



The “Documentation and Evaluation” curriculum was designed by the Participatory Action Research Center for Education Organizing (PARCEO), an independent center that supports the work and organizing of community groups. All of PARCEO’s trainings are based on Participatory Action Research (PAR) and popular education, which value the experience and leadership of those most affected by injustice as we collectively work to affect change and build community power.

This training grew from the needs of many of the participant-led groups we work with that asked for support to envision an evaluation and documentation process rooted in community voices, needs, and expertise. PARCEO hosted an Evaluation and Documentation Seminar that explored ways to document and evaluate work through a framework that draws from personal experience and wisdom to build collective skills, establish shared leadership, and create concrete plans to build sustainable movements and organizations.

The purpose of this training is to provide a foundation for collectively envisioning and building sustainable processes for our work. Often groups are asking: *Is there a way to document our progress that is inclusive and builds collective leadership? Is there a way to evaluate our work and assess goals that is rooted in collective leadership and different needs? Is there a way to navigate limited funding and/or funders that set goals that may not meet the needs of community groups?* “Documentation and Evaluation” addresses some of these questions and provides concrete methodologies rooted in community processes, modeled throughout the two sessions.

In the first session, participants model the ways in which PAR supports a process of planning, setting goals, and documenting that is rooted in the voices and personal experience of community members. Through group discussions, creative expression, and activities, participants practice key PAR principles.



The second session continues to model PAR concepts. Participants collectively explore their definition of success and participatory evaluation models, and how to collectively define success, and create an evaluation plan that meets their needs and realities. This training also has a guide where three community-led groups share their reflections and expertise around documentation and evaluation processes rooted in PAR.

**Goal of this training:** For participants to gain tools and resources for evaluation and documentation processes rooted in the wisdom and knowledge of those involved. Through the training, participants acquire skills to address their specific needs and experiences and develop materials and resources to support their overall work. All of our trainings end with collective reflection, where participants share what they learned from the training and what they hope to continue to explore after the training.

**Objectives:**

- Build participatory documentation and evaluation processes and skills
- Long-term and immediate analysis and reflection of individual and processes
- Collaborative problem-solving to reach collective goals



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## Documentation and Evaluation Training: Session 1 and 2

**Goal for Training:** Participants gain tools and resources for evaluation and documentation processes that are rooted in the wisdom and knowledge of those involved. Participants explore the process of planning, setting goals documenting and collecting information. Participants also define how they view success and create an evaluation processes that meets their needs and reflects their realities.

### Materials:

- Markers and pens
- Butcher block/chart paper
- Post-it notes/note paper
- Overview of PAR Handout
- Running Toolkit with goal setting/planning/documentation practices brainstorm
- Post Training Evaluation Handout

*The Running Toolkit is a piece of paper or spot on the board used to keep track of good ideas and extra resources that come out of the training.*

### Written out on Chart Paper or a Board

- Icebreaker Prompts
- PAR Word Association Game
- Museum Walk Questions
- Setting Goals and Foundations Prompt

*We strongly recommend prewriting all the Guiding Questions on chart paper as well to make it easier for people to respond to the questions.*

## Session 1: Documentation and Collecting Information

(2 hours)

**Goal for Session 1:** Participants explore the process of planning, setting goals documenting and collecting information— processes that are rooted in their experiences, voices, needs and expertise.



## Welcome and Introductions

(15 minutes)

### Introductions (10 min)

**Framing:** **Facilitators** welcome the group, guide introduction, and provide a brief overview of the training. This is a chance to get to know the group and for the group to begin thinking about documentation and evaluation. Participants collectively establish guidelines for how to interact with each other during the session. This supports an inclusive space and mutual respect during the training.

**Action:** **Facilitators** welcome the group, guide introductions, distribute and go through the group agenda, and take questions.

**Talking Points:** Participants go around the room and share:

- Name
- Organization or affiliation to group
- How this training is connected to your work or thought process
- **Icebreaker Prompt:**
  - Do you have a favorite memory?
  - Did you document or capture that memory?
  - How do you remember or refer back to that memory?

### Discussion Guidelines (5 min)

**Action:** **Facilitators** ask participants to brainstorm guidelines for how to engage with each other in this training. **Facilitators** take notes and refer back to the guidelines as needed throughout the training. Guidelines may include agreeing to disagree, confidentiality, respecting each other's ideas and the right to choose not to answer a certain question.

**Connection to the next activity:** Participants explore PAR as a framework for planning documentation and evaluation processes.



## PAR: Word Association Game

(10 minutes)

**Framing:** *This is a warm-up activity to generate conversation and knowledge. There are no right answers in this open discussion.*

**Actions:** **Facilitators** write out the following words and read them one by one as participants “popcorn” share their word associations. **Facilitators** write the responses for everyone to see as they are shared.

|                                       |                                       |   |
|---------------------------------------|---------------------------------------|---|
| Social change<br>Action<br>Evaluation | Research<br>Participatory<br>Planning | Expertise<br>Knowledge<br>Documentation |
|---------------------------------------|---------------------------------------|---|

**Connection to next activity:** *The words from the word association game represent key ideas within PAR, which will be expanded on in the Overview of PAR and throughout the training.*

## Overview of PAR

(10 minutes)

**Framing:** **Facilitators** explicitly define and give an overview of PAR to establish common themes and terms. How participants identify themselves, exploring difference and recognizing commonalities, understanding their own position and intention, and valuing individual stories and experiences while building a foundation for all voices, experiences and perspectives, is all rooted in PAR.

**Action:** **Facilitators** pass out [Overview of PAR Handout](#), see if participants have heard of PAR, give overview and guide short discussion.

**Talking Points:** After passing out handout and giving a brief overview of PAR, **facilitators** introduce the following key concepts:

1. Planning
2. Documentation
3. Evaluation

Share examples of PAR-based evaluation and documentation from the Practitioner's Guide.



**Connection to next activity:** *Participants explore the importance of long-term and short-term planning based on their personal experiences.*

## Who is in the Best Position to Determine a Process to Meet your Goals?

(30 minutes)

### Planning: Facilitator-led brainstorm (15 minutes)

**Framing:** *Participants consider who is in the best position to meet the needs of community members, how one comes to understand the needs of the community, and what this requires. This leads to a process of planning and setting goals rooted in participants' personal experiences.*

**Talking point:** **Facilitators** ask participants to share obstacles that their groups face when setting goals for both long-term and immediate needs, based on **Guiding Questions:**

- a. What is your process for dealing with your group's needs? Why? What is the intention?
- b. What is your process for addressing and attaining your group's goals? Why? What is the intention?
- c. How do you deal with a fast-paced, results-driven and bottom-line environment?
- d. What is your process for building community in this kind of environment?

**Action:** **Facilitators** guide group discussion and introduce the terms: *long-term, intermediate and immediate planning* in relation to a group's process to meet goals. On chart paper, **Facilitators** list examples of short, intermediate and long-term goals based on group discussion.

**Connection to next activity:** *Participants explore how to set goals based on their needs and specific timelines.*

### Setting Goals: Small group activity (10 minutes)

**Framing:** *In small groups, participants discuss the process of setting goals and how this connects with long and short-term planning.*



**Talking Point:** Participants break into small groups for 10 minutes to discuss the **Guiding Questions**, written on chart paper:

- a. How does your group set its goals, considering long-term and/or immediate needs?
- b. How can you plan for the long-term while addressing immediate needs? How can you make sure you stick to your goals? What constitutes an acceptable shift in goals?
- c. Sustainability plans are important in determining goals and planning. What do you need to consider when thinking about sustainability?

**Action:** Participants generate ideas and come up with plans based on small group discussions.

### Reconvene (5 minutes)

**Framing:** After 10 minutes of small group discussion, participants reconvene as a large group to think about sustainability, how to deal with changes in staff, funding and shifts in general.

**Action:** **Facilitators** guide a 5 minute discussion based on identifying needs and developing a sustainability plan even with shifting elements.

**Connection to next activity:** Now that participants have had a chance to explore and reflect on planning and goal-setting, they explore documentation and research processes.

## Collecting and Documenting Information

(30 minutes)

### The Purpose of Documentation – Large group discussion (10 minutes)

**Framing:** Participants explore various methods of documentation based on their experience and needs. Participants think about what they are documenting, for whom, and whose needs are addressed.

**Talking Point:** **Facilitators** ask the **Guiding Questions** and take notes on responses:

1. What is the purpose of collecting information?
2. How does collected information inform or move your work forward?
3. Based on your conversation, what do you document?



**Action:** **Facilitators** list responses clearly on chart paper. This list will be used for the next exercise.

**Connection to next activity:** *Participants use this discussion to plan how to document and conduct research in their own work.*

### Next Steps: How to Document – Small group activity (10 minutes)

**Framing:** *Now that participants have had a chance to explore the process of collecting information and documentation, participants break into small groups and plan documentation processes, related to their work.*

**Talking Point:** **Facilitators** ask participants to think about what documentation processes work for their group.

#### **Guiding Questions:**

1. How do we document our work?
2. What are the different ways we can document our work?
3. How can groups go about collecting and documenting information?

*A few ideas for forms of documentation: stories, video/audio recordings, photographs, notes, creative expressions, interviews, surveys, group discussions, self reflection/reporting.*

**Action:** Participants break into small groups to think about and discuss the questions, generating scenarios and documentation processes together.

**Connection to next activity:** *After thinking about what to document and how to document, participants draw connections between intention, tools and outcome.*

### Visual activity – Small group activity (10 minutes)

**Framing:** *Create connection between the “What to document” and “How to collect and document” exercises.*

**Action:** Participants go around the room and look at the “What to document” and “How to collect and document” lists, creating links between the two exercises. **Facilitators** tease out and provide concrete examples of documentation mechanisms: interviews, suggestion boxes, surveys, meetings, drawings, time-specific check-in, photos and videos, etc. Participants write a list of documentation methods on chart paper.



## Closing

(10 minutes)

**Framing:** *If continuing on to Session 2, skip this and take a break. If ending session and starting new one on another day, this is a chance for participants to reflect on their documentation process, and think about what they would like to explore more in the next session.*

**Action:** Participants share questions, comments and one thing they will take away with them or hope to learn in the next session.

### BREAK or NEXT SESSION

## SESSION 2: Evaluation for and of our Process

(2 hours)

**Goal for session 2:** Participants define success and develop how they view success and create evaluation processes that meet their needs and reflect their realities.

## Evaluation Icebreaker

(10 minutes)

**Framing:** *If reconvening on another day, this is a chance to reconnect with the group and for **facilitators** to get a sense of participants' thoughts and needs. If the group knows each other or proceeds to the second session after a short break, skip introductions and start with the icebreaker prompt.*

**Talking Point:** Participants re-introduce themselves with name, organization, and how they feel about the workshop and its relevance to their work. The whole group goes around and responds to the **Icebreaker prompt:** "Share a time you did something successful in your work or community. What made it successful?"



**Connection to next activity:** *Collectively explore definitions of success through an understanding of evaluation processes.*

## Defining Success

(15 minutes)

**Framing:** *Participants think about the process of evaluating success and how to negotiate different ideas and ideals.*

**Talking Points:** Participants share the history of their organizations, how their projects operate and how they conduct documentation and evaluation processes. **Facilitators** take notes on the group discussion, with **Guiding Questions:**

- What is the history of your project/program/organization?
- What are some of the standards or expectations of your project/program/organization?
- What are some of your expectations or standards for your project/program/organization?
- Is there a connection or disconnection between your group's expectations or standards and your own?

**Connection to next activity:** *Participants have had a chance to reflect on their own project's evaluation process, now they will explore the process of defining success.*

## Museum Walk

(15 minutes)

**Framing:** *Based on their experience and the history of their project/organization, participants consider who shapes and defines the evaluation process.*

**Action:** **Facilitators** post or hang sheets of chart paper around the room, with each of the following questions written. Participants walk around the room and post their thoughts/ideas on sticky notes or write responses under the questions. After the group has had a chance to walk around and post responses to the questions, come back together as a group.

**Facilitators** and participants share and ask follow-up questions, as needed.



- a. Who defines success and how is it defined?
- b. How do concepts of success address the needs of the community group/members?
- c. In what ways do you feel your needs are valued?
- d. Are there times that you are able to reflect with the group? How/when?
- e. How might the definition of success evolve over time?

**Connection to next activity:** *Participants connect their definition of success with the realities of funding and fundraising.*

## Setting Goals and Foundations

(20 minutes)

**Framing:** *Participants explore the realities of fundraising and dealing with foundations in their own work in a small group activity.*

**Action:** **Facilitators** write “How do you negotiate and navigate the group’s goals and the foundation or funder’s goals?” on chart paper or board. Participants break into small groups to address pressures from foundations and fundraising issues, discuss and write their goals or thoughts on chart paper.

**Talking Point:** Participants set goals for fundraising and dealing with funders. Groups discuss how to negotiate and navigate their group or organization’s goals and the goals of the foundation or funders. Each group writes their goals on chart paper.

**Connection to next activity:** *Based on the conversation, participants create links between fundraising, funds, people, needs and goals.*



## Connections between Goals, People and Realities

(20 minutes)

**Framing:** *Participants think about the connections between goals, foundations, people, and needs in creative, mobile, and flexible ways.*

**Talking Point:** Groups look at their chart paper with goals and think about the people, places, and needs they have in relation to their goals. Groups write these other elements and then draw lines between them. **Facilitators** encourage groups to share their webs/maps with the whole group, learning from each other.

**Action:** Based on the “Setting Goals and Foundations” discussion, participants create a web depicting the negotiations among people, needs, and goals, interconnecting the variables to show how they impact each other and have an effect on outcomes.

**Connection to next activity:** *Based on their realities and needs, participants form their own evaluation processes.*

## Conducting Evaluation: Mapping out the Process

(15 minutes)

**Framing:** *Now that groups have established their goals and needs, participants explore ways that this can form an evaluation process rooted in their experience and expertise.*

**Talking point:** **Facilitators** guide group discussion with the **Guiding Questions:**

- Who is part of the evaluation process?
- What do they hope to achieve? What do you hope to achieve?
- What is the purpose of evaluating our work?

**Action:** Depict this process visually as a drawing or chart or a list, showing intention, action and follow-up action. This is something groups take with them to help initiate participant-centered evaluation processes in their programs.



**Connection to next activity:** *Considering our intentions, definitions of success, and all of the elements that are part of our documentation and evaluation plan, we start to integrate timelines and other logistics into this process.*

## Tying it all Together

(10 minutes)

**Framing:** *Given our realities and how we define success and can create evaluation processes that meet our needs, we discuss how often we should engage in this process and what is needed to ensure a sustainable plan.*

**Action:** **Facilitators** guide discussion on how often to conduct evaluations and how to stay connected to these intentions. Participants leave with their own lists to be used as guides as they plan their documentation and evaluation processes.

## Closing and Reflections

(15 minutes)

**Framing:** *A chance to reflect, evaluate and think about this session and how to move forward.*

**Talking Point:** **Facilitators** ask **Guiding Questions:**

- What is one thing you will take away from today?
- What is one thing you would like to continue to explore?

**Action:** **Facilitators** lead group brainstorm on how to practice documentation and conduct evaluations and share additional resources. Participants leave with their own/group lists/webs to be used as guides as they plan. After group reflection and conversation, ask participants to fill out a [Post Training Evaluation Sheet](#) for this workshop.



# Agenda

## Session 1

- Welcome and Introductions
- Overview of PAR
- Who determines evaluation methods?
- Collecting and Documenting Info
- Closing

## Session 2

- Defining Success
- Setting Goals and Foundations
- Connections between Goals, People and Realities
- Conducting Evaluations
- Closing and Reflections

## Additional Resources

### 1) Attached Reflection Guide

### 2) Participatory Evaluation Essentials

<http://www.healthincommon.ca/wp-content/uploads/participatory-evaluation-essentials-for-non-profit-organizations-and-their-evaluation-partners.pdf>

### 3) Innovation Network: Transforming Evaluation for Social Change

Free Resource Library

<http://www.innonet.org/resources/>





## What is PAR?

**Participatory Action Research (PAR)** is a framework for engaging in research and organizing for social justice that is rooted in a community's own knowledge, wisdom, and experience. PAR recognizes that those most impacted by systemic injustice are in the best position to understand and analyze their needs and challenges and to organize for social change.

In a PAR-generated process:

The outcomes can **take many shapes** and forms depending on what the group determines together, but it is the group's own agenda and not someone else's.

We engage in **collective research and organizing** to build community and make change.

The work is about **generating and building knowledge together** in order to define the change we seek to make. This begins with telling our own stories, which centers our own experiences.

**Community members are recognized as experts**, and all participants are considered both teachers and learners. Too often, outside "experts" come in to identify and address a community's problems, and PAR challenges this notion of who has the expertise.

We work intentionally and always think carefully about **whose voices are being heard, who is making decisions, and how we are moving forward**. We consider our roles, position, and privilege in relation to changing conditions of injustice.

Like popular education, it is a broad framework that is **participatory, collective, critical, and reflective**, building from the work of Orlando Fals-Borda, Paulo Freire, and many others. It is not a neutral process and actively builds community strength and leadership to change unjust conditions.



Evaluation for ***Evaluation and Documentation Training***

*Please return to PARCEO via email within 2 weeks of completing the training*

1. Share with us a little bit about your group—general focus/interest, geographic location, size of group, general demographics.

2. In what ways do you think this training will influence your future work?

3. What aspects of the training did you find most useful?

4. What suggestion do you have for improving the training?

5. What is one thing you're taking away from this training?

6. Would you be interested in other trainings? If so, on what topics or issues?



## REFLECTIONS

This guide grew out of a three-year process, which involved gathering reflections on the process of documentation and evaluation from several community groups whose work is grounded in PAR principles. The reflections were written collectively by members from The Parent Leadership Project, La Union, and the Beacon High School Diversity Group.

### Parent Leadership Project

The Parent Leadership Project (PLP) is a popular education-based organizing project. PLP works for justice in public schools. PLP grew out of over a decade of collaboration between the Center for Immigrant Families and the Bloomingdale Family Program. In 2010, the two organizations decided to combine their efforts to address the reality of segregated and unequal public schools in District 3. PLP builds parent leadership, power, and organizing for educational justice in District 3 schools and beyond.

## DOCUMENTATION

### **Setting Goals: Long-term planning**

Whether it is fighting for educational justice, or workers' rights, we at PLP are so used to having to confront and focus on what it is we are up against. While this offers insight into what the issues are in our communities, we believe it is essential to envision what we want and what it is that we are fighting for. Having a collective vision of what we want provides a goal, something tangible that a community can work towards.

The Parent Leadership Project (PLP) works around issues of access and equity in public schools. We have weekly workshops with our parents in which we have different themes and rights sessions that we cover. Every session has a story-sharing component integrated where parents can share their experiences and connect with one another. We also have our district wide work where we engage the larger community school district.

At the beginning of the year, we plan out our sessions for the upcoming year by establishing themes and rights sessions as well as build on existing curriculum for sessions we've already covered in previous years. We use this time for reflecting on past year successes and lessons learned, as well as clarifying our vision of what we're working towards: a policy change in admissions that is rooted in equitable access and building community power among low income families of color. We set short-term goals and long-term goals while integrating the circumstances and needs of our parents transitioning to public schools each year. Through our workshops and planning sessions, we develop and build consensus on strategies to reach our goals. The foundation of our work is rooted in parents' stories and experiences--when



collectively shared, systemic issues begin to surface.

The goals we establish in the present are built off of work and goals established the years before. As parents share the various challenges and obstacles they face as they try to enter the public school system, our advocacy strategies are shaped. Immediate needs of our parents frequently shape our sessions and also help inform our goals for the following year.

This is an organic process—PLP cannot establish goals without the foundation of parents' voices and experiences. Our efforts would be for naught if we ignored the harsh realities low income families of color face in segregated conditions that play out with real life consequences in their day-to-day lives. This informs how we establish a realistic number for our core group of members; how we do outreach; how we build membership capacity and community once a core has been established and solidified; how we build on the wisdom, expertise and leadership of our members; how we facilitate our sessions; how to stay connected once members graduate at the end of the year; and how we integrate members into the larger work around the policy change.

Each year, as more and more parents share stories of severe discrimination and lack of access to accurate information and public schools in general as they learn about schools, the more difficult and intense our advocacy efforts become. These personal stories drive PLP to achieving our global goals of changing the systemic realities of segregated schools (dismantle segregation) and to ensure all low-income and parents of color have access to schools of their choice. Since the days of CIF there has been powerful movement toward that goal—to continue to bring awareness to of these issues and to develop organizational strategies toward achieving an equitable and fair admissions policy.

### **Collecting and Documenting Information**

We think critically about how we gather information and how we determine collectively what information is worth collecting. It is important to us that the information we collect is informed by parents' experiences in our membership. The power of sharing our personal experiences and knowledge and collectively threading our stories and themes to the systemic nature of discrimination in our public schools has made our research and community strong. Issues are identified and information is generated within PLP's membership through parents collectively sharing their experiences and understanding of what is going on in the District. When parents realize that they are not the only ones facing discrimination by the public schools in the district, they begin to thread the commonalities of exclusion they experience and link it to the systemic nature of our current admissions policy. Together, they come up with strategies on how best to raise visibility of their stories as well as help shape our current work around pushing for an equitable student assignment plan.

In terms of documenting this process, perhaps this is an area that could be enhanced and developed. The individual stories and comments generated throughout the year that



empowers PLP to move forward to change the circumstances for our parents – are powerful and should be documented. However, how we choose to go about documenting and collecting more stories is important because the process will shape what stories are included or excluded. It is also important to document how the group comes together in a trusting, cohesive and supportive way.

It is important in our work to share and rotate the responsibilities and roles amongst the group. Facilitating may have a different intention or purpose from someone who is documenting the stories being shared but both roles require one's full attention. For the past year, we have built in sessions where facilitation has been shared amongst the group, and we've documented stories together, where at least two members have coordinated that specific area of work. So last year, parents developed a PLP pamphlet that highlighted who we are, what we're fighting for, some of our stories of exclusion and how to be in touch with us. The year before, we had a forum where we shared our stories of exclusion with the larger community. This year, we're currently figuring out together an art-based medium that would capture our stories individually (who am I) and collectively (who we are as PLP).

## EVALUATION

### Thinking about Evaluation

Our organizing, and campaigns that emerge, grow out of our community workshops and process of reflection and analysis. As a result of that process, our organizing is largely around the issue of justice in public education, more specifically: challenging an increasingly segregated and unequal system; fighting lack of access to our PUBLIC schools; and keeping our public schools PUBLIC.

The nature of our work is constantly changing, with many systemic obstacles that make it difficult to navigate our advocacy efforts. It has been really helpful for us at PLP to meet regularly to discuss our long term planning. During this time we are able to collectively flesh out our strategies. What makes this extremely helpful is that we use our original timeline as a guide, with an understanding that many things we planned to do earlier in the year may not happen, or may change. Brainstorming together on how to deal with these changes often evolves our goals and makes obstacles seem less daunting. Even though the nature of grassroots organizing that's truly rooted in community is difficult and frustrating to navigate, being able to embrace and adapt to change has made this process less difficult.

The challenges or tensions seem to fall into two general areas when it comes to evaluation—the understanding of what constitutes a process of "evaluation" and what is considered "success." Since our work is rooted in a PAR-framework and the foundation is built from members' own experiences, the psychological/emotional conditions and experiences that impact the community—as well as the consequences of those conditions and experiences—are critical to our work. But we have found that the psychological impact (of a particular injustice) often gets regarded as a distraction or as superfluous and so any change that takes



place (psychologically) as part of the organizing process is typically ignored in the evaluation process, not by us, but by those funding our work. The issue of evaluation with funders is difficult, not only because of the inability to quantify the psychological changes, but we have found that funders too often don't even consider these important changes as part of the evaluation equation.

### **Conducting Evaluation**

At PLP, we think about evaluation similarly to how we think about documentation: what makes sense for our work, and how can we integrate an evaluation process that strengthens and moves our work forward? Documentation and evaluation are not separate from our work, but rather fundamental parts that we as members and organizers think about constantly. As a group, we have much on our plate, and even though we are thinking and reflecting on how we integrate documentation and evaluation into our work plan, it is difficult to do so with time and resource constraints.

At the end of each year, however, we have reflected our year together, evaluating what we did, what we didn't do, what changed, why, and what are our successes and what are lessons learned. We have not yet brought in "outsiders" and would decide as a group if and when that would be appropriate.

### **Setting Goals and dealing with Foundations**

The different perspectives on what is worth evaluating that some funders have versus what we see as worth evaluating is also connected to the discrepancy we've experienced at times (between us and funders) in our understanding of what is "organizing" and where, for example, that process of what we define as "organizing" begins and ends. This also relates to our belief in the importance of looking at the ways members change (as part of a transformative process) in many different ways, looking at the strength of the community that gets built, that is, looking at internal development (vs. obvious external impacts). Often, these things aren't looked at as outcomes or measures of success (though, again, they are to us). For example, the community built during our project to challenge segregation was so strong and sustainable-- it seemed to us that funders typically evaluated us as successful because we got a policy change, but not as a result of those changes in how people saw themselves and how a community would forever be different in its own sense of power and worth.

Now, although we represent PLP parents, we know they are part of a larger number of parents who are experiencing the same issues. Perhaps capturing how these issues systematically affect and infect the well being of the educational process would illuminate this issue to foundations. Again, somehow, the story collecting needs to be expanded. Presently, Campaign For Children is collecting stories from parents and programs citywide in regard to how they are affected by the current change in childcare in the city. This is reminiscent of CIF's/PLP's work and how their work brought awareness to the community, the district and to foundations.



A challenge for us is the need to critically examine assumptions that are being made by both outsiders and insiders--otherwise; evaluation might end up being based on something we don't agree with. For example, let's look at the question of what makes a school good. In our school district, a school is typically only considered good if it has a certain percentage of white and upper income families (and, along with that, particular test scores). But who is determining what makes a good school? There are assumptions made about how many white and middle class families you need in a school to make that school considered good. It is these assumptions that must be made both transparent, and, when needed, challenged, if, eventually, a meaningful evaluation process can take place. We need a model that is really about people. Evaluation has to align to the vision, the mission of the group, etc. and that makes sense of our own processes and values so different organizations require different forms of evaluation. Finally, it is important to recognize that certain aspects may take more time. For example, collectives (such as CIF/PLP) need strong internal structures--they need time to develop in a way that is different than the common hierarchy structure. This requires a different way of thinking and perhaps a different process of evaluation.

### **Success**

PLP believes in order to be successful in this work, there needs to be community power, and a collective vision of change has to be rooted in community. A policy change without community power cannot and will not be sustainable -- it will be missing the most crucial factor-- the knowledge, wisdom and leadership of those most impacted by segregated and unequal school systems. The power of sharing our personal experiences builds relationships and forms a community like no other. PLP has at its foundation values of love, friendship, respect and trust. This is reflected in how we structure roles, leadership, participation, facilitation, and areas of work. We define something as a success if it reflects a transformational process for both the staff/leadership and the whole community. If the horror stories in regard to PLP parents not gaining access to schools lessen or increase each year – this could be part of the evaluation process and whether the work being done is effective.

The continued weekly presence of the core group of parents who seem to be more aware at each meeting of the challenges they face as low income families entering the school system – feels successful. It is apparent by their involvement and support of each other that PLP is making a positive impact at least in awareness of the issues. Bringing awareness is the first “brick” in building a foundation. Parents are more aware and together they feel empowered to change the negative climate they are experiencing. This is one of the goals that have been successful.

We are able to look at the work we've done in a formative way because we intentionally built reflection into our work plan. This way we have a historical view of our project, where we are able to see the evolution of our goals, successes, and situations we can learn from. We do this because there are many systemic forces that push back our efforts and often put us in a place where we have to be very reactionary.



This push back forces our strategies and goals to evolve. This isn't necessarily a bad thing, to be able to adapt to the ever-changing circumstances that come with organizing for social change. Because our work requires this flexibility, so does our definition of success. One thing that will not be disputed is how fundamental it is to take the time build a strong foundation of community power and leadership, as well as building capacity within the group. Without this, none of our goals can be achieved, and whatever we define as success becomes irrelevant, because the only way to be successful, however you define it, requires this foundation of community.

## La Union

La Unión is a community organization composed of new immigrants living in the Sunset Park neighborhood of Brooklyn, New York that works to advance the social, economic, and cultural rights of the communities where we now live and the communities we left behind. A large part of La Unión's work focuses on improving public education for immigrant families through parent and student organizing.

## DOCUMENTATION

### **Setting Goals: Long-term planning**

At La Union, we feel that we live in a society that places great importance in achieving rapid results. Communities of color often experience a range of dire needs and in low-income communities it's common to find organizations and agencies whose mission is to respond to pressing immediate needs, reinforcing the "demand" for services that relieve the symptoms of an oppressive system instead of developing and nurturing the conditions under which people can unite to work for long-term transformations. Our collective seeks to sustain a community space where we never lose sight of the fact that our dream for a just, democratic, life-sustaining society may take longer than we would want but will surely grow as the result of our transformational, persistent, movement-building work. We keep alive the flame of desire in us for the best schools, neighborhood, society we can imagine while at the same time build change step-by-step, starting with ourselves and planting and nurturing the seeds of change in wider and deeper ways around us. As a bridge between our long-term aspirations and reality, we need community planning. Planning collectively might take longer and require that we develop a lot of skills in the process, but it's the only way to ensure that it is the community who is formulating and setting the ways to achieve the goals, and being the agents of such process.

The community should be part of developing the goals and a common plan, which can be a long process. It requires meeting every week and getting to know each other through the histories, stories, and needs of the parents. Our goals are determined by learning about the needs of the community. This can be done by visiting schools, having conversations with other



parents, and learning from one another. Achieving the ultimate goals we set out is a long-term process, and in this nature of our work, our deadlines have to be flexible. Before we can even start this process, it's essential to build a strong foundation of community and explore the "wants" together. At La Union we do struggle with the tensions between long term planning and addressing immediate needs. An important question for us to consider is: how does one think about striving towards long term goals while addressing the needs as they come up?

### **Collecting and Documenting Information**

As a collective seeking to build a community self-organized to work for social, economic and cultural justice, the question of—what goals are we pursuing and how we are pursuing them—is the most important one. At La Union, we are convinced that the means justify the ends.

Another important question is how we are going to monitor if we are making progress towards meeting our goals and to document the process in which we engage as we do so. Sometimes there are circumstances or variables that impact the work we are doing and that favor or impede the achievement of the goals we set out to reach. It is equally important to learn and adjust from these experiences and let them re-orient our courses as we move forward in our projects. Clear documentation allows us to learn from this from this re-orientation process.

Documenting our process as a collective allows us to be aware of the movements and their meanings, to treasure the strengths and good choices and courses of action while we also learn from the obstacles, shortcomings, and failures in order to carry out a deeper and wiser work. Our interactions and commitment to La Union—to its vision and mission, to its philosophy and action—is a commitment to the self-determination of a community that is being built in a democratic process and that asking for input and seeking to incorporate as many voices as possible given that "solo entre todos lo sabemos todo." (Only between all of us do we know everything) Therefore other crucial questions when considering goals, documentation, and planning are: Are we always asking questions and LISTENING for the answers? Are we open to new "saberes" (ways of knowing) and to embrace diverse points of view and approaches to enlighten our realities and to find creative COMMUNITY solutions to our struggles?

At La Union there are several challenges we have with documentation. We seem to be more action-oriented rather than focusing on how we document our work because of the many things happening in our community that make our actions more reactive than proactive. There is the issue with having time to document or even coming up with a documentation process and seeing how the work has evolved. The past year, we tried having parents documenting their experiences that they kept in individual folders and through agendas and meeting minutes. Though helpful, sometimes the notes did not reflect a holistic perspective of what was discussed at the meeting, and sometimes the meeting place did not allow for an ideal note-taking environment, like at the cafe.



We also have used photography as a documentation mechanism and community tool. This is dependent on what makes sense for us and what meets our needs. Our members have been integral in this process of deciding together who is responsible for collecting and documenting and what mechanism is appropriate for our work.

Our members have varying skills, which sometimes created a difficulty in their personal note taking and documentation. Specifically, it may have been easier to have someone record and then transcribe members' experiences rather than having members write them. One way that has made note taking easier is writing on a big piece of chart paper during a meeting, and then having those notes typed up and sent out later. This way of note taking allowed members to participate in the discussion.

## EVALUATION

### Thinking about Evaluation

We are constantly evaluating through education, information, and collaboration. Questions we think about at La Union when it comes to evaluating our work are: What are we even evaluating? Is it only the goals that have been achieved, or are we evaluating our process? What is our ultimate long-term goal? What defines our success? How we answer these questions and define success should come from the community.

This is a strenuous and piecemeal process, for as the needs of our community members evolve and new issues within our children's schools arise, it is important for us to remain flexible in our capacity to include and address these in our goals and work. As we are continually striving to involve more parents in our organizing efforts, we must value the experiences and knowledge they bring to bear, and engage them too in thinking about what makes us as successful in our endeavors and the most relevant processes for evaluating that. Our evaluation process must therefore be ongoing, adaptive, participatory, and reflective.

### Success

When we think about how we define success, we are really asking, how do we know we did a good job? We define success collectively by evaluating to what extent we have attained the following: collectively created a community that values learning, appreciated different perspectives, communicated with each other better, and engaged others in the community. We build the internal foundation of this together, little by little. In creating this community together, do we see a change in how we think about these issues affecting our community? Are we prepared? We should be able to see the history of our work/project and how it is evolving.

Using the particular example of our "eventos en casa" (in house events), we have dedicated a significant portion of our weekly planning meetings to reflecting upon what worked well and how the events and our outreach efforts could be improved upon. We have measured our success not only by the number of new parents that come to each event, but also the number



of new parents that then begin to attend our regular meetings. We are constantly asking ourselves what we can do to increase both, drawing from our individual and collective resources to find new ways to promote our work and to attract greater participation from new members. We work through these questions together, actively sharing the thoughts, ideas, and opinions of each individual present. When new members take part in this process, this is an especially important part of our evaluation. It is an exciting opportunity for us to experience a fresh perspective. Moreover, it is valuable for helping us to evolve our work in new ways – ones we might never conceive of if we only listened to the same voices.

Our success then is not necessarily defined in measurable outcomes, but in our ability to grow and sustain a community in which all members feel meaningfully engaged, in which their needs, their experiences, and their expertise are valued and reflected in the goals we set and the continued work we do.

### **Setting Goals and Dealing with Foundations**

What happens if foundations do not agree with our goals or wants? Or our missions do not align? We, as a group, have to decide the avenues and strategies to achieve the goals we set out. Each avenue or strategy plays a different role in how we reach our ultimate goal. We also think about, how can evaluation be integrated in this process, and when and how often we should evaluate? It is important for us to consider what are the roles of the organizer and how do we find a balance of power so that parents and organizers can share their opinions, but in a way that values all voices and perspectives.

### **Conducting Evaluation**

When do we bring in an “outsider”? This is decided by the group and always with everyone’s knowledge and agreement. Honesty, clarity, and a sense of comfort are needed when outsiders are brought in. It makes sense to bring in someone who is experienced and familiar with our work and can bring valuable perspectives. Also, the evaluator and the group should be open to new perspectives and knowledge.

In some cases, it is perhaps more difficult to define precisely what qualifies someone as an “insider” versus an “outsider. As we explore and engage with the diverse issues arising from our experiences in our children’s schools, there are many occasions in which meaningful collaboration can occur. For example, if we want to expand our formal knowledge of a specific school policy, it is helpful to bring in someone who can contribute to our research in a way that reflects and builds upon the experiences and existing knowledge of our members. It is possible that this individual or group will initially appear to qualify as having “outsider” status, however, if they truly respect who we are and what it is we are trying to accomplish and engage in that process in an ongoing way, then that individual or group eventually becomes an intentional part of our community.



## Beacon High School

Two young organizers from the diversity group in Beacon High school worked as part of a group towards challenging the admissions policy that focused on standardized tests. What initially had been a school that valued access and diversity became an elite institution that had very few “feeder” middle schools from which students entered. The diversity group conducted a PAR project to address the issues in the admissions policy and organized to make changes. Both organizers, now college students, reflect on their past work and process in the diversity group.

### DOCUMENTATION

#### **Setting Goals: Long-term planning**

It is particularly difficult to write about the experiences with the Diversity group at Beacon because it feels as though everything has exceptions, different perspectives, and both benefits and weaknesses. Our involvement helped us grow in countless ways, many of which are only being discovered now, and we will continue to learn from these experiences. With that said, writing about this topic is incredibly helpful in understanding our process.

Our Diversity group at Beacon had trouble with long term planning. We knew we wanted to change the admissions policy, but the ways to do that were somewhat unclear. We wanted to be able to work with the administration to develop a new policy but they were not open to that. When we came to them with ideas for what a new policy would look like, they accused us of demanding things. It was all very intimidating. We were quickly seen as wanting to take down the school. This was probably because we had published the statistics of Beacon’s changing racial demographics. These statistics came across to the white students as threatening their lovely liberal bubble, which made them very defensive. It is possible that we focused so much on what Beacon had become (and was), as opposed to what we wanted it to be, that we got stuck in a rut. Our group would have done better if we had drafted an alternative admission policy collectively to present to the administration. We did have demands!

#### **The Process:**

It is hard to identify our process, because we never had a set course of actions that we truly followed. Our tactics were constantly changing (and being changed for us by outside forces). We did however, stay true to rooting our work in students’ stories of exclusion and isolation at Beacon. Whatever outcome we eventually ended up at, the process was one of gathering experiences together. What changed was how we used them.

We had meetings nearly every week where we talked about segregation. There were times where our meetings did not feel “productive” because they were not spent planning. They



were however, a place for people to share their experiences. This was a difficult and important aspect of our work. These weekly meetings solidified that everyone in our group was on the same page. There was never internal tension about people having different views on the issue. However, this presented a challenge because our approaches for addressing the administration were largely dictated by their volatile attitudes.

For example, when we put up posters around the school about Beacon's undeniable statistics, the administration was able to take them down because we were not an official club. We then tried to become an official club with the mission of doing outreach to middle school students. We agreed outreach was something that was lacking at Beacon. Students of color often said during our meetings how they were the only students from their middle school to attend Beacon and many of their peers did not even know it existed. White students from feeder middle schools came in droves. The pressure from our administration forced us to change our strategy, but our process of using students' experiences to identify what needed to be addressed remained. Together, we recognized that outreach was one aspect of the segregation we were fighting and starting a club at Beacon was a way we could address it.

### **Collecting and Documenting Information**

It is important to have a diverse collection of information. It is important to know what the information is, how it is presented in and whom it is presented to. For example, when working with others to change the admission policy at Beacon High school, we put up posters throughout the school. At first, these posters had data about the school shifting to a predominantly white environment. The posters asked why this happened, and also had information about future meetings. It was important to us to present data and facts to gain credibility. We quickly learned that this approach did not go over well with our school community. It may have been more effective to begin with some theater of the oppressed skits on the block of our school, to introduce students to the segregation issue through people's stories and more tactically, to approach students with personal stories and save the cold hard facts for our already perturbed administration.

## **EVALUATION**

### **Thinking about Evaluation**

It is important for an evaluation process to be discussed at the beginning. In terms of the work with Beacon's admissions policy there was no discussion of an evaluation process. It often felt uncomfortable discussing feelings people had within the group about delegating work because there was no established way to do so.

Our group at Beacon faced challenges both internally and externally. Internally, our meetings would have benefited from greater facilitation, maybe even from an outsider. There was a definite sense of experts vs. juvenile organizers in the group, which could have been mediated more smoothly with an experienced facilitator.



Another challenge we faced was not being taken seriously by our administration and peers. The administration quickly discredited us to because of our age. They referred to us in front of our peers as “deceitful kids” without considering the impact that had on us. This stigma prevented other students from joining our group or even opening their minds to our valid positions.

The diversity group built community in a meaningful way that allowed for friendships to develop. This made the foundation of our organizing stronger. One of the things that we could have done was collectively crafted an alternative equitable admissions policy that we envisioned, and presented it to the administration. If they accused us of demanding things, we could have responded with the backing of respected academics and community members that we were indeed demanding things like equality, justice and fairness. Although so often our age worked against us, we could have turned it around by taking ownership of our ability to be visionary.

### **Success**

There two aspects that weave through one another to measure success in a PAR framework. First, the community group needs to reflect together on their organizing methods. Are there uncomfortable and unfair power dynamics? Do group dynamics reflect the dynamics we wish to create structurally? Then, the group would need to reflect on their goals and actual achievements. What structural changes would they need to make in order to feel successful? For example, the working group fighting against segregation in Beacon was a diverse one. Our group reflected the diversity we wanted to see in the NYC public schools. Although we were not “successful” in changing structural issue, we were successful in creating a community for ourselves that we felt was needed. One success cannot truly and fully be achieved without the other. In the case of Beacon, segregation could only be fought by creating equitable access.

When thinking about success in terms of the diversity group, for a long time we were measuring success by how much we could get through to the administration and change the admissions policy. At one point we saw that after two years our efforts made some kind of impact when there was an increase in students of color in the incoming class. Towards the end, the group saw success by how relationships were built in the process of the organizing we were doing. The group also held two forums which both had great turnout, one with media present. This helped the group gain some attention, which started forms of discussion. This also felt like a success for the group.

### **Setting Goals and Dealing with Foundations**

We were not able to work within Beacon as a club, which would have given us access to more students, the ability to put up more flyers, and a classroom to meet in. When we saw that our rights as a group were being restricted, or that there were certain rules that applied, we stopped trying to work inside the school and remained an outside group.



Through our experience, we realized groups and organizations must be honest with their ambitions and although some foundations may have helpful resources, it is not worth it to change the organization's goals in order to receive these resources. The organization's original goals were most likely crafted without any financial influence or pressure, and therefore are the most honest, and should remain that way! An alternative is to compromise, by acknowledging the group needs resources, reaching out to other community groups who have similar goals. Groups can exchange their resources with one another and build solidarity be among their members. It is important to look for resources, not only monetary ones outside of foundations.

### **Conducting Evaluation**

Outsiders should be brought into an organization if they have had experience in the type of work that the organization has been part of/wants to have a better understanding of the group. It is important for groups to be at the center of determining what is needed when outsiders offer assistance, to help, rather than to hurt. We think PARCEO is an example of an 'outsider' that can be a helpful entity to organizations. In terms of the Beacon diversity group, it would have been helpful to have a center like PARCEO give a PAR training to the group.

