, training, data and support to become advocates for positive change in CMS. Achieve Together is a project of The Lee Institute. The Lee Institute provides training, data and technical assistance to help people in the community work together to support important policy changes to make sure that every CMS student is prepared through their education to be successful in college, career and life.

The Lee Institute is a non-profit consulting practice based in Charlotte, North Carolina with a mission to serve and strengthen community through the collective power of public engagement, civic leadership and collaboration.

As of April 2010, Achieve Together had reached the following milestones:

- Research and production of:
  - *"An Overview of Education Trends: the Nation, CMS, and the Achievement Zone"*
  - *"Tracking the Education Dollar: A Citizen's Guide to Understanding the Funding of Charlotte Mecklenburg Schools"*

  > These materials, downloadable from www.leeinstitute.org, were developed to launch the advocacy efforts of local residents organized into eight Community Circles.

- Engaging approximately 10 citizens in each Circle for the first phase of six structured meetings; continuing technical assistance and support in the second phase as they plan and implement their advocacy strategies.

- Initiation of quarterly gatherings of all Circle members for peer support and assistance in finding synergy across groups.

- Training of The Right Question Project's (RQP) question formulation techniques to more than 70 citizens. RQP (www.rightquestion.org) helps people build the skills to advocate effectively for their children and communities in the field of education.

- Training of 12 Charlotte-Mecklenburg citizens, including some Circle members, as facilitators of the RQP method. One Circle subsequently engaged the trained RQP facilitators to teach about 100 parents from an academic enrichment program of Johnson C. Smith University.

- The Circles have become a community resource, as various community groups seek their input including the School Board and the local paper.

  > **The Advocacy Manual Includes:**
  > – Data sources and helpful links
  > – Advocacy best practices
  > – Tips for collaboration
  > – Tips for engaging and working with the media

- Completion of a practical hands-on advocacy manual (located at www.leeinstitute.org) for Circle members.

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Independent Circle Accomplishments:

- One Circle has initiated conversations with School Board members about the school system's strategic plan.
- Another Circle organized a public forum for school board candidates.
- Another Circle plans to engage CMS students in the development of PSAs to encourage students to stay in school.
- Two Circles have initiated partnerships with individual schools in order to find ways to collaborate to help schools meet students' needs.

As part of technical assistance, The Lee Institute has focused on assisting the Circles to work more independently. We have nurtured natural leaders within the groups and helped connect the Circles with longer term organizational homes interested in providing minimal ongoing logistical support to help them sustain and grow their work. We will continue to convene the Circle members quarterly in a combined facilitated session so that they may learn from and strengthen each other's advocacy efforts.

All of us in Charlotte who are working to grow support for public education have learned a great deal about engaging a community in this work. We know it takes time, resources, a sense of humor, persistence and the willingness to learn from mistakes.

We hope that this Guide offers a candid view of our local experience in creating a grassroots movement for public education and inspiration to communities elsewhere embarking on a similar challenge.

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Developing the Theory of Change

What Is It?
A theory of change (TOC) is a graphic representation of how a group of people plan to get from "point A" to "point B". Theories of change are generally reserved for complex change initiatives for which there is no proven formula; they are needed when the stakes are high and the path to the desired end is unknown or unproven. Starting with the end in mind, people work together to identify the conditions and actions they think are necessary to attain that particular outcome. The result is an illustration of the causal thinking and logic on the part of those invested in the outcome.

Why Is It Important?
A well-crafted theory of change makes it easy to describe to others how and why the desired change is expected to come about. A well-designed theory of change provides a common set of terms that stakeholders can use when they talk about their future plans. It's a great way to find areas of agreement among a group of stakeholders that may bring different perspectives to the table about how to get to "point B". By following a theory of change, people responsible for the outcome are more likely to engage in those activities that will lead to the desired end and steer clear of activities that aren't linked to the desired end. A theory of change will also give the stakeholders a reference point to refer back to over time to help evaluate progress.

How Did We Develop Our Theory of Change?
Developing our theory of change required an intensive seven-month process involving a broad base of community partners—CMS educators, parents from the Achievement Zone, non-profit leaders, and outside consultants provided by the Gates Foundation. The investment of time to get a diverse mix of people in the room and to carry out an inclusive process was worth it in the end. After all, we were about to undertake an ambitious community change effort for which there were no prescribed or proven steps. The planning team met extensively; these meetings were facilitated by The Lee Institute using techniques to assure a fair process where all voices were heard.

Theory of Change Guidelines

- Get the right people on board
- Gather and present the best background data available
- Bring everyone up to speed on the big change to which you aspire
- Design and share the process you plan to use to develop the theory of change
- Minimize the need for rework and build a strong support base for implementation.

The group started by developing a shared understanding of the challenge set forth by the Gates Foundation and reviewing data on Academic achievement within CMS. The team worked on articulating the long-term outcome and then explored the sequence of what they believe is required to produce that end result. To complete the theory of change, the planning team developed strategies as starting points for both building community capacity to get engaged in the school system as well as enhancing the community's belief system to recognize the importance of an education that prepares students for the demands of higher education and work.

For those of you who may be gearing up to begin development of a theory of change, we suggest going by the phrase "Well Begun Is Half Done". Taking the time to be sure the right people are at the table and have the data and group process needed to work effectively together pays off in the long run.

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Creating a Theory of Change

Know Your Audience
Identify the target population: who are the primary, secondary and tertiary customers?

Have a Vision
Go through a visioning exercise. The vision statement will next be translated into the long term outcome.

Define the Outcome
Create a long term outcome from the vision.

Identify the Preconditions
Identify the interval preconditions required for the long term outcome to be reached. You may need to develop several layers of preconditions.

Identify Indicators
Identify indicators for each precondition. These are measures of success — how you will know if you've achieved your goals.

Identify Action Steps
Identify the actions required to achieve each precondition. Some actions may cause multiple outcomes; some preconditions may require multiple actions.

Document Assumptions
Document assumptions that explain the causal links as a reality test.

Create a Plan
Build an implementation plan that clarifies who is going to do what by when. As a part of this step, identify the local assets, resources, capacities and supports available to accomplish this plan.

Create an Evaluation Plan
Build an evaluation plan that clarifies how indicators will be measured and data reported, by whom, to whom, with what frequency, and compared to what targets or thresholds. The group that develops the evaluation plan may not be the group that develops the TOC.

For more information about the steps in developing a TOC, visit
www.theoryofchange.org.

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Developing the Theory of Change

What Is Our Theory of Change?

Our theory of change reflects a key philosophical belief about what constitutes success in life. The planning team began its work by crafting a clear and concise <u>long-term outcome statement</u>—the ultimate purpose of Achieve Together:

> **More Achievement Zone students are graduating and are prepared for higher education, work and a successful life path**

The planning team came to agreement that success is not only being 'ready for higher education' as the Gates Foundation's theory of change proposed at the time, but also encompasses being ready for work and a successful life path. In developing the theory of change further, the planning team discerned that to achieve the long-term outcome there are two things—that is, <u>preconditions</u>— that had to be in place.

> **Community Capacity to Scale and Sustain Reforms in the Achievement Zone**
>
> The community is able to create and maintain efforts that will encourage higher achievement in Achievement Zone Schools

> **Increased Public and Political Will**
>
> The community at-large and decision makers demand increases in Achievement Zone student achievement

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Next, the team identified another level of preconditions—those necessary to produce community capacity, public and political will, and, ultimately more effective schools:

> **An expanded capacity for advocacy by the community at-large**
>
> The community has the skills & expertise to become involved and create the necessary alliances to become engaged in Achievement Zone school

> **A community that values Achievement Zone students who are graduating and prepared for higher education, work and a successful life path**
>
> The community's belief system recognizes the importance of an education that prepares Achievement Zone students for the demands of higher education and work

Here's where Achieve Together got its legs — with the introduction of 'advocacy' as a key ingredient! Expanded capacity for advocacy can only be possible if all segments of the community have the skills and expertise to become effectively engaged. Involvement and skill development emerges through a combination of awareness and structure for engaging different community constituencies.

The next step was to determine what an actual initiative or effort would look like—what we could do that would test this theory and put it in action.

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Advocacy work needs to:

- Build meaningful relationships among parents, the community and educators
- Involve Achievement Zone parents and/or guardians
- Involve numerous segments of the community
- Create ways for people to constantly be engaged and informed by easy-to-understand and accessible materials
- Have people in face-to-face situations
- Produce concrete action

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Research on Successful Community Advocacy Models

With our theory of change as our decision to focus on advocacy, the next step was to look at advocacy models. We engaged in a 'deep dive' on current successful models of community advocacy that fit our theory of change. The Public Education Research Institute of Queens University of Charlotte conducted research on best practices in community advocacy.

Specific Initiatives Researched by Queens University

- **Helping Empower Local People (HELP) in Charlotte**
- **Logan Square Neighborhood Association -- Part of Industrial Areas Foundation**
- **Mobile Area Education Foundation (Taking Responsibility)**

    * These first three initiatives resonated with us in particular due to their grassroots, community-centered and small group focus.

- Austin Interfaith (Austin Interfaith)
- Community Leadership Academy – part of Northwest Bronx Community and Clergy Coalition
- Graduate Certificate in Community Advocacy: The George Washington University and the Humane Society University
- Greater Boston Interfaith Industrial Areas Foundation
- Oakland Community Organizations: Unlocking the Power of Oakland. Unlocking the Power of Me – part of Industrial Area Foundations (Strong Neighborhoods Strong Schools)
- Quitman Street School
- Reach Out to Drop-Outs – Houston
- Sistas and Brothas United
- Schools for a New Society (SNS) – Hamilton County TN (Chattanooga)—
- Texas Industrial Areas Foundation and the Alliance Schools
- University-Assisted Community Schools – University of Pennsylvania (Community Agenda for America's Schools: Local Initiatives and the Netter Center for Community Partnerships)
- West Roxbury High School (and others) in Boston transformed into smaller, focused schools
- Youth on Board
- Youth United for Change

What the Research Told Us: Successful Strategies Used in Engaging Communities

Inclusion Is Key

There are no shortcuts to including all stakeholders: students, parents, business, educators in PK–12 as well as higher education. It is crucial that all are involved in the process to determine what is needed/wanted in the schools. Stakeholder endorsement is invaluable.

Build Relationships

An effective grassroots campaign involves wide use of face–to–face and one–on–one approaches to engage community members.

Think Global, Act Local

Advocacy works best when a local organization spearheads an initiative dealing with local issues. Local organizations understand that both the big picture and the local dynamics will ensure the efforts move forward.

Utilize Existing Structures

Engaging existing organizations rather than creating new ones builds local capacity and integrates the change effort into a community's sustainable infrastructure.

Establish Your Brand

Once strategies are determined, the campaign needs to be highly visible to the community with extensive branding such as:

- A charismatic spokesperson
- Success stories as well as compelling stories with facts that illustrate why the campaign is needed
- Short, catchy phrase or "tag line" that captures the essence of the message
  - e.g. 100 Pints in 100 Days (campaign for Community Blood Bank in Charlotte)
- Staying on message to reinforce main points

Engage Local Leadership

Recognize and build upon existing leadership within the local community for sustainability. Outside organizations can play leadership roles initially but must resist the temptation to "take it over" or dominate to the point where existing or emerging grassroots leaders feel peripheral to the cause.

Plan to Plan

Do not begin tactics prior to having a theory of change and an action plan that are created and endorsed by the community.

Identified by the researchers at Queens University
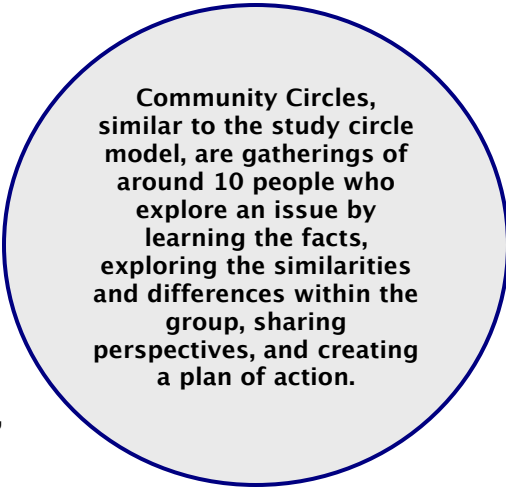
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Taking Action: Developing Community Circles

Why We Chose Community Circles

The Achieve Together Community Circle model emerged from our interest in the power of small group conversations and interpersonal relationships in creating change in a community.

Community Circles are a safe environment to explore potentially emotionally charged issues while establishing a foundation of experience, knowledge and relationships among the participants. The nature of the small group is conducive to candid dialogue. From their shared experience, members can continue to advance their work together after the structured sequence of Circle meetings ends.

Community Circles, similar to the study circle model, are gatherings of around 10 people who explore an issue by learning the facts, exploring the similarities and differences within the group, sharing perspectives, and creating a plan of action.

A facilitator is needed to guide each Community Circle in order to keep it on task and foster a fair and inclusive process where each meeting builds on the last. The facilitator guides the group through the standardized process while remaining flexible and responsive to the group's unique needs and dynamics. The facilitator may need to check in with members between meetings to be sure they feel the value of their contributions and to work out concerns that may not be appropriate to handle in a group setting. For Achieve Together, it was also important for the facilitator to keep in mind the need to build a cohesive group that can work together well after the structured sequence of Circle meetings ends.

Our Community Circle Model

Our Circles focused on ways that members could use their collective voice to bring attention to the achievement gap and the lower graduation rates within the Achievement Zone compared to the school system as a whole. They used local data about public education and the richness of each other's experiences to decide what policy or system changes they would like to push for. They learned about effective ways people have made their voices heard in other communities regarding issues they care about.

Unlike traditional study circles, our Circles were designed to build lasting relationships and launch a sustainable advocacy movement, rather than coming to a close at the end of the six meetings.

Circle members received support and coaching from each other, The Lee Institute and members of other Circles. The Circles met six times to complete the core curriculum. By the final meeting, most had determined their focus area, created a "manifesto" that articulates the passion they have for their focus area, and outlined a preliminary work plan. From there, with continued technical assistance from The Lee Institute, they have piloted their own advocacy initiatives. Some members have dropped off, some new members have joined in, and some Circles have combined with others.

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The Community Circle model is one you may find useful to build grassroots energy around topics of local concern. We drew upon the resources provided by the Study Circles Resource Center at www.Everyday-Democracy.org and our past experiences with study circles. Unlike traditional study circles, our Circles were designed to build lasting relationships and launch a sustainable advocacy movement, rather than coming to a close at the end of the six meetings.

With the importance of sustainability in mind, we offer steps for your consideration for the preparation, implementation and transition of Community Circles to independent functioning:

## Ten Steps to Launch Community Circles

1. Develop a curriculum tailored to the needs of your community and the knowledge base of your Circle members, with a detailed guide prepared for the facilitator to follow.

2. Be sure the background data is presented in easy-to-understand charts, diagrams and bullet points. Ask your friends to react to the data presentation before you finalize materials to see if it is user-friendly. This step will save time later.

3. The recruitment and retention of Circle members requires a skilled community organizer with deep roots in the community, a familiarity with the content area, and the ability to motivate and nurture.

4. There are both pros and cons to recruiting Circle members who already know each other. The advantages are that the people already know and trust each other and may be more inclined to continue as a unit after the initial six meetings are finished. The disadvantages are that it limits the opportunity for forging new relationships and may limit the diversity needed for the exploration of multiple experiences and viewpoints.

> Prepare short fact sheets to share with prospective Circle members that clearly define the desired outcomes for the process and the nature of the commitment you are seeking from Circle members.

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5. Each Circle will need a trained facilitator. The community organizer could serve as a facilitator as long as he or she is able to stay neutral. Effective facilitators are able to:

- **Serve the group as a whole**
  Keep the interests of the whole group above those of any individual in the group.

- **Stay neutral**
  Resist interjecting their own viewpoints or judging the comments or contributions of others. The facilitator owns the process, not the content of the group's work.

- **Be fair**
  Keep in mind the need to maintain an even playing field for all participants. Make sure no one person dominates or operates in a way that discourages others from participating. Resolve conflict that may occur within a group with directness and respect, and distinguish between interests and positions.

- **Be flexible**
  While sticking to an agenda and following instructions are important, it is also important to know how to "read" the group and make adjustments in the process in order to suit circumstances in the moment.

- **Create a safe environment for open, honest dialogue**
  A warm, friendly, welcoming, non-judgmental demeanor is important. Be a source of positive energy.

6. Each Circle needs a recorder to capture the 'group memory', especially decisions made by the group and assignments to individuals. Quick turnaround of accurate meeting summaries is an important element in keeping Circle members engaged.

7. We strongly suggest that the facilitator and recorder are paid positions. Even if you are not able to compensate them at market rates, consider offering an honorarium.

8. Use your relationships with existing grassroots community groups to recruit Circle members. If possible, find people who are passionate about their beliefs and have a track record of taking action on what they believe in. It is also a good idea to have some sort of "guarded entry" to the Circles. This could be as simple as asking the recruits to take a survey about why they want to participate. Guarded entry is important because it will weed out those least likely to actually engage in an advocacy effort. This advice comes from Brains On Fire (www.brainsonfire.com) a marketing group with a history of creating word-of-mouth movements in various fields.
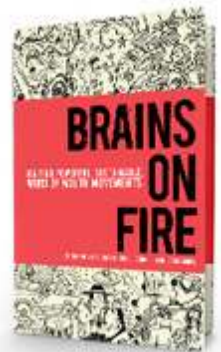
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9. Early in the process, identify a community organization for each Circle that is able to donate space for meetings. A consistent, easily accessible meeting location is worth its weight in gold! Ideally, find organizations that might be willing to provide other in-kind support—even serve as an organizational home—for the Circles after they have completed their six meetings.

10. Allow adequate time for logistics in order to make the meetings as comfortable and seamless as possible for the participants. Close attention to detail such as meeting locations, food, small fun incentives to encourage participation, meeting reminders and written materials show members that you take this process seriously and sets the bar for professionalism for everyone. The facilitator will need supplies such as flip charts, easels, markers and sticky notes in order to lead the group effectively through each meeting's agenda. Staff support behind the scenes is a crucial element to well-functioning Community Circles.

Implementing and Supporting the Circles

1. Set up a feedback loop for the facilitators, recorders, the community organizer and staff support. The hand-offs among these important players must be smooth and without gaps. Brief check-ins before and after each meeting will assure everyone is on the same page and will facilitate the inevitable midstream adjustments when needed.

2. Work with your local school district to identify a liaison who can speak for the school system and who is very familiar with the data the Circle members are learning about. The representative from our school system attended one of the early meetings of each Circle in order to answer questions, dispel rumors, and offer hugely helpful context for the data about school and student performance. While the Circle members learned a great deal from him, he also learned a great deal from them—a valuable exchange and another opportunity for relationship-building!

3. As the Circle members begin to discuss the issues, it becomes more and more important for the facilitator to be sure to give everyone in the group an equal voice. Members do not have to agree with each other; they need to be encouraged to take advantage of the diversity of experiences within the group to gain a full appreciation of concerns and fresh ideas.

4. A rich Circle meeting is one where Circle members display a real curiosity to understand each other's views and learn from one another. These are the building blocks of trust—a necessary ingredient to finding common ground for action and teamwork.

5. We recommend staggered implementation of Community Circles; don't begin all Circles in the same week—or even the same month. It's easy to underestimate the time required to support a successful Circle and you may want to make some adjustments after the first Circles have begun. Consider starting the process in cohorts of three Circles, finishing one cohort before beginning another.

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Implementing Your Own Community Circles

6. Consider having someone check the meeting notes for quality and accuracy. In fact, a second set of eyes on *all* materials for distribution will help to assure getting them right the first time.

Transitioning from a Facilitated Model to Independent Functioning

1. Be clear with the Circles up front about the type and level of support you will be able to offer them after the completion of the initial six meetings. It would be a rare situation where a Circle would have the capacity to implement its advocacy plans after six meetings. While each Circle will be different, anticipate a level of technical assistance and behind-the-scenes support for at least the next several months as Circle members gain first-hand advocacy experience.

2. Facilitators need to work with Circles right from the start to find opportunities for members to take the lead where appropriate. There may be natural leaders within the group who may be able to take on a rotating "co-facilitator" role.

3. In the fifth or sixth meeting, guide the Circle in creating its own statement of identity—its "manifesto". This process caps the initial Circle experience for members and puts a stake in the ground about what they stand for.

4. Find opportunities for each Circle to experience an early "win"—completion of an activity within the first two months after it has completed its core set of six meetings. This might be the Circle's first entry into advocacy and could be something as concrete as letter writing, speaking at a school board meeting or hosting a community forum. This will help maintain momentum.

5. Ask Circle members to record their meeting notes and distribute them to maintain their "group memory" after their initial six meetings.

6. As requests for further data emerge, help to secure the data for the Circle members or find the source. Slowly encourage Circle members to search for their own data to foster independence.

7. Provide Circles with new tools to advance their work as available, both during and after they have completed their initial six meetings. We developed a very practical advocacy manual—a compendium of basic practices and tips—as a reference for Circle members and others they may recruit in their advocacy work. The Advocacy Manual can be found on www.leeinstitute.org.

8. We also engaged The Right Question Project (RQP) (www.rightquestion.org). This training taught Circle members and others how to formulate the questions needed to advocate on behalf of one's own or another person's child, specifically within the setting of school. RQP also trained individuals who were interested in becoming local facilitators of the RQP method.

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9. Convene all of the Circles together from time to time—quarterly has worked for us. You can reserve part of the time during these gatherings for individual Circles to check in with each other, but the main event needs to be something they could not do alone, namely hear first-hand what other Circles are doing, give each other advice, find opportunities for collaboration, and learn something new—such as from an inspiring speaker or a panel of experts. Topics of interest for a speaker or panel to address could include how to think creatively, work with the media or acquire donated goods and services.

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Lessons Learned

What We Picked Up Along the Way

Toward the end of our facilitation of the Community Circles, we conducted a set of one-on-one interviews to check in with Circle members about their experience with The Lee Institute and for their advice to future organizations and individuals considering building an advocacy movement. Each quote below embodies a lesson we learned about developing a theory of change and implementing the Circle advocacy model.

"Sometimes you have to provide something for the entire family, including food and child care, in order to get people to participate."

- Community Circle Member

Scheduling meetings around mealtimes was an effective tool in guaranteeing participation. Meals became a "perk" and motivator. Childcare was a significant barrier to participation for some. We did not arrange for childcare; if we had, it might have made recruitment and retention easier.

"Our Community Circle has had a difficult time finding time to meet. This has been our biggest challenge; it's the very nature of people's lives."

- Community Circle Member

Both the theory of change planning team and Community Circle members struggled with the time commitment in and between meetings. Sensitivity to work and family obligations of all participants is crucial to maintaining involvement. Evening meetings, providing food and offering incentives for participation, such as gift cards, are small ways to show respect for people's time. Even with incentives, expect that some Circle members may be unable to complete the process or continue after the initial meetings. Work and family conflicts are part of life.

"Expectations and structure are really important. Before people commit to something, the expectations of our commitment must be really clear – establish a group covenant."

- Community Circle Member

When we recruited for the first Community Circles, we did not adequately explain the commitment after the initial six meetings. For the second and third cohorts, prospective members were asked to commit to monthly meetings for six months *beyond* the initial six meetings. Communicating long-term expectations in the beginning is a key component to success and sustainability.

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"I've learned through the outline about what we're studying – it was good to have the right/correct information."

– *Community Circle Member*

The Lee Institute laid a solid foundation of information at the onset of both the theory of change and the Community Circles processes. Getting the right data in the room levels the playing field in group discussions. However, when participants did not review the data in advance, the group conversations suffered a bit. The facilitators had to sensitively direct participants to review the information, rather than dismiss it in favor of views long held but not backed by facts. Strong facilitation skills were necessary to help Circle members process the data during the meetings if they had not reviewed it ahead of time.

"An organization cannot take on the entire problem of public education. There are many things that make up the problem. It didn't happen in a day."

- *Community Circle Member*

This wise person is referring to the need for realistic expectations. While the theory of change speaks to big shifts in outcomes for schools and students, change is incremental. Achieve Together succeeds when individuals in the community find productive ways to get their voices heard for what they believe is needed to improve public education especially in lower performing schools. Each voice heard builds public and political will. Success begets success.

"When we had [school system] folks come talk to us, it helped me understand what was not being said in articles I had read. I began to ask more questions instead of accepting things at face value. I learned there are so many layers to what the issues are."

– *Community Circle Member*

While our advocacy development deliberately operated outside of the school system, a partnership with the system was integral to the success of the process. CMS staff participated in the theory of change development, providing key data and valuable contributions to discussions. Creating an atmosphere of trust was key in having authentic and respectful discussions.

During the implementation of Community Circles, the school system assigned a knowledgeable staff person to act as a liaison. For each Circle, he attended part of a designated meeting during the initial six weeks to answer questions. This conversation began a relationship with the system built on trust and honesty. Most Circle members appreciated the openness of the conversation. Once advocacy efforts began, members contacted the liaison to connect efforts with system priorities. This bridge to the system was a small step toward strengthening the connection between the school system bureaucracy and the community and forging community partnerships built on trust and mutual accountability.

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Lessons Learned

> "The ones who stay have been fighting for community for years, haven't given up hope on their community, and/or have a passion inside."
>
> *- Community Circle Member*

This individual is reflecting upon the fact that while some Circle members have pulled away from the advocacy efforts others continue to find energy in this work one year after completion of the first six core meetings. In retrospect, we see that those who have continued with their Circles hold one or more of the following traits:

- They are experienced community advocates in their own right
- They hold onto hope for the revitalization of low-income urban communities
- They passionately believe that their efforts are necessary—and will be effective—to impact community change

This experience underscores the lesson of recruiting people who are passionate about virtually any topic; those are the people most likely to bring sustained energy to this work.

> "If I wanted to move forward and advocate on my own, I feel I've been given enough tools and experience so I could do it on my own."
>
> *- Community Circle Member*

The goal for a community involvement effort like this one is a lasting impact on participants and sustainability beyond the engagement of the sponsoring organization. Building a cadre of grassroots advocates requires commitment across years for both the advocates and the sponsoring organization. Large-scale community change takes time. As you consider launching your advocacy movement, remember how important it is to plan for long-term engagement—at least two years after the Circles are launched. At the same time, plan an exit strategy even prior to recruitment. By creating a process that encourages independence from the onset, participants are more prepared to transition once supports are scaled back or removed.

> "I'm not from Charlotte and don't have kids who went through CMS. So, I thought 'what can I say or bring to the table'? If you bring energy and passion to the issue, you will have a lot to offer."
>
> *- Community Circle Member*

We know that people are concerned about public education. The hindrance to action can be the lack of a vehicle to teach, engage and connect people. Even people who are passionate about an issue may not know how to get their voice heard in a productive way and can be intimidated by the notion that action has to be "large." There are good souls in every community who are willing to step out of their comfort zones, learn new information, and volunteer their time and energy to advocate beyond what is required for their own children. Sometimes all they need is good data, a solid process and a means to come together.

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NOTES . . .

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