LOCAL LEARNING PARTNERSHIP
GUIDEBOOK

Making Connections
THE ANNIE E. CASEY FOUNDATION

Acknowledgements

Explanation of Symbols

Throughout this Guidebook, a set of symbols is used to easily identify features that may be of particular interest or importance to readers.

DEFINITION

EXPECTED RESULTS

WHY

p. xx CROSS REFERENCE

Contact Information

The Annie E. Casey Foundation
701 St. Paul Street
Baltimore, Maryland 21202
Phone: 410.547.6600
Fax: 410.547.6624
www.aecf.org

TABLE OF CONTENTS

LIST OF FIGURES

LIST OF TABLES

FOREWORD

Local Learning Partnerships (LLPs) are nontraditional coalitions of data users, providers and analysts created as part of the Annie E. Casey Foundation's *Making Connections* initiative. They were developed as part of the structure for *Making Connections*, because of the Foundation's commitment to using a data-driven agenda for improving child and family outcomes. The Foundation has a long-standing belief in the power of strategic use of data and in continuous learning as tools for achieving good outcomes.

This Guidebook is being prepared at a time of transition in, and ramping up of, the role of Local Learning Partnerships. In the first phase of *Making Connections*, LLPs focused on building capacity for neighborhood-level data collection and use. Now that *Making Connections* has strengthened its original focus on changing outcomes for children, families, and neighborhoods, LLPs need to focus on their role in supporting data and learning activities that help produce and sustain results in the initiative.

This Guidebook attempts to help bridge this transition, by providing information and tools related to the data-focused activities. It tries to do so by placing data activities in the context of local *Making Connections* work in order to illustrate how they are essential to getting to results and how to communicate about results.

The Foundation began its *Making Connections* initiative in 1999, as the centerpiece of a decade-long commitment to improving the life chances of vulnerable children by helping to strengthen their families and neighborhoods.

Making Connections began with a developmental period (called Phase 1) in 22 cities to determine the levels of local enthusiasm, leadership, investment, and commitment present to support a long-term family strengthening initiative through neighborhood transformation. In early 2002, *Making Connections* began emphasizing more structured roles, expectations, and attention to results.

LLPS ARE ENTITIES CREATED TO EMPHASIZE THE IMPORTANCE OF DATA AND LEARNING IN A FAMILY STRENGTHENING INITIATIVE

THIS GUIDEBOOK CAN BRIDGE THE TRANSITION FROM GENERAL DATA-RELATED ACTIVITIES TO AN EMPHASIS ON USING DATA TO SUPPORT PRODUCING AND MEASURING RESULTS

During the Phase 1 years, each Local Learning Partnership focused — in differing degrees — on building capacity for activities that the Foundation defined as priorities:

» Using data strategically

» Developing a "data warehouse"

» Collecting qualitative data

» Recording the process of change in the site

As noted above, because *Making Connections* in Phase 2 is now concentrating more on evaluation, LLPs need to adapt their activities to generate, measure and communicate results. Local Learning Partnerships now must apply the capacity they have developed to a local self-evaluation and to the cross-site evaluation of *Making Connections*. Engaging residents and building a community of learning remain priorities that underlie all activities.

This renewed emphasis has created new roles and opportunities for LLPs and for the staff within the Foundation who work with them. It has also created strains on workloads and relationships, and caused both Foundation staff and LLP members to assess their current capacity and competency to meet the more demanding requirements of the results process. LLPs now have both the opportunity and responsibility to ensure that local *Making Connections* efforts use data effectively.

On the other hand, the push to define results has created a stronger framework, context and clarity for the work of Local Learning Partnerships. It has helped define the roles played by LLPs in the work of each site, how they interact with the Foundation, and how their activities contribute to the *Making Connections* goals.

Although the information contained here would have better informed LLP work in Phase 1, this Guidebook could not have been written before now. As a new model of supporting local community change efforts, LLPs had the latitude to begin development in creative ways unique to each site. This Guidebook attempts to observe and draw upon this richer pool of experience and knowledge built by the LLPs and the Foundation.

WHO IS THIS GUIDEBOOK FOR?

All Local Learning Partnership members may find this Guidebook helpful, given the results-focused context in which their work is now occurring. We hope it will assist in sharpening and shaping existing activities to respond better to our increased collective attention to results. It may also provide new ideas or perspectives on existing or planned work — and respond to a common request of LLP members to simply know what their peers are doing. The Guidebook may be particularly helpful to newer members of LLPs or members who have not been deeply involved in understanding the complex roles and responsibilities of LLPs.

In addition, this Guidebook can serve as a valuable resource for *Making Connections* site team members as it describes the role and functions of LLPs within the context of *Making Connections* work. It is also our hope that others beyond *Making Connections* sites and the Annie E. Casey Foundation benefit from shared learning about this unique effort that emphasizes resident-involved partnerships concerned with strategic use of information as part of a family strengthening movement.

While this Guidebook aims to help bridge the transition from LLPs' developmental stage to their new responsibilities within a results framework, there are likely to be further evolutions in the role of Local Learning Partnerships. In part, those evolutions will follow from the insights and lessons developed through a learning community of neighborhood residents, neighborhood partners, LLPs across the country, and Foundation staff. LLPs will stimulate and participate in that learning community.

GUIDEBOOK MAY HELP ASSIST TRANSITION TO RESULTS-FOCUSED CONTEXT FOR DATA WORK

GUIDEBOOK MAY BE A RESOURCE FOR OTHERS WITHIN AND BEYOND *MAKING CONNECTIONS*

Finally, the Foundation, especially the Evaluation Liaisons, would like to recognize the creativity, patience, and vast amounts of time and effort of the LLPs in doing the work on the ground. These efforts will strengthen the relationship between "program" and "evaluation" and ensure that learning happens and that data are both used and useful. We also want to acknowledge Nancy Ashley of Heliotrope, who skillfully integrated the different perspectives and voices of Foundation staff and LLPs into this Guidebook.

TONY CIPOLLONE

Vice President
Measurement, Evaluation & Advocacy
Annie E. Casey Foundation

AUDREY JORDAN

Senior Research Associate
Annie E. Casey Foundation

THOMAS KELLY

Senior Research Associate
Annie E. Casey Foundation

CHAPTER 1: INTRODUCTION

QUICK OVERVIEW

Making Connections is a long-term initiative of the Annie E. Casey Foundation to spark transformation in families, neighborhoods and institutions to produce better life outcomes for children.

Making Connections is based on the premise that outcomes for children and families can improve if we improve neighborhood conditions, services, supports and economic opportunities—and enable families to use them effectively.

Making Connections operates at a national policy level and in selected local communities.

A Local Learning Partnership is a consortium of people and organizations in each *Making Connections* site charged with strategically using data to help shape and measure change efforts and to create a learning community around *Making Connections* ideas and experiences.

This Guidebook contains the Foundation's views of Local Learning Partnership roles and responsibilities, along with the views and experiences of Local Learning Partnership team members.

ABOUT *MAKING CONNECTIONS*

Children do well when their families do well, and families do better when they live in supportive neighborhoods.

This simple premise underlies *Making Connections*, the centerpiece of a decade-long commitment by the Annie E. Casey Foundation to improving the life chances of vulnerable children by helping to strengthen their families and neighborhoods.

Data consistently show that at-risk families are not scattered randomly. The worst outcomes for children can be tracked to a relatively small number of neighborhoods with many of the same characteristics – few job opportunities, few or no services, lack of vital sources of support, and scant acknowledgement of the need to help families identify their needs and strengths and fashion solutions themselves. To be a catalyst to strengthen families in these neighborhoods, the Foundation began working in 22 American cities in 1999 to promote neighborhood-scale programs, policies, and activities that contribute to stable, capable families.

WORST OUTCOMES FOR KIDS SHOW UP IN SPECIFIC, DISCONNECTED NEIGHBORHOODS

High Proportion of Families Not in Labor Force

West Side families are less likely to be in the labor force. For two out of five children under age 6 who live in the West Side corridor area, their parents are not in the labor force.

The West Side of San Antonio: A Report on Neighborhood Assets

Making Connections seeks to help families raise healthy, confident and successful children by tapping the skills, strengths, leadership, and resilience that exist in even the toughest neighborhoods. The initiative is founded on the belief that families and their children can succeed if the people who live, work, and hold positions of influence in distressed neighborhoods make family success a priority. In addition, there must be deliberate and sustained efforts within the broader community and at the state level not only to connect isolated families to essential resources, opportunities, and supports, but also to improve the material conditions of the neighborhood and the public policies affecting families and neighborhoods.

The Foundation is dedicated to helping selected communities engage residents, civic groups, public and private sector leadership, and faith-based organizations in efforts to transform the toughest neighborhoods into family-supportive environments. *Making Connections* is aimed at helping these cities build alliances and mobilize constituencies at the neighborhood level.

Making Connections has identified three kinds of connections essential to strengthening families:

» **Economic opportunities** that enable parents to secure adequate incomes and accumulate savings, thus assuring their families the basic necessities. To meet this need, communities must address job development, employment training, wage supplements, and asset-building strategies.

» **Social networks** in the community, including friends, neighbors, relatives, mentors, community organizations, and faith-based institutions that provide neighbor-to-neighbor support, help family members feel more confident and less isolated, and increase community mobilization and civic participation.

» **Services and supports**, both formal and informal, public and private, which provide preventive as well as ongoing assistance, and are accessible, affordable, helpful and relevant, neighborhood based, family centered, and culturally appropriate. These might include high-quality schools, health care, housing assistance, and affordable child care.

TAPPING EXISTING STRENGTHS CAN START A TRANSFORMATION FOR FAMILIES IN TOUGH NEIGHBORHOODS

Residents Choose Customized Solutions

Study circles in Seattle led to development of small projects developed by the various ethnic groups participating in the study circles. Examples of these resident-driven first steps toward neighborhood transformation included culturally-appropriate parenting classes for Vietnamese parents; training for parent-to-parent advocates in the Hispanic community; and providing mini grants to encourage small businesses.

FAMILIES NEED CONNECTIONS TO ECONOMIC OPPORTUNITIES, SOCIAL NETWORKS, AND SERVICES AND SUPPORTS TO BECOME STRONGER

After an initial phase during which *Making Connections* sites determined the levels of local enthusiasm, leadership, investment, and commitment present to support a long-term family strengthening through neighborhood transformation effort, the Foundation's contributions will consist primarily of supporting learning, analysis, and local leadership and resource development, such as:

» Helping residents and other stakeholders assess the condition, need, assets and strengths of families and neighborhoods;

» Providing technical assistance;

» Supporting community organizing around a common vision of family strengthening;

» Seeking opportunities to help various levels of government and the private sector to align their interests and activities with the community's vision of family strengthening; and

» Making flexible dollars available to seed innovative approaches that connect families to sources of support and leverage additional resources.

Making Connections breaks new ground in a number of ways, because it:

» Acknowledges the powerful effect family strength has on a child's success.

» Recognizes the role of the neighborhood in a family's success. Strong economic, social and service connections within a neighborhood help families overcome the hardships of poverty. Isolation exacerbates them.

» Makes people architects of their own solutions, and builds on what's already in place. This allows families themselves – the most reliable sources available – to illuminate the factors which help or hinder them. It makes programs more responsive to those they are meant to serve. People are also more likely to stick with solutions they have designed themselves.

» Addresses social ills (e.g., crime, teen pregnancy, unemployment) as a function of the isolation and social breakdown that lead to them.

FOUNDATION WANTS TO ENSURE ENDURING CHANGE BY DEVELOPING LOCAL LEADERSHIP, INVESTMENT, AND COLLECTIVE PUBLIC WILL

MAKING CONNECTIONS OFFERS NEW IDEAS AND BRINGS TO LIGHT OVERLOOKED STRENGTHS AND STRATEGIES TO IMPROVE THE WELL-BEING OF CHILDREN

Talking Together Leads to Group Action

People who attended the Des Moines neighborhood circles took on several collective actions as a result of identifying issues together and getting to know each other. For example, the King School circle met with the principal and achieved positive action about parking lot safety; the group went on to plan a Saturday School to help youth with homework. The Hmong circle set up a continuing structure to sharing across its different age groups both the preserving of native culture and understanding of American culture. The Sudanese circle began strategically planning for child care and a culture center.

Neighborhood Circles: Making Connections and Taking Action

» Nurtures leadership and stokes community activism, rather than simply underwriting programs. Seeks to tap a variety of public and private funding sources for continued support.

» Acknowledges the role that race, class and culture play in family and neighborhood success and seeks to overcome the barriers of discrimination and uneven distribution of opportunity.

» Emphasizes collection and use of data to set priorities, advocate for change and track success.

» Is part of a much broader Foundation effort to influence the public debate, build public will and advance policies that seek to improve child outcomes by strengthening families and neighborhoods.

WHAT WILL A SUCCESSFUL *MAKING CONNECTIONS* COMMUNITY LOOK LIKE?

Making Connections will have succeeded in a city when community leaders and residents have built a local movement with and on behalf of families that has the power and momentum to:

» Build on existing efforts and spur neighborhood-scale, family strengthening strategies that reduce family isolation by increasing their connections to critical economic opportunities, strong social networks, and accessible supports and services.

» Use these neighborhood-scale initiatives to rethink, revamp and redirect policies, practices, and resources on a citywide scale to improve the odds that all families succeed.

As each local movement grows, it will yield successes such as:

» Parents have the means, confidence, and competence to provide for their families economically, physically, and emotionally;

» Residents have people to talk to and places to go for help, support, and camaraderie;

» Families participate in and lead efforts to strengthen themselves, other families, and their neighborhood;

Learning that Information is Power

" *Understanding and learning about data helped me see that the information is ours. It is powerful and necessary to take action to change, get resources. Information is power. We can hold people accountable with that information. We can make things better.* "

Candace RedShirt
Resident staff of Denver LLP

MAKING CONNECTIONS WILL INFLUENCE CHANGE AT BOTH NEIGHBORHOOD AND CITYWIDE LEVELS

FAMILIES AND CHILDREN WILL BE BETTER OFF BECAUSE MORE CONNECTIONS ARE AVAILABLE TO THEM

» Families feel safe in their homes and in their neighborhoods;

» Children are healthy, succeed in school, and go on to college or a job after high school;

» Communities offer the resources families need to pass on a legacy of literacy and opportunity to their children.

WHAT DOES *MAKING CONNECTIONS* LOOK LIKE IN A SITE?

There is no typical picture of a *Making Connections* team in a site. The site teams consist of anywhere from 5 to 20 members, representing staff and consultants paid by the Foundation, local and state government, service providers, schools, United Way, and residents. A senior staff member at the Foundation serves as the Site Team Leader for each site. Most sites have a local coordinator. Each site also has a liaison to the Foundation's Technical Assistance Resource Center (TARC).

In addition, each site has a Local Learning Partnership (LLP) team made up of members representing various types of expertise around data collection and use, and a liaison to the Foundation's evaluation unit — called Measurement, Evaluation and Advocacy. People representing the LLP may or may not be part of the formal site team.

Site teams have evolved since they began, and membership is likely to shift over time due to formation of new partnerships, the addition of resident members, and the natural turnover in participating organizations. In addition, it is expected over time that the site team will transfer more of the leadership for the site work to the local coordinator.

SITE TEAMS HAVE VARYING COMPOSITION; SOME INCLUDE THE LLP COORDINATOR

WHAT IS THE CURRENT STATUS OF *MAKING CONNECTIONS*?

Making Connections began with an exploratory and developmental phase (Phase 1) in 22 cities to determine the fit between Foundation goals and local commitment to a long-term family strengthening effort through a neighborhood transformation. March 2002 marked the transition from *Making Connections*' developmental stage—concentrated on alliance- and capacity-building— to a second phase focusing squarely on measurable improvements in the well-being of children and families and the conditions of neighborhoods.

Ten sites are embarked on this longer, more difficult part of the journey. Five sites (Cohort 1) are in the initial group moving into Phase 2. They are Denver, Des Moines, Indianapolis, San Antonio, and Seattle. Up to five additional sites (Cohort 2) are expected to enter Phase 2 in spring 2003. They are Hartford, Louisville, Milwaukee, Oakland, and Providence.

Baltimore, the Foundation's home city, Washington, D.C., the nation's capital, and Atlanta, the headquarters city of United Parcel Service, will continue to be targets for significant civic investments consistent with the core principles of *Making Connections*. A customized funding strategy was developed to fit Boston's community strengths. The remaining sites (called Targeted Investment Sites) will receive targeted assistance to support specific activities that help foster strong families and neighborhoods. All 22 sites are considered part of the *Making Connections* Network, a community of people and places that can share valuable lessons, strategies, and tools from their efforts to help strengthen families.

During Phase 1, the Foundation encouraged local priorities to shape the initiative, but the Foundation's own agenda has become more visible in Phase 2 as it tries to connect the work to specific results. The key is to now find common ground between the goals of the Foundation and the sites.

Additional information about *Making Connections* is available on the Foundation's web site at www.aecf.org/initiatives/ntfd/index.htm.

TEN SITES ARE IN OR MOVING INTO PHASE 2 OF *MAKING CONNECTIONS*

WHAT IS A LOCAL LEARNING PARTNERSHIP?

A Local Learning Partnership (LLP) is a consortium of people and organizations with data-related expertise or interest in each *Making Connections* site currently charged with contributing to the overall results of the initiative through substantial contributions in three areas:

1. Development of outcomes, measures, and strategies to achieve results
2. Local and cross-site evaluation
3. Creating a learning community

LLPs were created by the Foundation to emphasize its belief that the effective use of data is essential to identifying, implementing and sustaining strategies to meet *Making Connections* goals and ensure that change occurs and is sustained. By creating a team focused on current, valid, relevant data that serve as information to propel change, with its own resource stream, the Foundation ensures that data remain prominent in the multifaceted *Making Connections* strategies.

LLPs are unconventional alliances that bring traditional data sources and users together with front-line data producers and residents. LLPs have different structures, participants, and priorities shaped by their communities.

Initially, the Foundation directed each Local Learning Partnership to carry out three core sets of activities:

p. 87

1. **Develop a "data warehouse,"** a comprehensive, integrated database of neighborhood-level information that is easily accessible to community members and organizations and can aid local and national evaluation.

p. 100

2. **Document the pathways of change** in the *Making Connections* process: record the change process to offer reflections that can inform future choices.

p. 81

3. **Build local capacity to use data to inform and propel change**, by supporting continuous learning among community

LLPS WERE CREATED TO STRESS HOW ESSENTIAL THE STRATEGIC USE OF DATA IS TO *MAKING CONNECTIONS* GOALS

LLPS WERE INITIALLY ASSIGNED THREE MAIN TASKS

members, advocates and organizations and encouraging collaboration between data holders/traditional researchers and potential data users in the community.

These activities were designed to support both *Making Connections* and to be a resource for broader community needs through:

» Improving community access to information. This means putting data in the hands of residents for practical uses and taking the mystery out of data collection and use.

» Enhancing local ability to use data for advocacy, planning and decision-making to strengthen families and neighborhoods, and to use data to hold others accountable.

» Creating a quantitative and qualitative baseline that will allow local stakeholders and the Foundation to monitor changes in families and the neighborhood.

Each word in the Local Learning Partnership name carries significance in meeting LLP goals and carrying out LLP activities.

"Local" refers to both the specific neighborhoods in which *Making Connections* is working, as well as the larger cities or communities in which those neighborhoods are located. LLPs strive to collect, analyze and disseminate information about people, resources and problems at a neighborhood level – getting behind generalizations from city, state or national data to better understand the lives of people in small, distinct subparts of an urban area. By being more aware of differences and similarities among neighborhoods, LLPs can also springboard their work to influence city-level policy and funding choices.

"Learning" includes increased knowledge and insight at many levels and about many subjects. LLPs lead a learning community around acquiring, interpreting and using data and increasing accessibility to it. LLPs seek to increase knowledge about emerging lessons of *Making Connections* within each person who is a member of the LLP, among the LLP team members, within the entire *Making Connections* team for each site, within residents of *Making Connections* neighborhoods and cities, and within the Foundation. Learning can come from other LLP team members, from technical assistance to LLPs, and through peer-to-peer inter-

---

LLPS HAVE A RESPONSIBILITY TO SUPPORT *MAKING CONNECTIONS* **AS WELL AS TO SERVE THE BROADER COMMUNITY NEEDS**

Dual Responsibilities: To *Making Connections* **and to Broader Community**

"*We're asking LLPs to align with Making Connections and produce data that move that work along. We're also asking them to create a broader learning agenda that is useful for the community. We go back and forth on those two strands. We do want both strands, but we understand they are not always concurrent or complementary.*"

*Evaluation Liaison,
Annie E. Casey Foundation*

THE LLP NAME CONVEYS IMPORTANT CONCEPTS

Neighborhood Data Hard To Get

We have learned that there is a wealth of data and information in the Dudley community, but that it is not always easily accessible. Even the established neighborhood initiative has not had the time or resources necessary to turn its data into more useable and sharable forms. We now see how we can collaborate with them to organize and update the data resources to make them accessible to all.

Reflections of Boston LLP team

actions among LLPs. Beyond the process of learning, LLPs encourage the application of their learning to influence strategies and decisions that help strengthen families and neighborhoods.

Increased learning is designed to help refine strategies to achieve the desired Foundation and local outcomes. In addition, learning among residents empowers them to claim greater ownership of data and to shift the balance of power in access and interpretation of data. As these shifts occur, LLPs seek to help local stakeholders start or strengthen a continuous learning process for *Making Connections* goals: what information do we need, what information do we have, what does it mean, what changes are needed, what is our plan to get there, how are we doing in reaching local goals, what else do we need to learn, how well is our plan working, how does it need to change?

"Partnership" also conveys a range of joint working relationships designed to increase learning and build connections among people and organizations who collect and use data in *Making Connections* sites. LLPs need to build or strengthen partnerships among:

» Neighborhood residents and resident groups

» Neighborhood residents and institutions that have historically collected and determined access to data

» The many data collecting groups in a community that may be looking at different pieces of the puzzle (or different puzzles)

» The *Making Connections* site team and the LLP

» Groups in the neighborhood or city that want data to support their efforts to improve the lives of families and neighborhoods and the LLP team members

In sum, Local Learning Partnerships are the part of the *Making Connections* team emphasizing the understanding, strategic use, accessibility, and community ownership of data about a neighborhood and its families — not for the sake of data, but for the sake of developing, measuring and sustaining strategies that result in strong, connected families in healthy neighborhoods.

The ultimate goal of a Local Learning Partnership is to create or increase local acceptance and integration of continuous learning and evaluation practice in all aspects of community change.

> *"The responsibility of the Learning Partnership is to make sure that learning happens."*
>
> *Garland Yates, Site Team Leader for Boston, Denver, and Detroit*

Data Users Working Together

Residents of the Making Connections neighborhoods in Indianapolis are meeting with the Indianapolis LLP to define their roles alongside current institutional partners. Institutional partners include the Indianapolis Neighborhood Resource Center, which serves as the LLP coordinator; United Way; and the POLIS Center, which operates a data center that will serve as the data warehouse. The University of Indianapolis Community Programs serves as a local (neighborhood) institutional partner for the neighborhoods of the Southeast and Martin University serves in this role for the Martindale Brightwood neighborhoods. These institutions will provide substantive technical assistance in the next phase of LLP work and will facilitate the core coordination and project management of neighborhood specific activities.

LLPS EMPHASIZE THE UNDERSTANDING, STRATEGIC USE, ACCESSIBILITY, AND COMMUNITY OWNERSHIP OF DATA

WHAT DOES THIS GUIDEBOOK CONTAIN?

This Guidebook contains a comprehensive description of the Foundation's current picture of Local Learning Partnerships operating within *Making Connections*. The descriptions are intended to inspire "what is possible"—and to synthesize a multitude of materials about LLPs.

The Guidebook first describes the genesis of LLPs, and the Foundation's views of the types of skills and personal outlook needed by members of an LLP. It then outlines six issues that cut across all types of LLP activities.

Following the cross-cutting issues are five chapters providing greater depth on major components of LLP work. Each chapter indicates how that component fits into the main roles of LLPs related to results:

1. Development of outcomes, measures and strategies for achieving results
2. Local and cross-site evaluation
3. Creating a learning community

The last chapters briefly discuss sustainability and the opportunity for LLPs to tip the scales on the success of *Making Connections*.

While the narrative text represents the Foundation perspective on LLPs, this Guidebook incorporates dozens of example of how LLPs are seeing and doing their roles. In addition, the Guidebook incorporates many of the results from a survey[1] of LLP coordinators and team members and an LLP self-assessment[2] to illustrate current practices, accomplishments, and gaps[3]. Brief profiles of each LLP are included in Appendix A.

The information from LLP coordinators and team members is based on self reports. No independent observations or analyses were made by the author. LLP contributions reflect their opinions and perspective during the spring and summer of 2002, when data were collected.

GUIDEBOOK TEXT REFLECTS FOUNDATION PERSPECTIVES

LLPS CONTRIBUTED EXAMPLES, OPINIONS AND ACCOMPLISHMENTS

INFORMATION FROM LLPS IS BASED ON SELF-REPORTS

[1] The "survey" includes information from a web-based survey of LLP coordinators and team members from Phase 2 sites and some Targeted Investment sites, as well as supplemental information furnished by LLP coordinators in Phase 2 sites. The information was gathered during the spring and summer of 2002. A full copy of the information gathering results can be found at www.aecf.org/initiatives/mc/llp/

[2] The self-assessment tool was developed by the evaluation liaisons at the Annie E. Casey Foundation. Each Phase 2 LLP team submitted an updated self-assessment as part of the information gathering for this Guidebook.

[3] A customized funding strategy was developed for Boston after the data for tables and figures were compiled for this Guidebook. As a result, data from Boston is included in tables and figures referring to Phase 2 and Cohort 2 sites.

CHAPTER 2: MODELS AND CONCEPTS THAT SHAPE THE FOUNDATION'S EXPECTATIONS OF LOCAL LEARNING PARTNERSHIPS

QUICK OVERVIEW

Local Learning Partnerships (LLPs) have an ambitious and complex agenda that grows out of the Foundation's deep belief that efforts that produce real positive change for children must be informed on an ongoing basis by data, analysis, measurement of progress, and learning.

LLPs are part of the structure supporting *Making Connections* in local sites. Their place in that structure varies among site teams.

LLPs have multiple clients and must juggle a constellation of relationships and responsibilities. LLP teams contain varying mixes of people with skills in research methodologies, involvement in the collection and use of data, residents, and representatives of neighborhood associations.

Early successes of LLPs fall in the areas of creation of and planning for their LLP team; initial data collection; skill building; development and dissemination of initial products; and changes in their communities as a result of their work.

Early challenges of LLPs relate to development of their LLP team; strategic planning for their work; data collection and use; and the complexities of ongoing operations.

LLPs are responding to Foundation priorities while also forming their own local visions of how they may progress.

The complex nature of a Local Learning Partnership is shaped by a number of interconnected ideas and expectations from the Foundation. Some of these have been explicitly stated; some have been more implicit; and some — such as the role of LLPs in local and national evaluation — are evolving. The evolution of LLPs is influenced by the work and direction of the LLPs themselves; by the progression of the overall *Making Connections* initiative and its renewed emphasis to a focus on results; and by ongoing learning within and among the Foundation and the LLPs.

LLPS ARE THE PRODUCT OF MANY INTERCONNECTED IDEAS

Initially, the Foundation presented LLPs with a difficult, comprehensive agenda and the expectation that they do innovative work, but did not provide a detailed template. LLPs were expected to experiment, learn, and find creative ways to carry out their charge — with the support and encouragement of the Foundation's evaluation liaisons. Some evaluation liaisons have reflected that they

LLPS HAVE AN AMBITIOUS AND COMPLEX AGENDA

may have promoted development of specific tools and general capacity building in the early stages of *Making Connections*, and were therefore not sufficiently stressing the LLPs' role in overall theory of change or development of strategies. Currently, the Foundation's emphasis on generating and measuring specific results has caused LLPs to become more involved in evaluation activities.

This chapter takes a look at some of the major ideas and expectations that steer the Foundation's outlook about LLPs and provides information on how LLPs are thinking about and acting in this multi-layered landscape.

WHERE DID THE LLP IDEA COME FROM?

Formation of Local Learning Partnerships grows out of the Foundation's overall strategic direction; its experience in other data-focused efforts (including KIDS COUNT and the National Neighborhood Indicators Partnership); its experience with previous evaluation efforts; and the underlying goals and approach of the *Making Connections* initiative.

LLPS GROW OUT OF THE FOUNDATION'S BELIEF IN THE POWER OF DATA

When the Foundation's Board of Directors approved a new strategic framework in 1996, the collection and deployment of data to affect change was in the spotlight. The Foundation's experience demonstrated that using data strategically had contributed to change efforts at high political levels, within state and regional social service systems, and in neighborhood revitalization work.

***MAKING CONNECTIONS* PLACES AN INCREASED FOCUS ON DATA COLLECTION, ACCESS, AND STRATEGIC USE**

So it was predictable that data would have a prominent role in the Foundation's major *Making Connections* initiative that arose from the new strategic direction. In fact, the potential success of *Making Connections* is based to a significant extent on this premise: that in each targeted neighborhood, a new culture must emerge in which data and information are seen as indispensable tools for building better communities and stronger families. LLPs are the primary vehicle in promoting the strategic use of data among neighborhood residents and other local stakeholders.

Data Make a Difference

"*Data utilization has become a hallmark of the change strategies that are employed and supported by the Annie E. Casey Foundation. Put simply, we believe that data and information make a difference.*"

Tony Cipollone, Vice President Measurement, Evaluation and Advocacy, Annie E. Casey Foundation

The use of data per se to inform policy decisions is not a novel idea. However, decision-makers often do not have or use data that

are relevant and useful to disconnected families and neighborhoods. Too often ordinary people do not have access to data, nor are they encouraged to use data as a valuable tool for improving their lives and neighborhoods. Sometimes mountains of data are collected, but not used effectively to clarify issues, develop strategies for change and assess progress. The Foundation seeks to shift the use and power of data to address these shortcomings.

The Foundation has extensive involvement in using data in innovative ways. Since 1990, KIDS COUNT (http://www.aecf.org/kidscount/), a national and state-by-state effort to track the status of children in the U.S., has sought to enrich public discussions about the ways to secure better futures for all children. Annual reports use the best data available to measure the educational, social, economic, and physical well-being of children state-by-state. State-level KIDS COUNT projects provide a more detailed county-by-county picture of the condition of children. KIDS COUNT reports receive extensive media coverage; have provided grist for editorial opinions on improving the lives of children; inform public debate and strengthen public action on behalf of children; and have been the catalyst for public and private initiatives to improve children's lives.

p. 87

In addition, the Foundation and the Rockefeller Foundation co-sponsored the National Neighborhood Indicators Partnership (www.urban.org/nnip), a collaborative effort by the Urban Institute and local partners to further the development and use of neighborhood information systems in local policymaking and community building. Each local partnership has collected quantitative indicators of neighborhood health; used the indicators to build databases as tools for community collaboration and action; and increased community capacity to use data effectively. These NNIP efforts strongly resemble the data warehouse function of Local Learning Partnerships.

Eleven *Making Connections* sites already were members of the National Neighborhood Indicators Partnership when they were asked to develop Local Learning Partnerships. In some ways, NNIP participants had an advantage in forming and operating an LLP — since they already had obtained a lot of data and had developed some relationships with various data sources. On the other hand,

LLPs Can Empower Neighborhoods

"*LLPs are more than neighborhood-level Kids Counters. They are intended as more than technical assistance resources of local planners and managers. We hope the work of the LLPs can serve. . .a neighborhood empowerment function. They have the potential of strengthening neighborhood voices and resident partners and leaders by equipping them with accessible, understandable and influential ways of expressing inequities [and] disparate impacts. . .*"

Doug Nelson, President
Annie E. Casey Foundation

MANY *MAKING CONNECTIONS* SITES ALREADY HAD AN ESTABLISHED DATA WAREHOUSE

LLPs have a broader mission and a more complex set of relationships to balance — so in some cases LLPs starting with a blank slate benefited from not having to shift from an established framework to a new role. Several NNIP groups have been willing "guinea pigs" in shifting from the NNIP framework to the more expansive LLP model.

In sum, the Foundation's overall belief in the power of data to create change, its learnings from other major data-focused ventures, and its design for *Making Connections* drove the need for Local Learning Partnerships.

WHERE DO LLPS FIT IN THE *MAKING CONNECTIONS* STRUCTURE?

Local Learning Partnerships exist because the Foundation believes that efforts that produce real positive change for children are informed on an ongoing basis by data, analysis, learning, and the measurement of progress toward defined outcomes. LLPs are intended to play a pivotal role in *Making Connections* sites in defining the local theory of change, in developing strategies, in selecting and measuring progress toward outcomes, and in leading sites to reflect upon and learn from their work.

In practice, however, the structure and management of site teams has not consistently integrated or maximized the LLP capabilities. Further, some LLPs were less clear about or less ready to take on their full agenda during their initial years. As a result, there is a range of levels at which LLPs are currently engaged in the *Making Connections*' structure and functions.

The shape, size, type and depth of relationships in play differ among Local Learning Partnerships. The factors that determine the "fit" of a particular LLP include the philosophy, style, and areas of expertise of the Foundation's site team leader, the Foundation's evaluation liaison, the local site coordinator, and the LLP coordinator.

Some LLPs Participated in NNIP

The Oakland LLP is coordinated by the Urban Strategies Council, which has operated an NNIP warehouse for years — collecting administrative and other datasets from the school district and city and county agencies; providing by-request analyses for local community-based agencies and residents; and publishing reports.

THE PLACE OF AN LLP IN THE *MAKING CONNECTIONS* STRUCTURE DIFFERS WIDELY

In addition, LLPs differ in whether they grew out of previous Foundation or local efforts or began from the ground up; in the local political forces at play; and in the composition of their team.

Within the Foundation, the site team leader has overall leadership and responsibility for a *Making Connections* site, as guided by the Board and top level management. Site team leaders gain expertise and support through various Foundation divisions, including Community Change Initiatives; Measurement, Evaluation and Advocacy, where evaluation liaisons work; and the Technical Assistance Resource Center, which assigns a liaison for each site. These three Foundation units not only have people who are directly relating with counterparts at the site level, they are also part of multifaceted internal relationships from which the sites derive guidance and financial resources. Foundation resources often flow in multiple contracts or processes to the sites.

SEVERAL FOUNDATION DIVISIONS PLAY A ROLE IN *MAKING CONNECTIONS*, INCREASING THE COMPLEXITY OF ITS STRUCTURE

At the site level, the local site coordinator works with the Foundation site team leader to head up the local *Making Connections* team. The LLP coordinator is ideally part of that team, although in some sites the LLP initially operated quite separately from the overall *Making Connections* team. The increased weight given to producing results is leading to better integration between LLPs and the local site teams, and clearer understandings about their respective roles.

It is in the interplay within the Foundation, within the site, and between the Foundation and site that the "fit" of LLPs becomes more complex and sometimes confusing. LLPs have responsibilities in many directions; they have many types of responsibilities; and the messages, guidance and direction they receive may be ambiguous or even in conflict.

LLPS HAVE MYRIAD RESPONSIBILITIES TO A CONSTELLATION OF PARTIES

The following sections explore in more detail the web of responsibilities and relationships the LLPs encounter, and provide examples of how some LLPs are responding to these challenges.

WHO IS THE CLIENT?

As an LLP coordinator or team member, it is important to consider priorities, decisions and actions in light of who LLPs believe the client is. This is far from a simple concept, yet it holds central importance. A client is normally the person or organization to whom you owe an allegiance or duty — someone on whose behalf you are acting and someone to whom you are answerable.

When the same person or organization is paying for your services and guiding your work, it is fairly simple to know who your client is. However, if you are being paid by one group, but someone else believes they direct your work, and another group believes you are answerable to them, things get a little more complicated. You may have multiple clients, with some overlapping responsibilities and some loyalties that are unique to each client. At a minimum, it is important for all parties to have a clear picture of the allegiances, duties, and accountability of LLP coordinators and team members.

The Foundation views the overall *Making Connections* change process as the client for LLP work. However, in surveys and interviews, only one LLP Coordinator shared this view. That coordinator pointed out this might mean working more with Casey sometimes, sometimes more with local government, sometimes more with families. This coordinator also observed that in sites where families are not yet strongly involved, it's hard to say they are a client if they are not yet engaged.

LLP coordinators who were interviewed had responses that ranged from an adamant position that residents are the primary client to an easy acceptance of the position that LLPs inherently will have multiple clients. One noted that the struggles around this question had been highlighted during discussions about the national evaluation and the content and process for the initial cross-site surveys of residents.

LLP coordinators and team members had a range of opinions on this topic, as shown in the tables below. Both LLP coordinators and team members chose residents of the *Making Connections* neighborhoods as the group they believed should receive the most benefit from LLP work. The local site team was also commonly

TO WHOM DO LLPS OWE WHAT ALLEGIANCE?

Indianapolis Identifies Four Clients

"*We have realized that LLP clients include not only the two Making Connections neighborhoods, but also a citywide initiative. Also, the greater focus on results in Making Connections has encouraged the Foundation to formally designate themselves as the fourth client of the LLP.*"

Lamont Hulse, Indianapolis LLP Coordinator

THE FOUNDATION VIEWS THE OVERALL *MAKING CONNECTIONS* CHANGE PROCESS AS THE CLIENT FOR LLP WORK

Residents First, But Not Only, Client

"*We believe our clients are residents first. Then, in our case, we are all representing institutions, and we each see our institution as a client. Sometimes it feels like the primary client is Casey, especially when there are specific mandates. We recognize the different agendas and try to see where the similarities are.*"

Louis Mendoza, Former San Antonio LLP coordinator

mentioned as a primary client. Coordinators and team members also viewed Foundation staff as those they were serving. The responses confirmed the view that LLPs have multiple clients.

Multiple Clients Part of Reality

"*We expect to have multiple clients and that's how we work well, that's our role, that's what an LLP is.* "

"*The multiple client situation is what makes it fun and challenging and is just part of the reality of what an LLP is.* "

Two LLP coordinators

FIGURE 1: ON WHOSE BEHALF IS COORDINATOR ACTING (COORDINATORS' RESPONSES)

Legend:
- Also on their behalf
- Primarily on their behalf
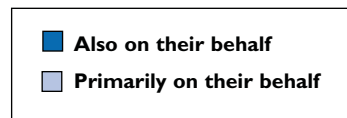
TABLE 1. WHO BENEFITS FROM LLP WORK (TEAM MEMBERS' RESPONSES)

	Currently Most Benefit	Should Most Benefit
Residents of *Making Connections* neighborhood	17	46
Residents of your entire city	3	11
The local site team	23	17
The Foundation's Evaluation Liaison	14	10
The Foundation's Site Team Leader	12	11
Other	8	7

HOW DID LLPS GET STARTED?

Each Local Learning Partnership got underway in a different manner. Initial participants were most commonly tapped by Foundation site team leaders or evaluation liaisons, who frequently began by identifying current data skills and resources in a community. A brief description of how the LLPs began in the Phase 2 sites is contained in the LLP profiles in Appendix A.

WHAT IS THE COMPOSITION OF AN LLP?

The composition of each Local Learning Partnership varies. In most places, the LLP consists of three to five people who have some skill in research methodologies or current involvement in the collection and use of data. In a few places, residents and represen- tatives of neighborhood organizations play the lead or strong roles in LLPs. Resident members are essential to ensure relevance and reality within LLP activities, and to build the capacity of residents to gather, analyze and use data to improve their lives. Team members may also represent a community-based agency, local government, United Way, a university, a consulting firm, a community foundation, a neighborhood association, or other groups.

MOST LLP TEAMS HAVE MEMBERS WITH SKILL IN RESEARCH METHODOLOGIES OR INVOLVEMENT IN DATA COLLECTION; A FEW HAVE RESIDENT MEMBERS

LLP Membership May Shift Over Time

The Dudley Street neighborhood was one of the Foundation's Rebuilding Communities' sites prior to its inclusion in Making Connections. Expansion of stakeholders and leadership required a great deal of time and negotiation. In the meantime, the LLP began a series of projects and tried out and reshaped its membership and increased emphasis on building a cohesive partnership. The Boston LLP now includes representatives of:

» Abt Associates
» The Boston Community Building Network at the Boston Foundation
» Interaction Institute for Social Change
» The Mauricio Gaston Institute/UMass-Boston
» The McCormack Institute's Center for Social Policy/UMass-Boston
» The Metropolitan Area Planning Council
» The Women's Union/ Massachusetts Family Self-Sufficiency Project
» YouthBuild/Boston
» The Making Connections local site coordinator and communications
*   coordinator*

LLPs contain people from traditional data-holding organizations. Increasingly, they also include nontraditional data partners, such as ethnographers who learn about the culture of groups of people by extensive observation; advocates; and librarians.

The affiliations of current Phase 2 coordinators and of team members are shown below.

LLP Formed from Existing Group

In Louisville, an existing consortium of public and community organizations, the Community Resource Network, was chosen as the LLP. That table has been expanded to include a wider array of groups, and the LLP is working to add residents.

FIGURE 2: GROUPS REPRESENTED BY COORDINATORS ON LLP

- University or college 11%
- Community foundation 11%
- Independent consultant or consulting firm 28%
- Community-based organization/non-profit 17%
- Local data collection/ mgmt organization 33%

FIGURE 3: GROUPS REPRESENTED BY TEAM MEMBERS ON LLP

Public library 1%
Resident or community member 6%
Local data collection/ management organization 18%
Resident organization 15%
United Way 7%
University or college 15%
City/County government 12%
Community foundation 1%
Independent consultant or consulting firm 4%
Community-based organization/non-profit 21%
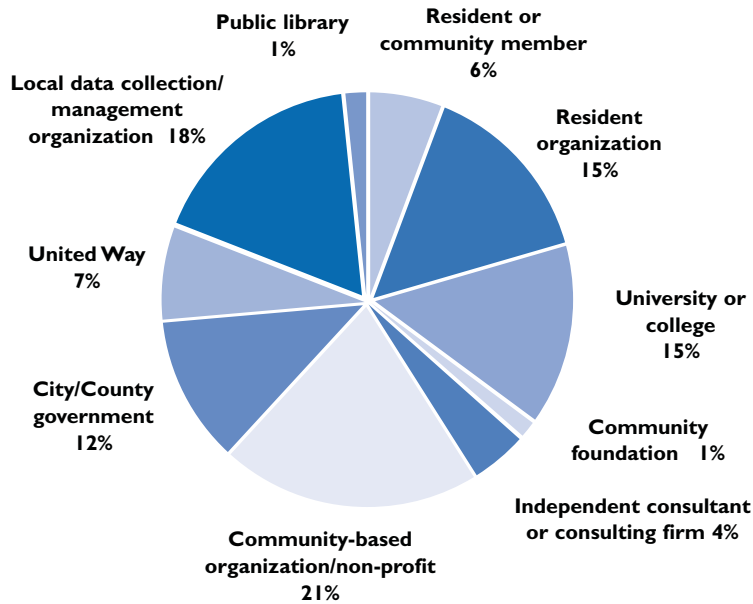
The composition of an LLP can be influenced by relationships the Foundation has developed in its neighborhood (e.g., Rebuilding Communities Initiative which took place in five *Making Connections* cities), data-related, or system change projects. It can also be influenced by residents, who may object to including team members who hold stereotyped views of people living in tough circumstances in tough neighborhoods.

LLP members should represent the racial, ethnic, cultural, and class make-up of their communities, and should include both men and women and people of different age groups. This helps ensure that data are attentive to and accurate about racial, cultural, class and gender differences.

The extent to which LLP coordinators believe their team is representative of their community is shown in the graphs below.

LLPS SHOULD LOOK LIKE THE NEIGHBORHOODS THEY SERVE

FIGURE 4: EXTENT TO WHICH LLP IS REPRESENTATIVE
OF SPECIFIC GROUPS (COORDINATORS' RESPONSES)
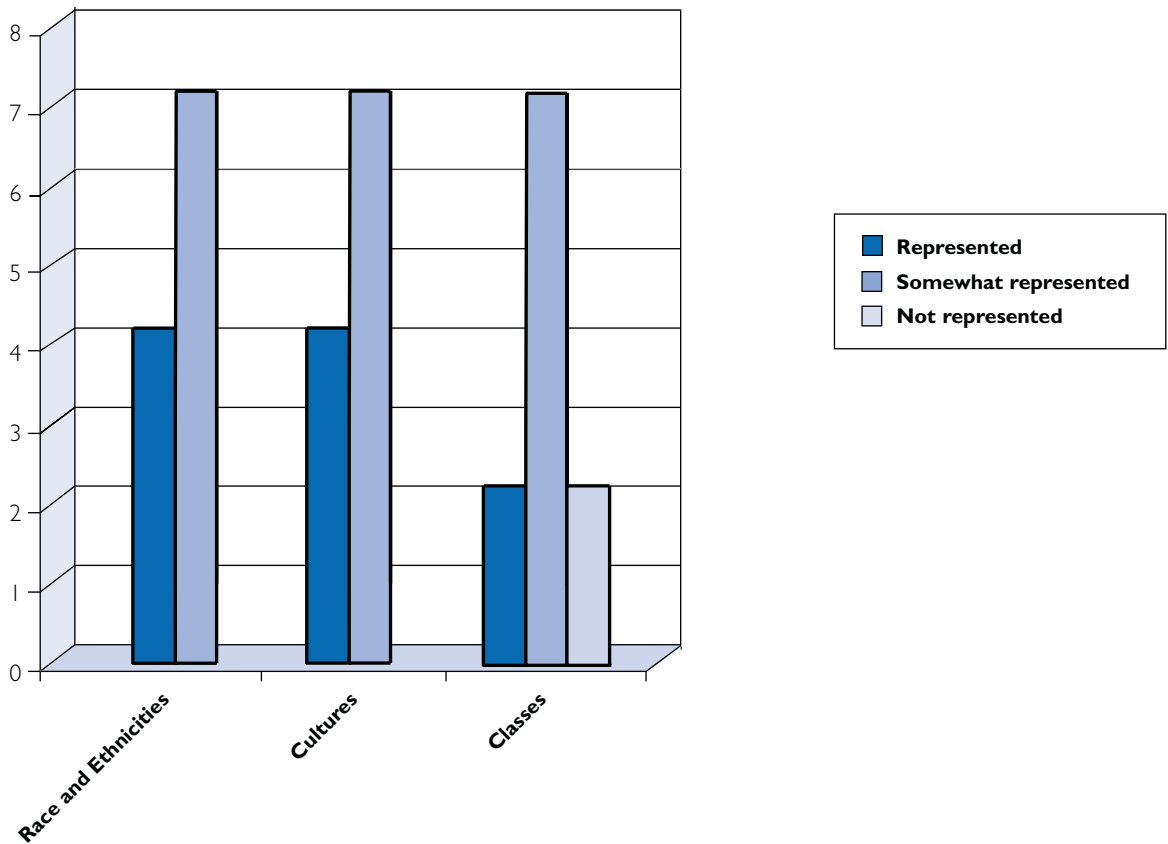
FIGURE 5: GENDER COMPOSITION OF LLP
(COORDINATORS' RESPONSES)

Women are more
heavily represented
36%

Men and women
are about equally
represented
46%

Men are more heavily
represented
18%
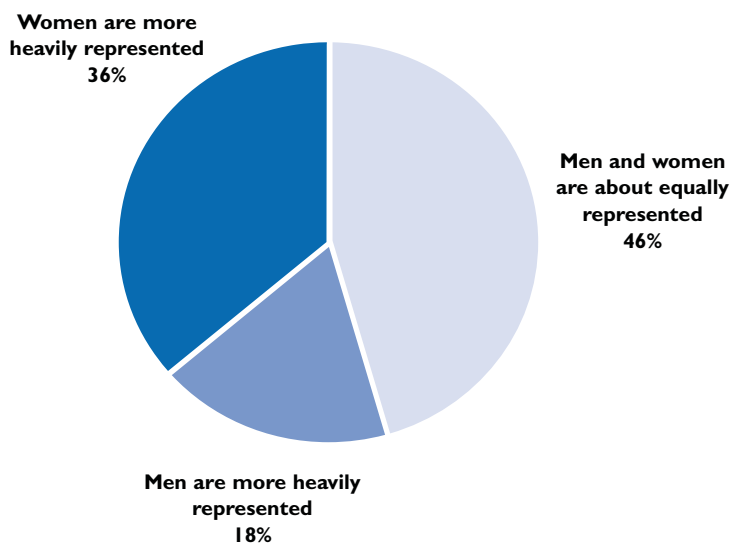
Most LLPs have a coordinator or "lead partner" who convenes and manages the LLP. The extent of the coordinator's responsibility varies. LLP team members may carry out individual projects that are part of the LLP agenda; they may work together as a group on projects; or they may do both.

The lack of an initial blueprint from the Foundation for LLPs led to both confusion and creativity in team composition. At first, it was hard for both Foundation staff and local stakeholders to under-stand what an LLP might look like — or conversely to describe what it shouldn't be. The flexible framework has opened up possi-bilities -- and contributed to ongoing struggles with the shape and focus of some LLPs.

The Foundation's evaluation liaisons are striving to provide clear guidance and assistance to LLP coordinators so they can maximize the flexibility of the model while adequately managing its ambiguity. As the *Making Connections* strategy in each site becomes more defined, LLPs can more easily determine what learning is needed within a site and focus their agenda.

WHAT ROLES DO LLP PARTNERS FULFILL?

Current LLP coordinators report fulfilling myriad roles, with most naming almost all of the categories below as either a main or sec-ondary role for them.

As would be expected, team members appear to have more discrete roles. Both coordinators and team members report signif-icant involvement in strategic use of data, resident engagement, and creating and disseminating information.

LACK OF A BLUEPRINT LEADS TO CONFUSION AND OPENS UP POSSIBILITIES

All-Resident LLP in Denver

"*The Foundation approached the Piton Foundation to convene the LLP in Denver. Piton proposed convening an all-resident LLP, and the Foundation agreed. Through outreach, working with residents Piton already knew, and referrals from other residents, Piton formed two neighborhood learning partnerships, one in each of the neighborhood focus areas (which later merged into a cross-neighborhood LLP).*

Piton staff provided support to the residents, who were the decision makers. Piton convened a 'resource team' of researchers, data providers, technology providers, and others to serve as support to the LLP. However, the residents quickly developed their own processes for contracting out key LLP projects. There were and there are no other institutional partners to the LLP."

*Terri Bailey,
Denver LLP coordinator*

FIGURE 6: MAIN AND SECONDARY ROLES ON LLP (COORDINATORS' RESPONSES)
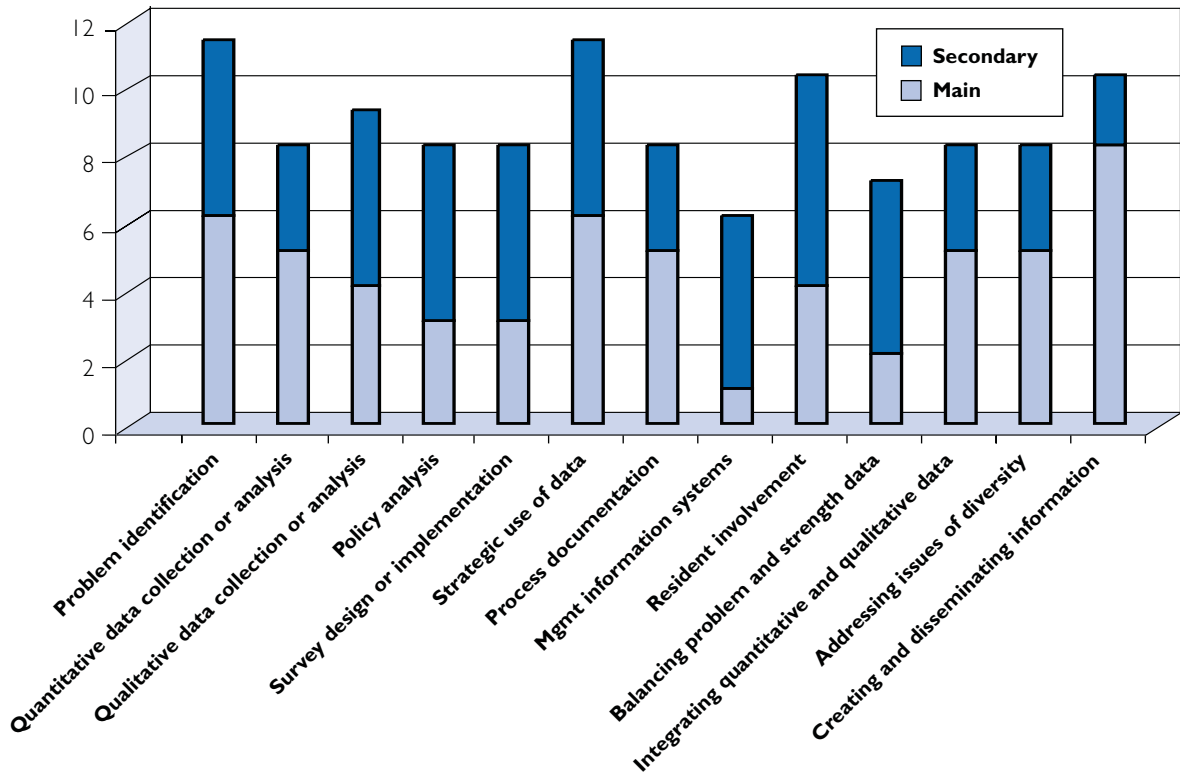
FIGURE 7: MAIN AND SECONDARY ROLES ON LLP (TEAM MEMBERS' RESPONSES)
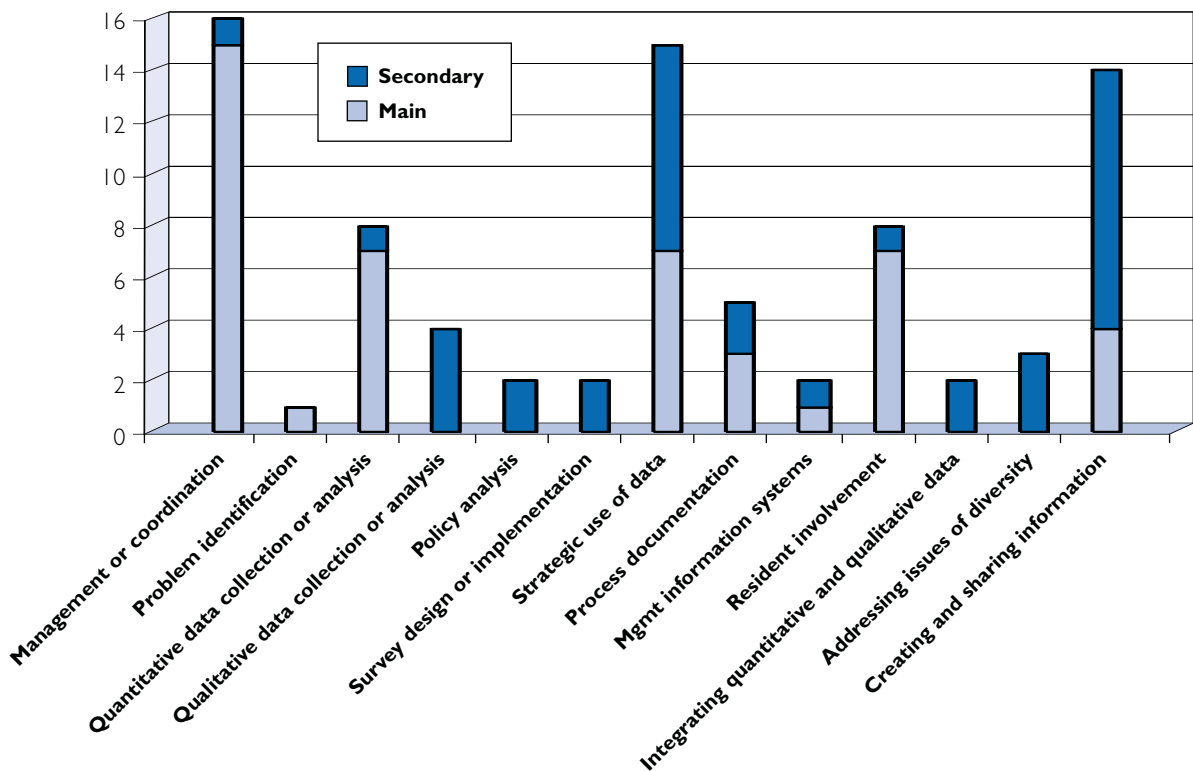
IN WHAT AREAS HAVE LLPS FOCUSED THEIR ACTIVITIES AND PRODUCTS?

The graph below summarizes the frequency with which LLP teams are involved in activities or have developed products related to specific topics of their work.

FIGURE 8: PERCENT OF MAJOR ACTIVITIES AND PRODUCTS RELATED TO KEY TOPIC AREAS
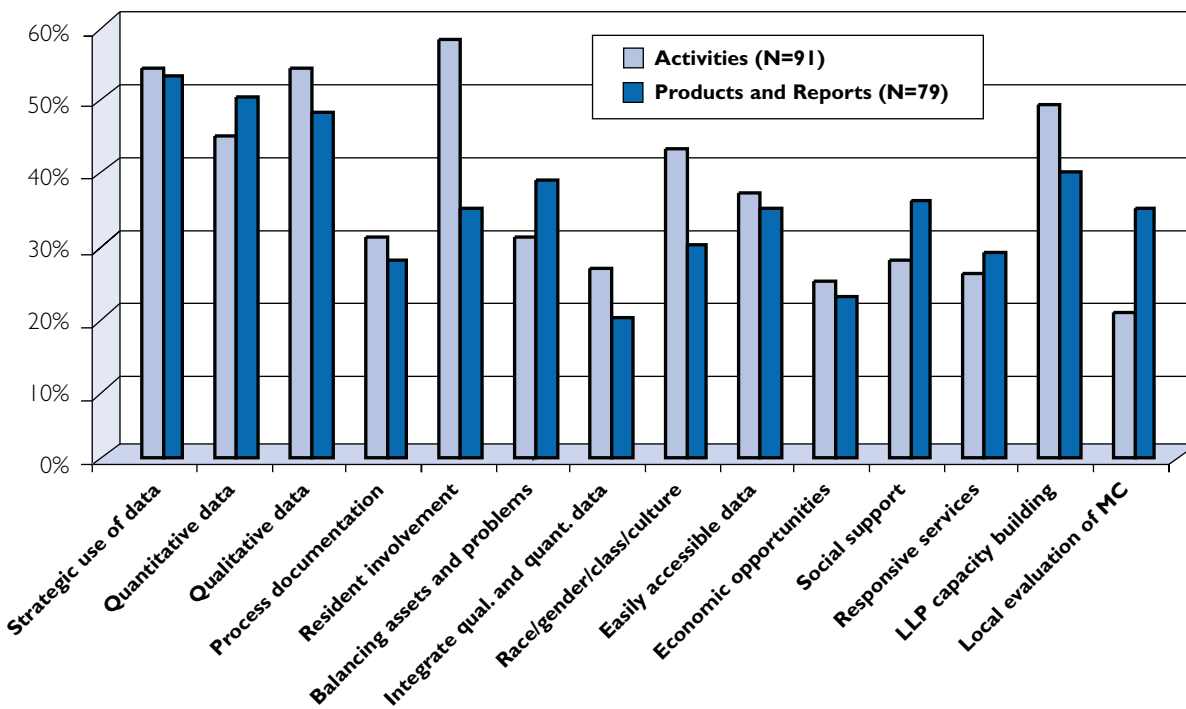
LLP coordinators reported the following topics as their current main activities.

TABLE 2. CURRENT FOCUS OF ACTIVITIES AND PRODUCTS (COORDINATORS' RESPONSES)

LLP Team
» Work to increase resident, youth and minority representation in LLP
» Build relationships with other non-profit community organizations
» Develop organization and administrative structures

Strategic Planning for LLP
» Clarify mission and vision
» Develop action steps
» Develop work plan
» Develop business plan for community learning centers

Data Collection and Use
» Build warehouse of data sets, resources and materials about the community
» Respond to data/information requests
» Identify where and how families gather and communicate
» Data collection
» Support local efforts of data collection and use
» Story circles
» Process documentation
» Data analysis

Evaluation/Tracking Results
» Create local evaluation plan that complements *Making Connections* evaluation and supports local data needs
» Become the locus for ongoing work in defining community outcomes and indicators
» Baseline data collection

Technical Assistance
» Identify technical assistance needs
» Build skills across neighborhoods
» Support other initiative-wide learning needs
» Support community communication needs
» Develop family assets and engagement strategies
» Build the capacity of organizations and residents to use data strategically

Public Awareness
» Ensure awareness and relevance of activities among service providers

Products
» Prepare for release of first data product
» Launch website
» Work directly with agencies to develop products
» Develop a Family Security Index and a Family Economic Profile
» Produce a demographic profile for specific neighborhood

WHAT RESOURCES DO LLPS HAVE TO WORK WITH?

The Foundation's evaluation liaisons work with each LLP and the site team leader to develop an annual LLP work plan and budget. The amount of funding provided by the Foundation each year to an LLP is shaped by the work plan, the stage of evolution of the LLP, the resources available from other sources, and the amount of Foundation resources allocated. Foundation funding varies from year to year and from site to site. On average, the Foundation has provided $100,000 to $300,000 annually per LLP. In addition, some LLPs have received additional funding from the Foundation for specific activities, as well as financial and in-kind support from other organizations.

Managing and coordinating the funding can be challenging for both the Foundation and for LLPs. In some cases, grants may be made to one organization that is expected to bring in other partners. In other cases, separate grants or contracts are used with several of the LLP team members. Either method may prove limiting or create challenging dynamics among LLP team members.

In some cases, Foundation funding has not been flexible enough to meet emerging needs. Grants based on producing specific products did not account for staff time spent on responding to resident or neighborhood needs or other forms of relationship building. More recent grants are designed to provide greater flexibility within a general area of work.

Many LLPs are at least partially connected to existing data organizations, whose mission is related to that of *Making Connections*. These organizations may be able to provide time, data, office space, and expertise via their ongoing work or through modest leveraging investments by the Foundation.

HOW DO LLPS BALANCE COMPETING DEMANDS AND SET REASONABLE EXPECTATIONS?

Some Local Learning Partnerships have developed their own strategic plans to guide priorities and work plans. Those plans, or more informal mechanisms, must be flexible and balance numerous

LLP RESOURCES ARE CUSTOMIZED TO EACH SITE

Building on Local Resources to Develop LLP

" *Louisville has been able to build on numerous organizational resources in developing its LLP. They include:*

» The Community Resource Network, an 11-year-old collaborative which produces and updates a comprehensive queriable database and publishes a directory of social services.

» Partner organizations, including the University of Louisville, have extensive, discrete databases that will be shared.

» The Louisville and Jefferson County Information Consortium, which has a huge set of GIS-based information on County infrastructure, to which the LLP has licensed access.

» Non-profit organizations are engaged in community building and neighborhood organizing work and will help in engaging residents to use data to achieve their community goals. "

Howard Mason, Louisville LLP team member

responsibilities. LLPs must first and foremost support and advance the strategies of their sites' overall *Making Connections* effort — by providing and interpreting data that contribute to change and helping to measure that change. They must also help develop a baseline of family and neighborhood well-being, develop a data warehouse, and document the pathways of change. As both a means to fulfill these responsibilities and as an important end result, they must enhance the ability of residents and local stake-holders to use data for planning and decision-making efforts where there is a real chance of an important payoff in strengthening families and neighborhoods.

The Foundation is also increasingly calling on LLPs to coordinate local elements of the cross-site evaluation and local evaluation efforts in order to track and report results.

Even within these highest level duties, LLPs must set priorities, determine a reasonable sequence for activities, establish a reason-able scale and scope for each activity, obtain needed resources, and deploy team members effectively. Yet they must remain open to moving quickly to take advantage of new opportunities or mandates that may emerge.

LLPs must also attend to the priorities of resident members of their LLP and residents in the *Making Connections* neighborhoods if they expect to build interest in the use of data and the capacity of residents to use it.

When LLPs see or hear about exciting approaches from other places, they may begin to think each of their activities must be as creative, comprehensive, innovative or powerful as those they see highlighted at Foundation conferences or in Foundation materials. In truth, no single LLP has the ability or resources to produce that result. Some highlighted examples would consume all of the time and funding of an LLP for several months or years; some only occurred because a novel opportunity arose; some just don't fit for most sites. The Foundation strongly believes in expanding people's sense of what is possible and in exposing them to new ways of looking at things. LLPs need to widen their view of possibilities and try new techniques while ensuring that they can keep up with basic duties.

THERE ARE SOME CLEAR FOUNDATION PRIORITIES FOR LLPS — INCLUDING A RENEWED EMPHASIS ON EVALUATION

LLPS MUST JUGGLE PRIORITIES, TIMELINES AND RESOURCES

LLPS CAN STAY OPEN TO NEW IDEAS WHILE BEING REALISTIC ABOUT WHAT THEY CAN DO

LLPs also need to gauge the pace at which its partners can effectively move, and the risk of trying to juggle too many things at one time. Moving too fast on too many fronts can leave partners exhausted and confused. Starting smaller, achieving results, and building to the next stage may lead to better sustainability in the long term.

Because *Making Connections* is a decade-long initiative, LLPs have a lengthy period of time in which to sequence their priorities. They can start and stabilize some functions early on, and then give greater attention to other needs at different stages of the initiative. However, they will likely always have ongoing tensions among competing needs and opportunities.

MOVING TOO FAST ON TOO MANY FRONTS CAN BE COUNTERPRODUCTIVE

Coordinator Approaches for Setting Priorities

When LLP coordinators were asked in interviews how they set priorities for their resources and time, they gave the following responses:

» *We often prioritize by circumstances, responding to Casey-driven projects and site strategies.*

» *I try to keep in mind the dual mission of our LLP — to be a central repository of data and to increase capacity of neighborhood organizations to use that data. I use these as guideposts for what I need to be doing next. But the other reality is that there are things that have to happen — on-the-ground realities and then Casey demands. We have to balance both. We struggle to balance them.*

» *Our first priority was on data that would be useful to people. Our funding comes from several different pots — not just Casey, so we have a bigger pool of priorities to juggle. When the Census data becomes available, that event will keep us busy for awhile.*

» *We started off tackling a list of things Casey defined, rather than waiting to see what the community had questions about. Now we're trying to be more responsive to what the community wants. Everything takes longer than anticipated.*

» *We already had a data warehouse when Casey came in, so we had the luxury of deciding what we wanted to do next. We put all the Casey resources in community capacity building — training, access to data, forming a joint learning plan.*

» *We immediately decided that a web site could become a middle ground to make information accessible as soon as we acquired it. We decided to create a resident-friendly web environment, to let people see this was a work in progress, that we didn't have to wait to have a perfect web site. We also started talking to people who were doing community outreach and hired a technical assistance team to work as community liaisons. We talked about research being important to social change, and about working to break down barriers between the university and the community.*

WHAT SUCCESSES HAVE LLPS ACHIEVED SO FAR?

LLP coordinators identified the following as their biggest accomplishments to date. Accomplishments spanned creation of and planning for their LLP team, initial data collection, skill building, development of initial products, and early changes they see in their communities as a result of their work.

TABLE 3. BIGGEST ACCOMPLISHMENTS OF LLPS (COORDINATORS' RESPONSES)

LLP Team
- » Hired a highly qualified and diverse staff
- » Built on existing resources in the community
- » Utilized resident staff to staff key components of LLP
- » Developed relationships with *Making Connections* neighborhood leaders and residents
- » Developed relationships with site coordinator and key partners
- » The fact that the LLP exists in the community
- » Resident-driven identification of new institutional partners

Strategic Planning for LLP
- » Developed a strong, flexible, ambitious and feasible plan for LLP with local stakeholders
- » Developing identity of and guiding principles for LLP
- » Being intentional about building on existing community resources
- » Using data and managing resources at the local level
- » Effectively integrated LLP into larger *Making Connections* initiative

Data Collection and Use
- » Developing methodology for and beginning process documentation
- » Selected data analyses
- » Provided timely and useful data to residents and community-based organizations
- » Helped define initial target area and built community demographic profile
- » In-depth analysis of focus group data re: resident ideas of strategies and desired change
- » Ethnographic study of a local resident population re: major issues and desired change
- » Development of story circles as powerful relationship building tool
- » Completion of a data collection initiative by an LLP member
- » Residents created and implemented an innovative, community-based and driven data collection effort
- » Identification of family priorities for family strengthening

Evaluation/Tracking Results
- » Led the identification and articulation of Phase 2 markers
- » Developed a "thinking framework" to document *Making Connections* investments and activities
- » Participated in creation of a results framework

Technical Assistance

» Helped to develop the research skills of community-based organizations
» Helped convene the Neighborhood Family Summits
» Convened community-based researchers to share information about available data
» Assisted site coordinator in developing contract scopes of work for agencies receiving Foundation funding
» Building capacity (research skills) in residents

Products

» Development of web site
» Database of asset based information on local service providers and service oriented businesses
» Resident-driven community activities component (community calendar)
» Updated a Neighborhood Resource Directory
» Production of *Making Connections* Bulletin — a vehicle for synthesizing and delivering information to residents
» Helped construct a Family Security Index
» Helped improve access to Social Assets and Vulnerabilities Indicators database by developing web-based version and training residents
» Completion and dissemination of workforce studies
» Development of an information clearinghouse that will allow monitoring of key indicators for *Making Connections* initiative

Changes in Community

» Increased awareness of role of technology in community
» Organizations and institutions have changed the way they do business (use of data, community organizing)
» Creation of an inclusive 'learning' community

WHAT CHALLENGES HAVE LLPS ENCOUNTERED SO FAR?

LLP coordinators reported numerous challenges, with the greatest number related to development of their LLP and strategic planning for the LLP. The concentration of challenges in those areas is not surprising, given that LLP coordinators were reporting mainly on the start-up phase of LLPs.

Team members also reported numerous challenges in the creation and functioning of their LLP team. They cited a high proportion of challenges in the areas of data collection and use and general operations of the LLP (adequate funding, time available, keeping everyone on the same page, coordination of meetings, etc.).

TABLE 4 . BIGGEST CHALLENGES OF LLPS (COORDINATORS' RESPONSES)

LLP Team
- » Developing a leadership structure and manner of operation that is representative of the community
- » Keeping a complex set of relationships with stakeholders positive and productive
- » Increasing resident involvement
- » Engaging youth
- » Lack of full capacity to manage and coordinate the LLP
- » LLP coordinator's challenge to provide leadership while also remaining flexible and responsive to suggested changes in structure and approach of LLP
- » Building a sustainable LLP
- » Working collaboratively in a community accustomed to conducting research in isolation from other work and social change efforts
- » Integrating work with and building cooperation among other local data warehouse initiatives
- » Gaining local investment from partners who gather, analyze and disseminate data in ways different from those of LLP
- » Consolidating university support at upper administrative level
- » Lack of qualified community based researchers who are representative of the community and willing to follow the guidance and expertise of residents
- » Continually expanding the circle of those connected to the LLP
- » Defining roles and responsibilities of the LLP and LLP partners
- » Lack of autonomy for LLP (clearly defined goals and expectations from the Foundation would help LLP to develop consistent structure and procedures that would enable LLP to be more effective at developing partnerships)
- » Building trust between diverse people, organizations and communities
- » Overtaxing residents as volunteers
- » Changes in neighborhood representation and leadership
- » Staff turnover at partner agencies

Strategic Planning for LLP
- » Enculturating LLP with vision of connecting people with data for positive change
- » Reconciling LLP methodologies and research philosophy with resident input and the Foundation mandates for the delivery of data and projections for social change
- » Creating a resident led learning agenda without maps and guidelines on how to do so
- » Selecting meaningful data projects without significant input from residents
- » Balancing the need to develop relationships and build LLP with the need to develop products
- » Lack of clarity from the Foundation about LLP specifications and directions makes it difficult to convey LLP work to partners clearly and concisely
- » Establishing means to create an agenda for the LLP

Data Collection and Use
- » Aligning data collection work across the site activities and LLP activities
- » Establishing means for interpreting results
- » Strengthening the dissemination of information to all sectors and members of community

Evaluation/Tracking Results

» Developing a broad and internalized outcomes framework premised on community vision

Operations

» Remaining flexible enough to take advantage of opportunities for collaboration while ensuring the timely implementation of fundamental elements of LLP
» Avoiding resident and LLP staff burnout
» Managing translation challenges
» Continuing to build financial capacity and resource networks needed to carry out LLP work

Public Awareness

» Helping agencies to see the benefit of LLP

Changes in Community

» Moving from resident learners to a learning community where learning models for adults, organizations and communities are merged into one model

HOW MAY THE LLP MODEL EVOLVE AS *MAKING CONNECTIONS* MOVES FORWARD?

Local Learning Partnerships should become more integrated with the *Making Connections* strategies in their sites over time. They are also being called upon to coordinate portions of the cross-site evaluation and to assist in local evaluation efforts. LLPs will need an expanded sets of skills, which they can acquire through their own reflections, forming a community of learners with other LLPs, and from stepped-up support and technical assistance from the Foundation.

Several LLP teams have formulated a vision for the future direction of their LLP. Coordinators reported the following elements of those visions:

LLPS ARE RESPONDING TO FOUNDATION PRIORITIES WHILE ALSO FORMING THEIR OWN LOCAL VISIONS OF HOW THEY MAY PROGRESS

TABLE 5. ELEMENTS OF VISIONS FOR LLPS

LLP Team
» Have fully representative and involved LLP leadership team
» Welcome community input
» Develop a framework for organizational self-assessment and learning
» Be fiscally self-sufficient and have long-term plan for sustainability

Data Collection and Use
» Have data resource center with electronic data warehouse
» Provide data to community groups for use in planning
» Produce regular meaningful reports re: status of the community
» Provide services for a fee
» Strive to make processes and products accessible to all

Evaluation/Tracking Results
» Work with others to develop shared community indicators and outcomes
» Empower community residents to use data for positive change
» Be the primary repository for tracking indicators over time
» Reinforce an outcomes framework in community planning efforts

Change in Community
» LLP work will encourage collaboration and strengthen existing and new efforts by groups and organizations to improve the lives of people in meaningful ways
» Broad institutional support for LLP work
» Neighborhood learning centers will be managed and governed by residents
» Large community constituents will be engaged in trainings, policy forums, collecting and sharing data and tool building
» Build a strong learning community with spirit of trust and mutual cooperation

Public Awareness
» Be the recognized source for all local data for all community residents and organizations
» All sectors of community will view LLP as a reliable, responsible and credible partner

CHAPTER 3: MIND SET AND SKILL SET NEEDED BY LOCAL LEARNING PARTNERSHIPS

QUICK OVERVIEW

The work of Local Learning Partnerships (LLPs) is significantly different than that of traditional research or data collection. LLP team members must embrace the *Making Connections* philosophy and goals and have a repertoire of skills and attitudes to carry them out.

The Foundation has identified the following elements of the mind set needed by LLP team members:

» **Belief in "democratizing" data**
» **Conviction that partnering is crucial in the short- and long-term**
» **Willingness to try new things**
» **Commitment to cultural competency**
» **Valuing relationships; building teams; building trust**
» **Creativity about how to "tell the story" in compelling, diverse ways**
» **Spirit of self-assessment, learning and improvement**

The Foundation has determined that LLP team members need skills to:

» **Manage the LLP role within a multifaceted arena**
» **Design and manage a flexible LLP structure and composition**
» **Integrate with the overall *Making Connections* site team**
» **Help develop, articulate, and guard the local theory of change**
» **Provide technical capacity for the collection, storage, analysis, and presentation of quantitative and qualitative data**
» **Effectively communicate data and results**
» **Envision and promote a "community of learning" around data**
» **Encourage diversified local investment, support and relationships to ensure sustainability**

Local Learning Partnerships are an essential element of the *Making Connections* initiative. As much as anyone involved in this effort to strengthen and connect families and transform tough neighborhoods, LLP team members need to understand, embrace and act on the philosophical underpinnings of *Making Connections*. Each LLP member needs to believe in the ability of communities to transform themselves—and to be committed to helping that happen.

LLPS MUST EMBRACE THE *MAKING CONNECTIONS* PHILOSOPHY

The work of LLPs is significantly different than that of traditional research or data collection. LLPs are part of learning and living different ways to think about data, collect them, and use them to advocate for change. LLPs are responsible for taking the mystery out of data and putting ownership of them in the hands of resi-

DATA ARE A COMMUNITY RESOURCE AND SHOULD NOT BE A MYSTERY TO RESIDENTS

dents. LLPs are challenged to form genuine partnerships with residents, and to make the shift from treating poor families as research objects to treating them as experts on their situation.

Through reflection, observing LLPs in operation, and the wisdom of hindsight after the first few years of *Making Connections*, the Foundation has identified some elements of the mind set and skill set that seem to exemplify how LLPs can best contribute to defining, producing, measuring, and communicating results from the overall family and neighborhood strengthening agenda.

Understanding these elements can help LLP team members determine areas in which they may want to do further learning, how they can put their strengths to greater use, or even whether they are well-suited to their role. In addition, as the Foundation and LLPs continue their long-term work, sharing common beliefs and expectations about the LLP outlook should accelerate learning and decrease confusion and misunderstandings.

WHAT LLP MIND SET COMPLEMENTS THE *MAKING CONNECTIONS* FRAMEWORK?

The following elements have emerged as crucial to the frame of mind of each partner in an LLP. Some people will have more experience in some elements, but everyone needs to be committed to them.

Belief in "democratizing" data. This means supporting the direct use of data by the people affected by them because you consider this a powerful step toward empowering people's ability to make change. It means knowing that information is community property — not to be hoarded by a few and doled out how and when they think it is appropriate. It means building the skills of residents and other stakeholders to strategically use data to achieve their goals. It does not mean setting aside your own training and experience and expertise, but it does mean making room for and placing equal value on the direct experience of those who live with the circumstances reflected by data and the decisions based on them.

Making Data Interesting, Relevant

" People need to understand how data is already used for planning purposes — for decisions that affect them. People need to know what numbers mean. Tell a story, make information into a narrative that is accessible and relevant to their lives. Data can help people understand their own reality in relationship to others. Information must be inspiring, be about positive change. "

Louis Mendoza, Former San Antonio LLP Coordinator

THE DESIRED OUTLOOK OF LLP MEMBERS CHALLENGES TRADITIONAL ROLES AND APPROACHES AROUND DATA

Using Information to Leverage Community Change

In Milwaukee, the LLP worked with HUD to map home foreclosures in the Making Connections neighborhood and found a doubling of foreclosures as a result of an increase in secondary or "predatory" lenders in the neighborhood over a five year period. A broad, city-wide coalition was able to leverage this information to make a strong case against predatory lending practices and to advocate for improving the financial services available to residents. Making Connections Milwaukee has partnered with a community bank that has a commitment to increasing the number of residents who use banks and have access to fair lending practices.

Conviction that partnering is crucial in the short- and long-term. This means knowing that people and organizations can or ought to work together to use data in ways to improve the well-being of children, families and neighborhoods. Collection of data needed to understand what is happening to and for families requires the cooperation and connection of a wide range of people. Creating and sustaining a permanent place for putting data together for the good of the community takes support from neighborhood groups, local government, community-based organizations, universities and foundations. Partnership means having an equal voice in decisions and shared responsibility — not just inviting limited input.

Willingness to try new things. *Making Connections* and LLPs are evolving as they go; there is no tidy road map. The Foundation has deliberately left room for LLPs to experiment with promising but unproven approaches. LLP partners can create a safe environment for learning to take place; provide encouragement for taking risks; be eager to celebrate successes and willing to recognize mistakes; and learn from what worked and what didn't.

Commitment to cultural competency. Every facet of LLP work is enhanced or diminished by the extent of cultural competence of those involved. Cultural competence means a set of academic and interpersonal skills that allows individuals to increase their understanding and appreciation of cultural differences and similarities within, among, and between groups. This requires a willingness and ability to draw on community-based values, traditions, and customs and to work with knowledgeable persons of and from the community.

Without cultural competence, LLP members are at risk of ignoring the potential negative effects of research on a community, interpreting data in a biased manner, or holding negative stereotypes of residents.

Each person is on a life-long continuum of developing cultural competence. Those who are at the early stages must understand their limitations, work with partners who already have the needed skills, and continually strive to increase their knowledge and skills.

Finding Mutually Beneficial Activities

The Oakland LLP will help support the work of the Eastside Arts Alliance (ESAA), and ESAA will help the LLP gather information for the Making Connections team to expand cultural activities. ESAA is a group of artists and community activists of color dedicated to community empowerment and building bridges between diverse communities in the Lower San Antonio district. It uses arts to help youth and adults share their own cultural traditions and innovations, learn the traditions of their neighbors, and use art to express their views on issues which affect their lives and the life of the community.

LLP Support for Arts and Culture Group and the ESAA Work Group

Culturally Appropriate Interviews

The interviewer selected to report on the learnings of two Seattle study circles comprised of participants of many ethnicities was a woman of color with expertise in grassroots participation and communities of color. Interviews allowed time for learning about the participants' history and background. Interviews were conducted at places chosen by the participants, and the use of a translator was offered.

Valuing relationships; building teams; building trust.
LLP partners need to make sure they are not living out the stereo-type of data nerds who prefer giving lectures to engaging in dialogue. LLP partners need to care about the people and the communities who are at the heart of *Making Connections*. They also need to encourage team building among the LLP members and between the LLP and the site team. Taking the time to find common ground, understand each other's strengths, and test whether people do what they say does not delay the "real" work — it is an integral part of the work. Initially, it may be more important to find ways for residents and researchers to work together than to ensure that strict conventional standards are applied to data collection and analysis.

Creativity about how to "tell the story" in compelling, diverse ways. Photo exhibits developed by community elders or the mapping of friendly neighborhood hangouts by youth may go further in meeting *Making Connections* goals than the best statistical analysis of hard data. A video may be more appealing and effective in advocating for change than a thick, well-footnoted report. LLPs shouldn't be looking for gimmicks just for the sake of doing some-thing different — but they should be thinking about a range of effective ways to get information out and to get it understood and used.

Spirit of self-assessment, learning and improvement.
LLPs need people who are confident enough to work in the muck of ambiguity while remaining humble enough to keep discovering what they don't know. LLPs need to check in on how they are doing, what insights they have gained, and how to make their work more effective. They also need to model this outlook and take a leadership role in encouraging and providing the tools for this approach within the overall *Making Connections* effort. They need to demonstrate that self-assessment illustrates caring more about the families and neighborhoods than about any temporary discom-fort or embarrassment because not everything turned out perfect-ly the first time around.

LLP team members who have the desire and ability to build rela-tionships and trust with a wide range of people, and to take some risks, are well-matched to this work.

Keeping Promises Builds Relationships

"*We helped produce the Making Connections bulletin as a communications bulletin after the Neighborhood Family Summits. It was the fulfillment of our assurance to residents that we would document their participation and expression of concerns. The bulletin was sent to all resident participants in the summits. The LLP provided reports, charts, maps, graphs, and photos from and about the summits.*"

Louis Mendoza, Former San Antonio LLP Coordinator

SELF-ASSESSMENT TAKES COURAGE AND CURIOSITY

WHAT LLP SKILL SET COMPLEMENTS THE *MAKING CONNECTIONS* FRAMEWORK?

In addition to holding the mind set described above, LLPs need a collection of skills to carry out their complex responsibilities. The abilities identified so far as being particularly important are described below. While the LLP coordinator may have somewhat greater or different responsibilities related to these skills, the need for the skills applies to all members of the LLP.

Manage the LLP role within a multifaceted arena.
This means that LLP team members need to understand and respond appropriately to the many groups to whom they owe varying types of allegiance and performance. This type of situation is sometimes called "matrix management," because for any situation, one may need to hold a picture of the different parties who have expectations of you on one axis and the types and levels of accountability on another axis. For example, an LLP team member working under a contract with the Foundation owes the Foundation fiscal and performance accountability. However, he or she may owe philosophical or strategic accountability to residents or to the overall *Making Connections* team. And the different parties may hold different expectations than the LLP team member has in mind.

As a result, LLP team members must often be thinking and acting in several realms simultaneously — and working to clarify and seek agreements for themselves, other LLP team members, and other parties about how those accountabilities play out.

Design and manage a flexible LLP structure and composition.
As noted earlier, the Foundation chose not to define a specific structure or composition for an LLP. Instead, LLPs are given the freedom to invent and reinvent whatever configuration they need to achieve their goals. They can choose informal or formal structures, shift the roles of team members, move toward empowerment of residents at varying paces, form partnerships, and seize opportunities.

LLPs are likely to modify their structure and composition over time, based on the evolution of *Making Connections*, their own

A SET OF INTERPERSONAL, MANAGEMENT, AND TECHNICAL SKILLS ARE NEEDED

LLPS ARE ACCOUNTABLE TO MANY — IN DIFFERENT WAYS

University-Led Team Taps Community Groups

The Hispanic Research Center (HRC) at the University of Texas–San Antonio was asked by the Foundation to start the LLP in San Antonio. HRC has expanded the LLP by tapping into personnel who are members of the Partners Group (the overall Making Connections team), including:

» Communities Organized for Public Service-Metro
» City of San Antonio
» United Way
» Family Economic Success — San Antonio

They plan to also add representation from:

» Alamo Area Community Information System
» Alamo Area Workforce Development
» Intercultural Development Research Association

Louis Mendoza, Former San Antonio LLP coordinator

development, and insights from what has or has not worked well for them. The first major shift related to enhancing skills required for evaluation.

LLP coordinators and team members may need to help one another consider the advantages and disadvantages of structural choices and to understand and adjust to changes. This should be part of the continuous learning process in which LLPs and the overall *Making Connections* team are engaged.

This freedom and flexibility require an ongoing attentiveness to the overall goals and underlying philosophy of *Making Connections* (including capacity building of residents and the racial, ethnic, culture, class and gender make-up of the team) — and to ongoing self-assessment of LLP work.

Integrate with the overall *Making Connections* site team.
While the LLP will function as a team among its own members, the LLP itself needs to be integrated with the overall *Making Connections* team in each site. The LLP is not an entity unto itself — it exists to support and further the overall *Making Connections* goals to strengthen families and connect them to a strong array of neighborhood resources.

This means that the LLP is providing information to help the *Making Connections* team select strategies for change; develop ideas of how to carry out that strategy; and track how those strategies are working. It also means the LLP is working to instill *Making Connections* beliefs such as democratizing data, resident leadership, and cultural competence in all of its work.

Integration requires that the site team draw on the expertise and focus of the LLP around data and results. If site teams pursue data activities independently of the LLPs, this lack of coordination can lead to confusion, duplication of effort, setting up competition among local data providers, and less effective results.

Creating this desired integration is a shared responsibility among the Foundation's site team leader, the Foundation's evaluation liaison, local coordinators, and LLP leaders. LLP coordinators and team members cannot do it by themselves, but they can encourage integration and act in ways that increase the likelihood of it occurring.

LLP STRUCTURE AND COMPOSITION WILL LIKELY SHIFT OVER TIME; THE FIRST MAJOR ADJUSTMENT RESPONDED TO INCREASED EXPECTATIONS AROUND EVALUATION

Helping Shape *Making Connections* Strategies

The Seattle LLP provided assistance to the Refugee Federation Service Center and the Khmer Association of Seattle and King County in designing interview questions for refugee and immigrant families living in White Center and in compiling the results. The 120 interviews were conducted to learn first hand refugees' and immigrants' perceptions of, concerns about, and hopes for the White Center Community; to feed this information into the planning process of the Making Connections initiative; and to increase the involvement of refugee and immigrant families in community planning and action in White Center.

White Center is My Second Homeland

LLPS ARE MOST EFFECTIVE WHEN THEY ARE STRONGLY INTEGRATED INTO THE SITE TEAM

LLP coordinators and team members were asked their perspective on the current relationship between the LLP and the site team. Coordinators indicated an alignment of views and a close working relationship to a greater degree than did team members.

FIGURE 9: RELATIONSHIP BETWEEN LLP AND LOCAL
SITE TEAM (COORDINATORS' RESPONSE)

- We have similar views and work together closely 59%
- Other 25%
- We have different views but work closely together 8%
- We have similar views but don't work together very closely 8%
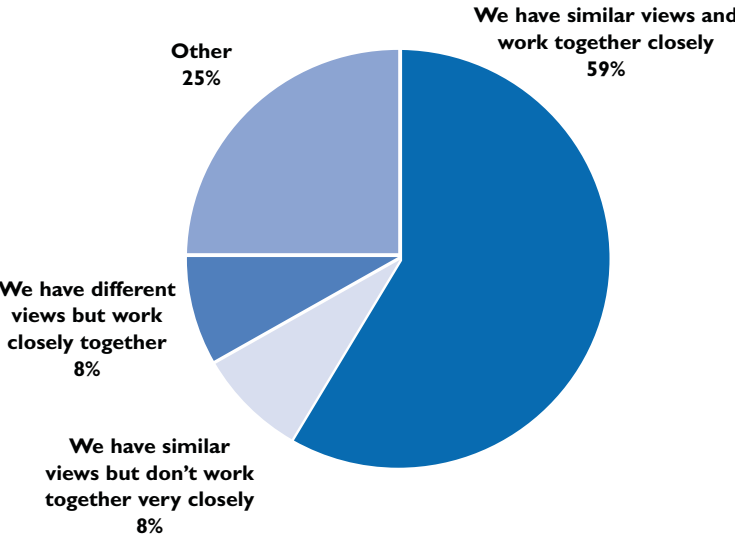
FIGURE 10: RELATIONSHIP BETWEEN LLP AND LOCAL
SITE TEAM (TEAM MEMBERS' RESPONSES)

- Other 20%
- I don't know if our views are different because we don't work closely together 7%
- We have different views and don't work closely together 9%
- We have different views but work closely together 4%
- We have similar views but don't work together very closely 13%
- We have similar views and work together closely 47%
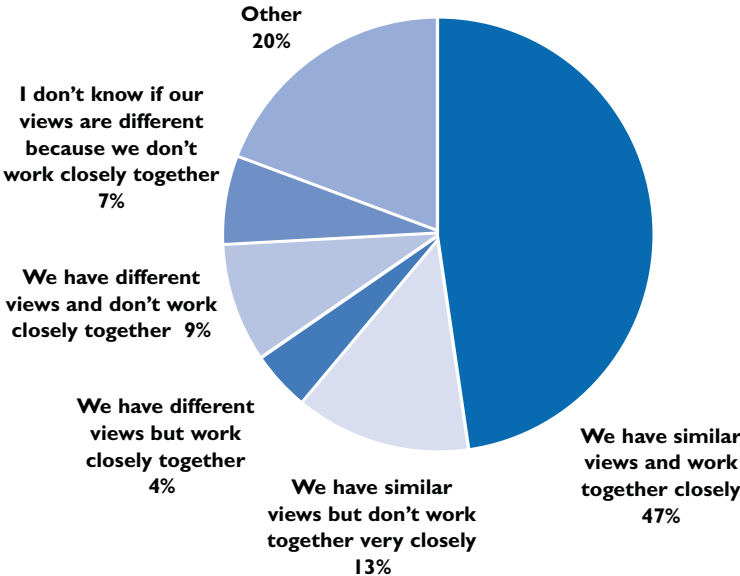
Help develop, articulate, and guard local theory of change.
The LLP coordinator and others on the LLP team need to con-
tribute to the theory of change for their site. They need to help
articulate why the site is pursuing certain strategies and how those
strategies are going to lead to better outcomes for children and
families. They must also protect the theory of change from casual
erosion or expansion, and ensure that any modifications or straying
from it are deliberate, reasonable and documented.

**Provide technical capacity for the collection, storage, analysis,
and presentation of quantitative and qualitative data.** The
technical data skills of each LLP are clearly important. However,
unless those abilities are put to work in ways that are consistent
with the *Making Connections* and LLP approaches, they are not
valuable and can even be counter-productive. The goal is to find
people who have both the specialized skills and the desired mind
set — which includes a willingness to share their expertise to build
capacity in residents over time.

Specific technical skills needed include the abilities to:

» Identify data sources and how to plug gaps in data from
various sources

» Compile and manage quantitative data for community use.

» Compile and manage qualitative data for community use.

» Play a leadership role in applying data to the advancement of
a family strengthening agenda

» Understand and help others understand evaluation

» Provide technical expertise to community members and
respond to neighborhoods' data interests

By ensuring a mix on the LLP team of people who represent the
types of people who live in *Making Connections* communities, and
by involving residents, LLPs are likely to naturally find nontraditional
ways to make data collection and analysis useful and engaging to a
wide range of audiences — while still ensuring products are solid
and credible.

Effectively communicate data and results. To ensure the use
and understanding of activities and projects of LLPs, team members
must be able to communicate both simple and complex informa-

**Discovering Skills in
Residents**

*Mattie Holliday and Val Tate, of the
Greater Citizens Coalition of
Martindale-Brightwood, helped
residents in Indianapolis create
and implement an innovative,
community-driven community
assets building survey in two
neighborhoods. The easy-to-read,
colorful brochures with the results
were titled "Knowledge is Power"
and featured the "Chart of
Concerns" and the "Chart
of Dreams."*

TECHNICAL SKILLS MUST BE
APPLIED IN A MANNER THAT
FURTHERS *MAKING
CONNECTIONS* PRINCIPLES

Evaluators Lead Seattle LLP

*The Seattle LLP is coordinated by
an organization of evaluators. They
have skills to teach how to use
data strategically.*

tion in ways that work for their varied audiences. Some LLPs may have this expertise within their teams; others may seek help from communications experts or by asking representatives of the intended audience what would work for them.

Envision and promote a "community of learning" around data. LLP leaders and team members can bring to their communities the opportunity to use data in more powerful and creative ways to reach community goals. To make the most of using data strategically, each LLP should demonstrate and practice bringing people with common interests together to examine what's working and what's not and how to keep examining and adjusting their techniques to achieve the desired results. Creating a learning community requires taking leadership among the *Making Connections* players, as well as involving residents.

p. 16, 56

In their self-assessment forms, LLPs indicated some involvement in activities related to developing a community of learning, such as developing their site's theory of change. They reported somewhat less activity around assessment of LLP operations and impact.

Assessing What Worked, What Didn't

The Dudley-Area Agency Technology Survey Final Report, prepared by Youthbuild-Boston, listed successes for the survey project, as well as challenges. For example, staff noted that the six youth hired responded very well to the frustrations and challenges of the project and that the large turnout for the technology breakfast confirmed the interest of agencies in getting more assistance and working collectively to address technology issues. They also concluded that their timetable was unrealistically short and they were overly ambitious in the scope and target number of completed surveys to be included.

TABLE 6. COMMUNICATION OF DATA AND RESULTS (SELF-ASSESSMENT OF LLP)

(0=no   1=somewhat   2=yes)

Question	Average (N=10)
Is the LLP conducting or planning to conduct self-assessment of LLP operations and impact?	0.65
Is the LLP helping to initiate and advance the development of a locally-generated framework, strategy, or theory of change for *Making Connections*?	1.2
Does the LLP have a plan to monitor and assess its own benchmarks, outcomes, and impacts?	0.8

p. 121

Encourage diversified local investment, support and relationships to ensure sustainability. The vision for LLPs includes local ownership of an ongoing entity that supports the efforts of residents and local stakeholders to use data to improve their families and community. In order to develop local ownership, LLPs need to partner from the beginning with existing data efforts, invite in other parties who have a stake in the strategic use of data, and foster relationships among those parties.

This approach is not only effective in the short-term, it begins to build local interest that can extend beyond the limits of Foundation funding and support.

Local Learning Partnerships need the technical skills that accompany good data collection and analysis — and they need those skills to be coupled with the ability to support their site's overall *Making Connections* strategies while operating in a complex environment.

EARLY THINKING ABOUT SUSTAINING LLP FUNCTIONS CAN HELP IDENTIFY ADDITIONAL RESOURCES AND PARTNERSHIPS

CHAPTER 4: ISSUES THAT CUT ACROSS ALL TYPES OF DATA ACTIVITIES

QUICK OVERVIEW

Six issues or topics have cross-cutting significance to the following five important areas of activity for Local Learning Partnerships (LLPs):

1. **Using data strategically**
2. **Quantitative data and building a data warehouse**
3. **Qualitative data**
4. **Process documentation**
5. **Evaluation**

The six cross-cutting topics are:

1. **Resident involvement, including youth**
2. **Addressing issues of race, ethnicity, culture, class and gender**
3. **Balancing information on problems with that on strengths**
4. **Integrating quantitative and qualitative data**
5. **Getting information out to people in inventive ways**
6. **Effecting change through LLP work**

Resident involvement encompasses a range of ways to ensure that people who live in communities take part in activities and decisions that affect their lives. Without careful attention to race, ethnicity, culture, class and gender, LLPs cannot get accurate data nor connect with and serve residents in _Making Connections_ neighborhoods.

Considering both strengths and problems provides a more complete and accurate picture of any person, family, organization or community.

A mix of quantitative and qualitative data provides more depth of analysis and suggests to a greater degree what action might be warranted. Getting information out effectively means providing data in engaging, interesting, useful ways for the desired audiences.

LLPs are responsible for creating change, as well as defining and measuring it.

The five chapters following this one address five of the important activities related to data that Local Learning Partnerships will address:

1. Using data strategically

2. Quantitative data and building a data warehouse

3. Qualitative data

4. Process documentation

5. Evaluation

As noted earlier, the first four LLP activities must now be considered in terms of how they contribute to LLP roles in evaluation of *Making Connections* work. The table below depicts that relationship.

Major LLP Activities

LLP roles in evaluation	Using data strategically	Local data warehouse/ quantitative data	Qualitative data	Documenting process & change
Development of outcomes, measures and strategies for achieving results	●	●	●	●
Local and cross-site evaluation		●	●	●
Creating a learning community	●			●

ENGAGING RESIDENTS

Each of the five activities has unique characteristics and relevance for LLPs. In addition, there are a number of issues or topics that cut across all of these data activities. This chapter brings the latter category together up front to emphasize the factors that need to permeate each type of data work. These cross-cutting issues must also be considered in terms of their relevance and importance in evaluation-oriented activities.

SEVERAL ISSUES NEED CONSIDERATION ACROSS ALL DATA ACTIVITIES

Simple definitions for each category are provided here, along with references to where in this Guidebook you will find more information about each topic.

Using data strategically means using it to change things. For *Making Connections*, this means changing things to improve well-being outcomes of children in tough neighborhoods. It means using data to contribute to better solutions to real problems.

p. 81

A **data warehouse** is a comprehensive, integrated database of neighborhood-level information that will be accessible to communities.

Quantitative data pertains to numeric information that answers the questions how much or how many; it is also referred to as statistical data or hard data. Quantitative data is designed to be statistically reliable.

Qualitative data pertains to narrative information, observations, opinions, and beliefs about a given topic. Qualitative data can give an in-depth understanding of why people hold particular views or how they make judgments, but it is not intended to be statistically reliable. However, if participants are broadly representative, findings can be strongly indicative of the population as a whole and have a strong analytical value.

Process documentation means to write down or record in an analytical way a process that is going on. It describes how and why something happened, rather than just describing what happened.

Evaluation means a systematic effort to describe, analyze, and provide objective information about how well a program or initiative is working.

The five data activities themselves are interrelated, as will be seen in the following chapters. A data warehouse may emphasize quantitative data, but also include qualitative data. Using quantitative and qualitative data together may provide a fuller or more persuasive picture. Process documentation primarily uses qualitative data collection methods. Evaluation requires use of quantitative and qualitative data, as well as process documentation.

The cross-cutting issues among those five activities which are addressed in this chapter are:

1. Resident involvement, including youth

SIX ISSUES NEED TO BE CONSIDERED IN ALL LLP ACTIVITIES

2. Addressing issues of race, ethnicity, culture, class, gender and power

3. Balancing information on problems with that on strengths

4. Integrating quantitative and qualitative data

5. Getting information out to people in inventive ways

6. Effecting change through LLP work

This chapter provides, for each issue, a basic definition and description; a statement of why the topic is important for *Making Connections*; the desired results; some examples from sites; and, in many cases, information on how sites are addressing these issues.

1. RESIDENT INVOLVEMENT, INCLUDING YOUTH

Resident involvement or engagement is a term used to describe a range of ways in which young people and adults who live in communities take part in activities and decisions that affect what happens in their lives and neighborhoods. Residents are engaged when they are actively enlisted and feel compelled, motivated and inspired to participate in addressing issues and concerns of importance to their communities. Names given to some of these approaches include community-based research, community organizing, outreach activities, family leadership development, and family-friendly places where families get connected to supportive networks. Some of these approaches are well-suited to the roles of Local Learning Partnerships; others are more likely to be used within the overall strategies of a *Making Connections* site.

Because *Making Connections* is dedicated to having families play a lead role in transforming their own lives and their own neighborhoods, resident involvement needs to occur within Local Learning Partnerships as well as within the overall site team. This approach is in contrast to the common pattern where research is performed and policy, funding, and service decisions are made with little or no meaningful voice or role from people who will be affected by those decisions.

An LLP which maximizes resident engagement would exhibit all or most of the following characteristics:

RESIDENT INVOLVEMENT ENCOMPASSES A RANGE OF TECHNIQUES FOR ENSURING THAT PEOPLE WHO LIVE IN COMMUNITIES TAKE PART IN ACTIVITIES AND DECISIONS THAT AFFECT THEIR LIVES

Working with Residents Requires Trust to Search Together

"*Working with residents in this way taxes us to be other than we have been trained to be, to build on trust rather than on skill or experience, to find our way in the dark. The challenge is going into the unknown with no answers, searching together, having to become comfortable with the unknown. There is no road map, no job description, nothing to tell us what to do or how to do it.*"

Terri Bailey, Denver LLP coordinator

» All Foundation and local people involved with the LLP understand that engaging residents requires a long-term commitment and mutual participation in the dynamics of power and influence – and are able to think and act from that framework. They have reflected on their own perceptions and biases about the skills and strengths of residents and overcome current thinking and attitudes that prevent their belief in the capacities of families.

» Awareness and resources are available to allow residents to participate in meaningful ways, including logistical supports such as child care, translation services, transportation, and economic compensation.

» Community members are well-represented on LLP teams.

» Youth and adult residents are involved in gathering, analyzing, and disseminating qualitative and quantitative data, focusing on how they could strategically use this information to improve the lives of neighborhood families.

» Residents assist in documenting the *Making Connections* process and in reflecting on what's learned from documentation and what adjustments may be needed.

» Residents help identify desired outcomes and are involved in tracking progress toward them.

Building capacity of residents to use information. To engage residents in a Local Learning Partnership or other projects using data, a purposeful effort to build their interest and skills may be needed. While training may seem like the obvious answer, the Piton Foundation in Denver relies on a whole series of steps that precede training: building a trusted reputation in the community, recruiting participants, and training them in key areas such as meeting management and conflict resolution. Then training in the strategic use of information is provided. After the training, further supports follow: additional training in areas such as public speaking, as well as coaching and encouragement through their first few difficult attempts to actually use information in their own community-building efforts.

Membership on LLP teams. For LLPs, resident engagement includes having community members on the LLP team. An LLP benefits from a collection of people who can contribute their diverse insights and creativity to produce new knowledge that

BOTH RESIDENTS AND TRADITIONAL DATA PEOPLE NEED TRUST AND TRAINING TO WORK TOGETHER

leads to social change. Community members bring their real-life wisdom and experience and passion; credentialed experts bring tools and expertise in data collection and analysis.

Data experts need help in how to interact well with residents as peers and in how to communicate in jargon-free language.

As noted earlier, few LLPs have resident members at this time. Several are moving in that direction.

Data collection, analysis and dissemination for action. There are multiple roles and opportunities for residents, both those on the LLP and others, to get involved in finding, learning about and using data. Some of the approaches include:

Community-based research: This term (also called participatory research) refers to research conducted by, for, or with the participation of community members. It commonly uses a mixed team of community members and technical experts to seek and use data to address an issue of concern to the community. It integrates research, education, and action. Its distinguishing characteristics are (a) extensive collaboration between traditionally defined researchers and the community in each research stage; (b) a reciprocal educational process between the community and researchers; and (c) an emphasis on taking action on the issue under study.

Community-based research grew from community development work and the observation that achieving sustainable social change efforts requires community members to develop a sense of power and the skills to challenge oppression. It also arose from concerns about the inequitable relationship between those who created and dominated knowledge production (the researchers) and those being researched.

Community-based research requires shared power and control of decision-making rather than domination of the process by researchers. It is a way of working, rather than a specific research method. The methods used can be any combination of quantitative or qualitative approaches, and vary according to the needs of the specific project.

Engaging Youth More Difficult

"*Youth have been difficult to engage. They are frequently bored with adult process. Where we have been the most successful is engaging them in specific activities. But we haven't been as successful at engaging them in the broader learning community or even in creating and implementing a youth-specific learning agenda.*"

Terri Bailey, Denver LLP coordinator

COMMUNITY MEMBERS MAY BE THE MOST EFFECTIVE RESEARCHERS

Family Support Includes Using Data to Leverage Change

The family support field is moving toward a broader notion of family support to include families gaining access to information and using it to leverage change. This signals changes in the way programs and staff can support families, with strategies such as:
» Families working together toward collective goals
» Families building their capacity to get and use data
» Families deciding the means by which information about families is gathered, used, and disseminated – a task traditionally controlled by professionals

Learning from Families by M. Elena Lopez, The Evaluation Exchange, Vol. VIII, No. 1 Spring 2002

Reasonable expectations of community members in community-based research include:

» Respect
» Equal partnership, including financially
» Technical assistance
» Job opportunities
» Training
» Collaboration in publications

Outreach strategies: This term means any of a variety of ways to invite or encourage families to begin or deepen their engagement with other neighbors or activities. How outreach is done depends on who lives in a community, the purpose of the outreach, and who is doing it. Outreach is designed to create a context where ordinary residents believe their voices and opinions matter — and to demonstrate their ability to impact their own well-being and future.

Study circles, used in several *Making Connections* sites, can begin a community dialogue and create a space where resident voices are honored. These small groups (also called story circles, family circles, and neighborhood circles) have facilitated discussions looking at how specific issues affect neighbors, and how they might tackle the issues together.

Photo exhibits and recording stories can serve as ways to involve residents collectively in a project where their voice matters. In addition, they offer non-traditional and perhaps more compelling ways to present data to larger audiences.

Other outreach techniques used by LLPs include family suppers, walking tours with places of interest identified through youth inter-views with residents, and individual interviews.

Community mapping: This is a technique for on-the-ground cata-loging of neighborhood strengths or problems. It involves individu-als walking their streets and sidewalks to identify and record the presence or absence of various conditions – from healthy hang-outs for youth to abandoned houses to individual talents of resi-dents. Community mapping can be as low-tech as a pencil and a clipboard, or as high-tech as wearable global positioning system

Community-Based Research by LLP's

Community-based research approaches being used by LLPs include the neighborhood asset surveys conducted by a grassroots organization in Indianapolis and the assessment of technology needs commissioned by the all-resident Denver LLP.

OUTREACH MEANS TO INVITE OR ENCOURAGE FAMILIES TO BEGIN OR DEEPEN THEIR ENGAGEMENT

Listening Encourages Residents

" I was terrified to get up and speak at first, but then I found myself doing it and people were listening. Then I began to get confidence in myself and be able to say some of the other things I was thinking. "

Seattle study circle participant

COMMUNITY MAPPING INVOLVES WALKING A NEIGHBORHOOD TO RECORD RESOURCES OR PROBLEMS THAT DON'T SHOW UP IN OTHER DATA SOURCES

(GPS) computers. The mapping process not only provides valuable information about a neighborhood that is not captured by existing data, it can be a profound experience for many of the mappers who become motivated to become involved in projects addressing what they find. Youth have conducted or assisted in mapping efforts in a number of communities.

Process documentation and evaluation. The principles outlined above regarding data collection, analysis, and use for social change also apply to resident involvement in process documentation and evaluation.

Challenges in resident engagement. As with any effort to build bridges across cultures or types of individuals or backgrounds, effective resident involvement offers significant challenges. LLP's should anticipate and seek to minimize potential barriers, such as:

» Fear and mistrust of Foundation intentions or those of others involved in *Making Connections* sites.

» The "deficit mentality" that develops internally and externally in distressed neighborhoods where families must show deficits to receive needed resources.

» Paternalistic attitudes by traditional researchers.

» Competing groups of residents.

» Neighborhood and community-based organizations acting as gatekeepers and limiting access to individual residents.

» Token representation.

» Too many meetings without concrete results.

» Unreasonable demands on residents' time and a lack of attention and support for their personal and family needs.

» Logistical and technological barriers to participation (lack of fax or e-mail; need for special physical supports, etc.).

» Reliance on professional jargon during meetings.

On average, LLPs reported moderate progress on resident involvement at this stage of their development.

Building Relationships First

" *It helped that we gave child care support, dinner, carpooling – and had staff support on logistics that freed us up to do substantive thinking and resources for training. We realized we needed to build relationships first; our story circles helped with this. We needed to know people's life experiences and their community work – the deeper, more human part of what it takes to have relationships. And celebrating success is so important – it makes it fun.* "

Candace RedShirt, Resident staff of Denver LLP

Factors that Interfere with Resident Engagement

In the Dudley Community in Boston, residents identified challenges to resident engagement, including:

» Complexities of cultural diversity and of competing demands interfere with involving seniors and parents in community planning

» Professional jargon and other unfriendly aspects of attending meetings interfered with their willingness to stay involved

» Youth are quite alienated from adults in the neighborhood

Inclusion of Family Perspectives

TABLE 7. RESIDENT INVOLVEMENT (SELF-ASSESSMENT OF LLP)

(0=no   1=somewhat   2=yes)

Question	Average (N=10)
Does the LLP include community members in its structure or operations?	1
Do community members review LLP products and proposals for work?	1.1
Does the LLP help a local constituency to use data?	1.2
Does the LLP involve residents in the collection, analysis, presentation, or dissemination of the data?	0.9
Is the LLP helping to build the capacity of community residents to use and understand data or to "ask" questions regarding data?	1.15
Are youth involved in the collection and strategic use of data?	0.45
Are youth involved directly in the LLP?	0.4
Are residents and other stakeholders involved in the development of a framework for qualitative data collection?	1
Is the agenda or framework for qualitative data collection designed to help advance the development of a neighborhood-based family strengthening movement?	1.3

2. ADDRESSING ISSUES OF RACE, ETHNICITY, CULTURE, CLASS, GENDER AND POWER

Activities to gather and analyze data or to interact in communities anywhere in the U.S. require cognizance of the differences among the dominant white male culture and that of marginalized cultures. Groups are discriminated against or excluded in data gathering and analysis on the basis of differences including race, ethnicity, culture, class, gender, and power – among other things. For purposes of this guidebook, we define those terms as:

Race – a socially defined population that is derived from distinguishable physical traits that are genetically transmitted. Race is a social concept, not a biological one.

Ethnicity – a population subgroup having a common cultural

heritage and/or derivation. The group is often linked by race, nationality, and language.

Culture – includes the shared values, traditions, norms, customs, arts, history, folklore, and institutions of a group of people who are commonly unified by race, ethnicity, language, nationality, or religion. Culture shapes how people see their world and structure their community and family life. Culture usually refers to powerful influences of social interaction passed down through generations, but can also refer to weaker ties such as those among people of a certain industry, age group, sexual orientation or political leaning.

Class –a group of people considered as a unit according to economic, occupational, or social status.

Gender – the condition of being a male or female, especially with regard to how this affects or determines a person's self-image, social status, goals, etc. In addition, transgender individuals have the biological body of one gender, but the behavior, clothing or physical appearance generally associated with the other gender.

Recognizing, understanding, respecting and attending to the differences among various groups living in *Making Connections* neighborhoods – particularly those differences which affect oppression and empowerment – is crucial to every form of connectedness within this initiative. Failure to address the social and cultural context of this work can result in considerable harm to individuals and communities, as well as failing to meeting the goals of *Making Connections*. Furthermore, without adequate attentiveness to cultural differences, LLPs will not understand what they are learning, they will not be able to engage residents in meaningful ways, and they will not empower families and neighborhoods.

Marginalized groups have many concerns in regard to data and research. LLP's should be aware of, and seek to avoid repeating, mistakes or exacerbating concerns which include the following:

» Power imbalances, lack of trust, and communication difficulties impede collaboration.

» Researchers or evaluators are collecting data on what they have never experienced and can never experience.

Research Has Been Used to Reinforce Traditional Power and Status

"*The research process in this country traditionally has included methods of observation, criteria for validating facts and theories that intentionally or unintentionally have been designed to justify preconceived ideas and stereotypes of people of color, and consequently, have reinforced in our society, traditional patterns of power, status and privilege.* " *(Hixson, 1993)*

Aida L. Giachello, Ph.D., Midwest Latino Health Resource Training and Policy Center, University of Illinois

WITHOUT CAREFUL ATTENTION TO RACE, ETHNICITY, CULTURE, CLASS AND GENDER, LLPS CANNOT GET ACCURATE DATA NOR CONNECT WITH RESIDENTS IN *MAKING CONNECTIONS* NEIGHBORHOODS

Diverse LLP Membership in Boston

"*Our LLP membership is quite diverse. The Dudley community and, increasingly, Boston, is multicultural and multi-racial. Our LLP includes a woman who is half Cape Verdean and half African American; someone of Puerto Rican heritage who grew up in the community; a Cuban American and African Americans, as well as a number of whites. We need to grapple more with these issues, and people are willing to work on it.* "

Charlotte Kahn, Boston LLP Coordinator

» Most research has been done by researchers who either belong to the middle class or who have a middle class mentality or framework in conducting research.

» Race, culture, class or gender biases or variables are not explored or incorporated into a theory, analysis or interpretation of the data.

» Researchers have sometimes not been honest about their agendas in communities and have purposefully withheld information.

» People of color are arbitrarily excluded from studies because of financial constraints, inconvenience to the research team, language barriers, or lack of familiarity.

» Research reinforces negative stereotypes of communities and further stigmatizes poor and/or minority communities.

» Research on marginalized groups tends to emphasize genetic and cultural factors as solely responsible for well-being, and ignores socioeconomic, political and environmental influences.

» Research can be "scientific," but it can also be political, racist, or classicist.

» The quality of data collected may be questionable and may not mean what respondents mean, especially when researchers and respondents are of different cultures.

» In some cultures, interviews are an intrusive process that can negatively affect a resident and his/her family members by causing embarrassment, distress, or loss of face.

» Power imbalances exist between communities and institutions, people of color and white people, women and men, project staff and principal investigators, and on many overlapping levels. Critical factors in power imbalances are control of funding for the project and the location of administrative oversight.

» There is a lack of tangible benefits for community members and communities as a whole from participation in research; most of the benefits accrue to researchers and their institutions.

» Community members do not learn the results of research that is carried out in their community.

MARGINALIZED GROUPS HAVE MANY REASONS TO DISTRUST MAINSTREAM DATA AND RESEARCH

A Local Learning Partnership which is responsibly addressing issues of race, ethnicity, culture, class, gender and power would exhibit all or most of the following characteristics:

» Include members who represent the racial, ethnic, cultural, class and gender make-up of the *Making Connections* neighborhoods.

» Be mindful of different world views and cultural experiences of community members.

» Acknowledge the history of sometimes exploitive relationships between researchers and communities, particularly communities of color.

» Approach data collection and interpretation with a "beginner's mind," without preconceptions or judgments.

» Involve community members from the beginning in setting research priorities and designs.

» Use community participatory research models to include residents of the target communities in information gathering and analysis.

» Devote sufficient time, energy and resources to creating successful partnerships between residents and traditional data collectors.

» Include minority research centers or entities, where they exist, as part of the LLP team, to serve as an intermediary between community members and mainstream organizations, and to improve cross-cultural research methodology.

» Have or be working to improve their cultural competence.

» Share decision-making between institutions and community members.

» Report results of data collection back to those who were the subject of the information – in ways likely to reach community members.

HOW ARE LLPS ADDRESSING RACE, ETHNICITY, CULTURE, CLASS, GENDER AND POWER?

The survey asked coordinators about the extent to which people representative of the *Making Connections* neighborhood were involved in two types of LLP work:

LLPs Members of Same Culture as Community

"*We are from this culture. It is a natural fit for us. We can speak to people in Spanish and understand larger cultural frameworks, such as extended family, and formal and informal kinship networks in the community.*"

Louis Mendoza, Former San Antonio LLP Coordinator

Complexities of Translation

"*It's more than just generic language translation. We have really struggled with finding competent translators for our immigrant communities from rural Mexico and Central America. We developed a translation guide that governs all that gets translated. It includes choices of words, and how to translate difficult Making Connections concepts.*"

Terri Bailey, Denver LLP Coordinator

1. Doing the projects
2. Preparing results and disseminating them

In carrying out projects, coordinators reported considerable attention to these issues, while acknowledging the need for even better representation. In preparing and sharing products, results were more uneven, and highlighted a lack of knowledge as to whether any bias in data collection or analysis is being identified and reported.

Figures 11-13 reflect coordinators' perspectives of the frequency with which LLPs have employed each of the strategies below to take race and ethnicity, class, culture and gender into consideration when doing projects.

FIGURE 11: COMMUNITY MEMBERS REPRESENTING THE FOLLOWING GROUPS REVIEW PROPOSALS FOR WORK, QUESTIONNAIRES, INTERVIEW QUESTIONS AND OTHER DATA COLLECTION INSTRUMENTS FOR APPROPRIATENESS BEFORE THEY ARE USED
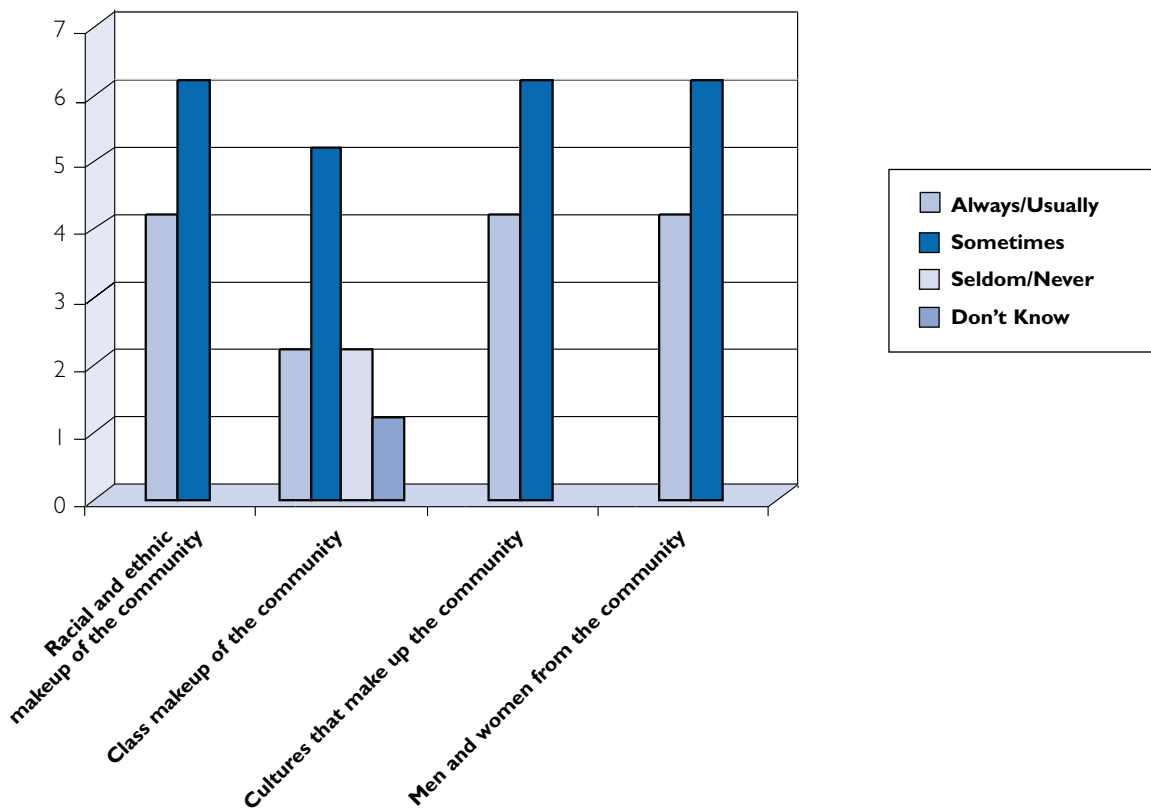
FIGURE 12: EXTENT TO WHICH DATA COLLECTION INSTRU-MENTS AND INTERVIEWS ARE REFLECTIVE OF COMMUNITY

FIGURE 12 legend:
- Always/Usually
- Sometimes
- Seldom/Never
- Don't Know

Categories:
- Translated into and conducted in languages spoken in the community
- Written to be accessible to people from all class backgrounds in the community and conducted by people of the same class as the interviewees
- Written with sensitivity to race and ethnicity and conducted by people of the same race or ethnicity as interviewees
- Written to speak to both men and women and conducted by people of the same gender as the interviewees

FIGURE 13: PEOPLE COLLECTING DATA MATCH THOSE FROM WHOM THEY ARE COLLECTING DATA

FIGURE 13 legend:
- Always/Usually
- Sometimes
- Seldom/Never
- Don't Know

Categories:
- For race and ethnicity
- For class
- For cultures
- For gender
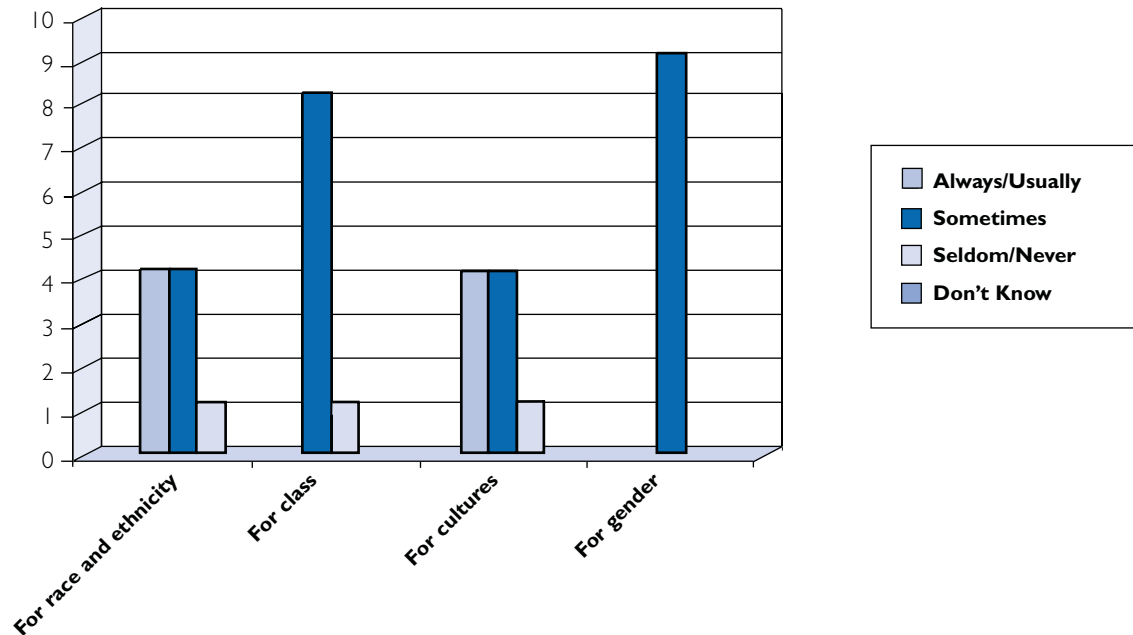
Figures 14-16 reflect coordinators' perspectives of the frequency with which LLPs used the strategies below to take race and ethnicity, class, culture and gender into consideration when putting together reports, presentations, etc. and sharing them with others.

FIGURE 14: COMMUNITY MEMBERS REPRESENTING THE FOLLOWING GROUPS REVIEW DRAFTS OF LLP PRODUCTS FOR APPROPRIATENESS BEFORE THEY ARE SHARED WITH OTHERS

Legend:
- Always/Usually
- Sometimes
- Seldom/Never
- Don't Know

Categories:
- Racial and ethnic makeup of the community
- Class makeup of the community
- Cultures that make up the community
- Women and men from the community
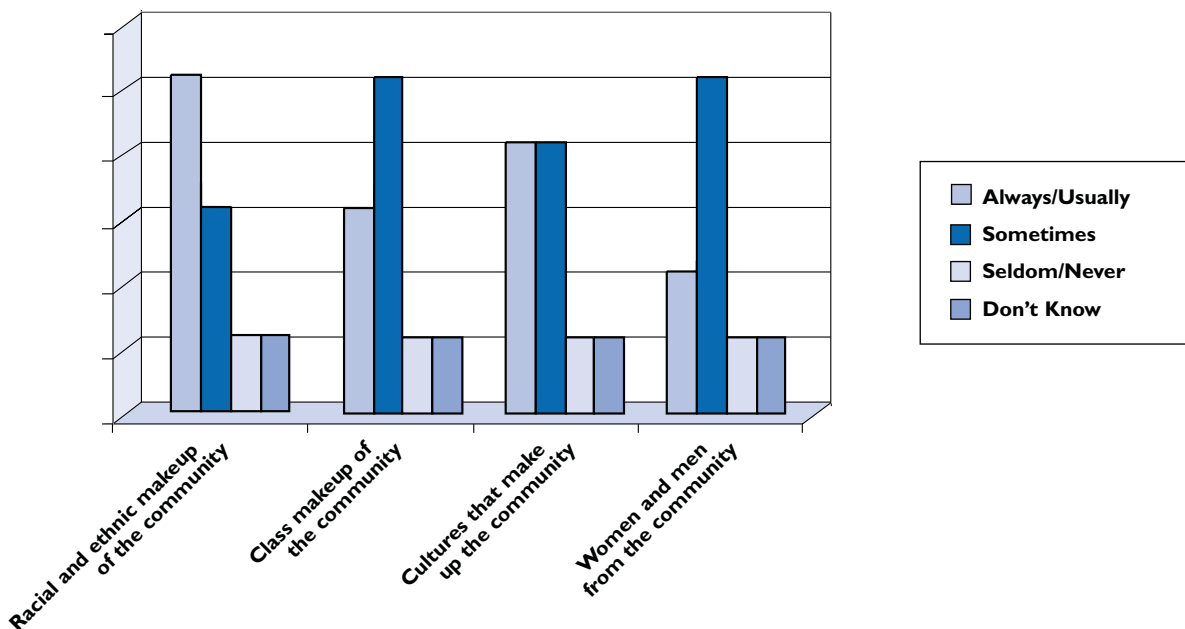
FIGURE 15: EXTENT TO WHICH BIAS IN DATA COLLECTION OR ANALYSIS IS CLEARLY STATED

Legend:
- Always/Usually
- Sometimes
- Seldom/Never
- Don't Know

Categories:
- Racial or ethnic bias
- Class bias
- Cultural bias
- Gender bias
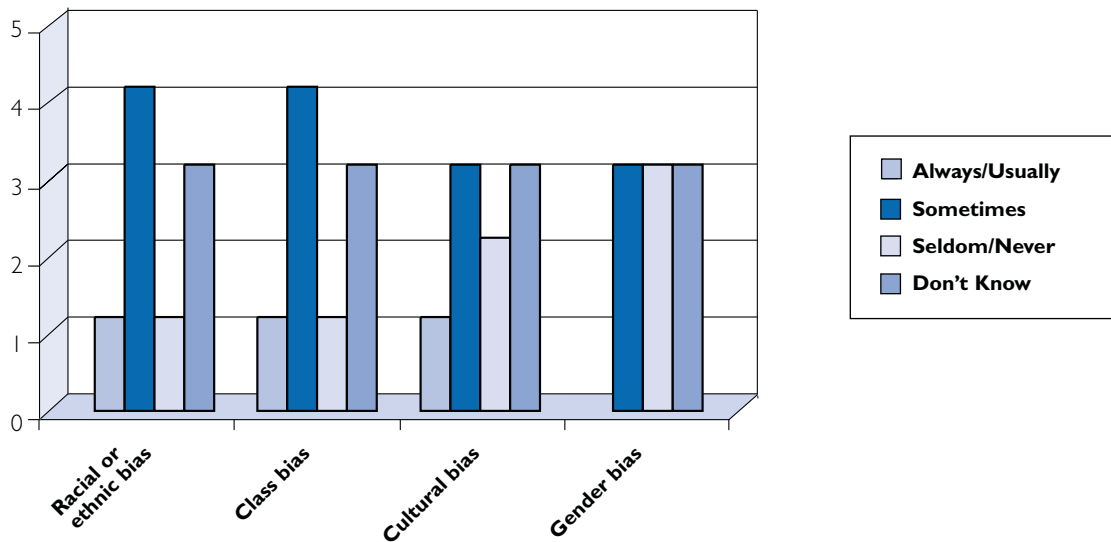
FIGURE 16: COMMUNITY MEMBERS REPRESENTING THE FOLLOWING GROUPS HELP DESIGN, PRODUCE AND DISTRIBUTE PRODUCTS
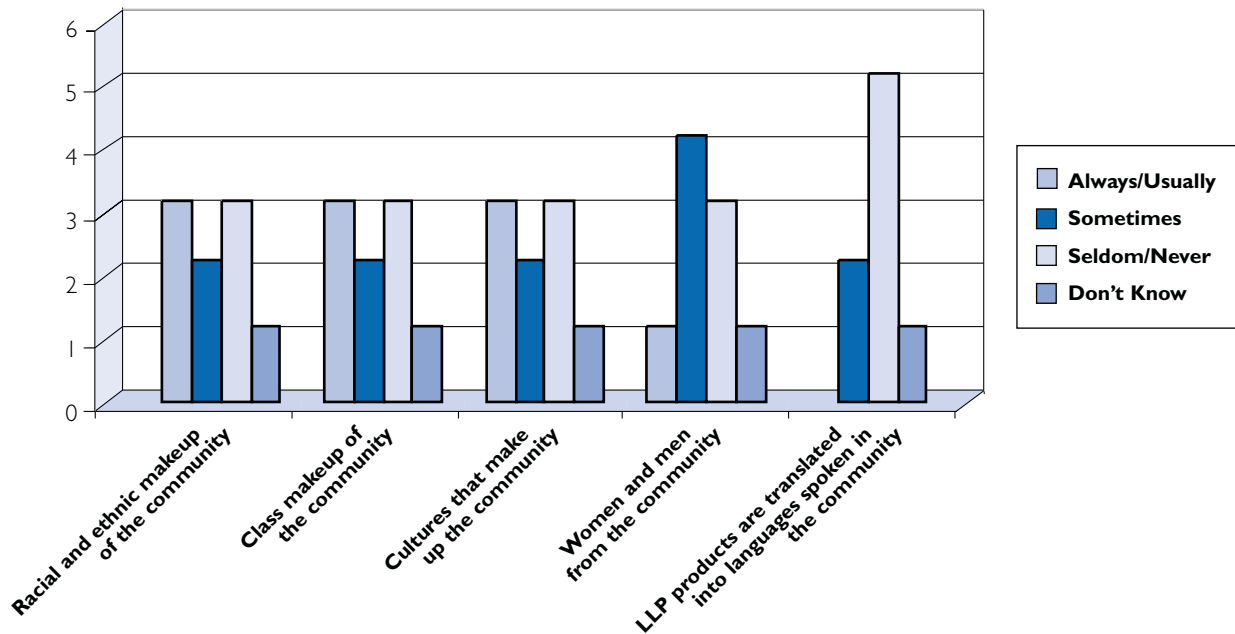
Coordinators and team members offered additional strategies they are using to take race and ethnicity, class, culture and gender into consideration in their work.

TABLE 8. ADDITIONAL STRATEGIES LLPS USE TO TAKE RACE AND ETHNICITY, CLASS, CULTURE AND GENDER INTO CONSIDERATION

» Written materials translated into native languages of residents.

» Community meetings conducted with interpreters as needed.

» Story circle project entirely designed and managed by residents has 40 trained resident facilitators from and representative of the neighborhoods.

» The LLP has criteria for all contract work requiring applicants to employ residents in the work and gives authority over data and publication to residents so publications can be reviewed, edited, and translated to be more culturally appropriate.

» Use arts and culture to deal with race/class/culture issues.

» LLP documentation team is multiracial and has represented different groups over time, including the different racial, ethnic and language groups.

» Focusing on the issue of POWER, which is an important issue in relation to race, gender, culture, etc. We have defined ourselves as working for the community planning group; they assist in and approve of the design, questions, and areas of documentation, and participate in the data collection. They also have complete control of the information about them that is produced and distributed.

» With regards to dissemination, our reports have become shorter and more focused, are more reader friendly.

» Community based organizations representing immigrant/isolated groups carry out data collection and help design collection instruments.

» Limitations in data collected (e.g. English-only surveys) are clearly stated.

» Easily accessible language and terminology is striven for but not always reached.

3. BALANCING INFORMATION ON PROBLEMS AND STRENGTHS

This topic addresses the need to include both negative and positive information about people and communities in data collection.

Problem or deficit data highlight perceived harmful or risky aspects of a person or community. They are the type of data most commonly captured through administrative records: crimes, teen pregnancies, dilapidated housing, infant mortality, single-parent households, unemployment, etc.

Strengths or assets data capture the gifts, abilities and resources of people, associations, institutions, and neighborhoods (a philosophy often associated with the work of John Kretzmann and John McKnight at the Asset-Based Community Development Institute within the Institute for Policy Research at Northwestern University www.northwestern.edu/ipr/abcd.html). These data are rarely found in administrative databases, and can only be obtained through interviews, surveys, community discussions, or mapping.

Examples of *individual* assets include having or being part of a personal support system, the ability to provide transportation, skills in caring for others, and leadership and advocacy experience. *Associations* include faith, youth, mutual support, neighborhood, political, and civic groups. They may offer concrete assets such as meeting places, communication linkages, and information. More

DATA ON PROBLEMS IS MUCH MORE READILY AVAILABLE THAN INFORMATION ON STRENGTHS

Identifying Assets of Businesses, Churches, Individuals

Neighborhood asset surveys in Indianapolis asked businesses if they would assist the community and what kind of donations they make to the community. They also asked churches how they would be willing to help families or neighborhood blocks. They inquired about the individual gifts residents will share with other residents, which included time, money, materials, skills, and talents.

importantly, they are a basic tool for empowering individuals, mobilizing their capacities, and amplifying their skills to build strong communities. Local *institutions* include parks, libraries, schools, colleges, police, and hospitals. They have resources such as materials and equipment, purchasing power, training, services, and volunteers.

Considering both strengths and weaknesses provides a more complete and accurate picture of any person, family, organization or community. Most efforts to improve tough urban neighborhoods begin by focusing on the needs, deficiencies and problems found there. These negative images convey part of the truth about the actual conditions of a troubled neighborhood – but they can become regarded as the whole truth. A more accurate picture is likely to surface when a variety of data is examined to see both strengths and problems of families and communities.

More importantly, a deficit-based outlook can have devastating effects on residents. They may begin to accept the list of problems as their reality; to see the only solutions to needs as coming from outside experts; and to view success as going no further than survival. Learning about the capacities of residents and neighborhoods can create greater local commitment for residents to invest in themselves and spotlight the resources they have to build upon.

LLPs should aim for a balance of problem and strength data that provide a realistic assessment of both. They should involve residents in identifying assets and using that information to inspire hope and reverse unduly gloomy pictures of their neighborhood. They should stay alert to the harm that can be caused by overuse of a deficit lens, and ensure adequate weight is given to asset data despite the difficulties in obtaining them.

Both LLP coordinators and team members indicated an awareness of the need for balance among strengths and problems, and reported considerable progress in that regard. Team members noted a better balance within qualitative data than within quantitative data.

Every Neighborhood has Resources

"For it is clear that even the poorest neighborhood is a place where individuals and organizations represent resources upon which to rebuild. The key to neighborhood regeneration, then, is to locate all of the available local assets, to begin connecting them with one another in ways that multiply their power and effectiveness, and to begin harnessing those local institutions that are not yet available for local development purposes."

John Kretzmann and John McKnight, Building Communities from the Inside Out

ONLY LOOKING AT PROBLEMS OVERLOOKS OPPORTUNITIES AND CAN DO MORE HARM THAN GOOD

TABLE 9. BALANCE BETWEEN DATA ON STRENGTHS AND DATA ON PROBLEMS (COORDINATORS' RESPONSES)

	# of Coordinators (N=10)
Working towards achieving and maintaining a balance over time	4
We have a balance of assets and problems data	2
LLP has not yet collected data	1
We are just beginning to collect data and plan to have a balance	1
We have collected demographic and other baseline data that we do not categorize as strengths or problems	1
We believe all data can be viewed as asset/strengths data or problem data, depending on the perspective	1
There is no way to assess overall what our balance between strengths data and problem data might be. Our perspective is that 'strengths' data are data that lead to or support action. 'Problem' data are data for which we don't have corresponding solutions or resources with which to tackle the problem.	1

TABLE 10. BALANCE BETWEEN COMMUNITY STRENGTHS AND PROBLEMS (TEAM MEMBERS' RESPONSES)

	Quantitative Data Collection	Qualitative Data Collection
No strengths; all problems	1	0
A few strengths; mostly problems	9	5
Equal balance of strengths and problems	13	12
Mostly strengths; a few problems	2	7
All strengths; no problems	0	1
Have not yet collected data	12	14
Don't know	7	5

4. INTEGRATING QUANTITATIVE AND QUALITATIVE DATA

This subject urges bringing together quantitative and qualitative data approaches to provide a more whole or unified picture of a topic.

For any topic, LLPs would want to think through and assemble data that would be most illuminating and convincing. In most cases, that will involve a mix of hard and soft data. For example, an LLP might begin with statistics on the current situation. Then it might look for data on trends in outcomes, but it would also want information that would help explain the changes that are taking place. An LLP might also want information on the attitudes of residents concerning the topic.

The mix of quantitative and qualitative data provides more depth of analysis and suggests to a greater degree what action might be warranted. Using a combination of data collection approaches will be particularly useful in the evaluation of *Making Connections*, as various facets of core outcomes will need to be explored and explained.

Using a mix of statistical information and personal views also helps offset the problem-centered bias in most administrative data. This approach often reveals that some data – either quantitative or qualitative – are inaccurate, incomplete, out-of-date, or biased in some way. When that occurs, those involved should work carefully to address discrepancies.

When collecting and sharing data, LLPs should aim for a mix of quantitative and qualitative information that will provide a complete enough picture to allow the data to be used strategically. LLPs should show how the two types of data strengthen and inform each other.

Quantitative Data Displayed by Resident Themes, Quotes

The first profile of the White Center neighborhood near Seattle presented quantitative data on the key themes identified through interviews with White Center residents. The quantitative data are organized to be responsive to subjects residents identified as important. The quantitative data are interspersed with quotes from the resident interviews.

A Profile of White Center

Undocumented Residents Not Included in Quantitative Data

"*White Center has lots of undocumented residents, and they do not show up in quantitative data. Qualitative data provides context and additional ways to understand and reach populations who won't appear in Census data.*"

Anne Gienapp, Seattle LLP Coordinator

A MORE ACCURATE AND COMPLETE PICTURE EMERGES WHEN QUALITATIVE AND QUANTITATIVE DATA ARE COMBINED

Data Types Complement One Another

"*The quantitative data has actually been helpful in affirming what people know on a qualitative level. It validates what people know on a gut level.*"

Charlotte Kahn, Boston LLP Coordinator

TABLE 11. INTEGRATING QUANTITATIVE AND QUALITATIVE DATA (SELF-ASSESSMENT OF LLP)

(0=no   1=somewhat   2=yes)

Question	Average (N=10)
Are quantitative and qualitative data collection, analysis, and research being conducted in an integrated way? (Are quantitative and qualitative data being used together to support each other?)	1

5. GETTING INFORMATION OUT TO PEOPLE IN EFFECTIVE WAYS

This topic calls attention to the need to use and develop a variety of ways in which to communicate data – beyond the traditional, somewhat dry reports in which information often comes packaged. Getting information out effectively for *Making Connections* means providing data in engaging, interesting, useful ways for the desired audiences. It means making use of communications and community expertise to tell the story of the residents and neighborhood in *Making Connections* sites. It means using ethnic language newspapers, videotapes, local radio, photo exhibits, interactive web sites or other forms of technology, stories, or community forums to share information that educates and motivates.

Finding new and effective ways to put data and information in the hands of residents and community organizations will further the *Making Connections* goal of elevating data as a powerful tool for change. People will not take in or use information that is not engaging or interesting to them. To bring data out of ivory towers and into the streets, LLPs need to move beyond thick printouts of statistics that are interesting only to people with careers based on data analysis.

Photos Engage Families

Over 5,000 people attended a photo exhibit in New Orleans celebrating all types of families, titled "The Ties That Bind: Making Family New Orleans Style." The exhibit was the occasion to launch Making Connections in New Orleans. The exhibit led to a series of family suppers convened around the concept of family – illustrating that art can be a direct link to community involvement.

COMMUNITY MEMBERS CAN'T EFFECTIVELY USE DATA UNTIL THEY UNDERSTAND WHAT THE INFORMATION MEANS

A Local Learning Partnership which is creatively disseminating data would exhibit all or most of the following characteristics:

» Residents provide ideas and guidance about how different groups in their community would be most likely to be interested in or make use of data.

» The team accesses expertise in culturally competent communications principles, within its members or elsewhere.

» Materials are designed to fit the language and culture of the intended audiences.

» Materials consider the cultural values and attitudes of the intended audiences, including such factors as whether primary importance is placed on the individual or the community; generally accepted roles for women, men, and children; the preferred family structure; and the relative importance of folk wisdom and common sense in comparison to "scientific" findings.

» A variety of means of communication are being tried and assessed.

» Residents pilot test and provide feedback on proposed materials or products.

» Distribution channels reach various targeted audiences.

» New technologies are being used while bridging the digital divide.

» Local media are engaged in reporting data and their significance to residents

The digital divide. The digital divide refers to the gap in access to technology between low-income communities and residents and those in the middle or upper classes. The digital divide means not only lacking computers and related information technology, but also being without access to telephones, photocopy or fax machines at affordable costs.

Closing the digital divide influences not only data use but also *Making Connections* outcomes, such as improved economic opportunities. LLPs need to devote attention to involving residents in the content of web sites or other technology routes for dissemination of data, to increasing access to technology, and in building residents' ability to use technology.

Digital Divide Latest in Historical Divides

"It's important. .to put [the digital divide] in the context of historical divides of race, class and income. What is new. .is the adjective 'digital' before the divide. .[A]nd this [new divide] is important because of the pervasiveness of the technology."

Junious Williams, Oakland LLP coordinator

THE DIGITAL DIVIDE HAS COMMUNICATIONS, ECONOMIC, AND CULTURAL DIMENSIONS

One Step Leads to Another for Technology Access

"We learned that there was a large population of low-income people who did not have access to technology. We involved residents in creating a web site with neighborhood data to bridge the digital divide. This created a larger concern about access, so we did an assessment to get a better idea of the need and to locate all the places people could access computers. This sparked an interest in creating computer centers in the community."

Candace RedShirt, Resident staff of Denver LLP

However, not all residents in tough neighborhoods may not see technology as a valuable tool. One participant at the 2001 LLP Conference described a local survey of community organizations that found 60 percent thought information technology was merely "a necessary evil."

LLP self-assessments indicate a limited attention overall to digital divide issues at this time.

TABLE 12. ADDRESSING THE DIGITAL DIVIDE (SELF-ASSESSMENT OF LLP)

(0=no   1=somewhat   2=yes)

Question	Average (N=10)
Is the LLP attempting to identify or address any digital divide in the community?	0.7

HOW ARE LLPS GETTING INFORMATION OUT IN DIFFERENT WAYS?

Self-assessment forms indicate moderate progress in producing useful and understandable products.

TABLE 13. DISSEMINATION OF INFORMATION (SELF-ASSESSMENT OF LLP)

(0=no   1=somewhat   2=yes

| Question	Average (N=10)
Is the LLP analyzing and disseminating data in formats that are understandable and useful to community?	0.9
Is the LLP producing and disseminating products that can be read and understood by a variety of audiences both in the community and other stakeholders?	1.1
Are multiple vehicles/methods/media being used to collect and disseminate qualitative data in the community?	0.6
Is the LLP working with or integrating communications strategies in its dissemination and work?	1

6. EFFECTING CHANGE THROUGH LLP WORK

Local Learning Partnerships have a role in effecting change in *Making Connections* sites through helping their sites develop target outcomes and strategies to achieve and measure them; building partnerships; promoting a place-based, family strengthening agenda; asking families to define what they need and want; building community capacity; addressing race, class and culture; and changing institutional policies.

The work of LLPs involves not only process and activities, but also results. As part of the *Making Connections* team, LLPs can and should contribute to the types of shifts in thinking and acting needed to connect families to opportunities, networks and services.

By intentionally thinking about how LLPs can contribute to these changes, they can plan tasks and activities to support the change process and desired results. In addition, by holding themselves accountable for results, LLPs can model continuous learning for other *Making Connections* groups.

p. 113

Just as the overall *Making Connections* teams are identifying principles and practices that will lead to their desired changes, LLPs need to spot catalytic opportunities in their work. Each LLP should articulate the type of changes on which it can have an effect and track its contributions to those changes.

Coordinators and team members identified a number of changes they have observed as a result of LLP work. Responses to this open-ended question varied widely, but are grouped around general categories of change LLPs are noticing.

LLPS ARE RESPONSIBLE FOR CREATING CHANGE, AS WELL AS DEFINING AND MEASURING IT

TABLE 14. CHANGES (COORDINATORS' RESPONSES)

Awareness and Knowledge
> » Greater recognition of importance of race and place in improving community outcomes
> » Community based organizations are more aware of data that are available
> » Increased understanding of how welfare policies and programs hinder individual and family advancement
> » Increased knowledge of community and technology
> » Increased awareness about eligibility for Earned Income Tax Credit
> » Individual transformation
> » Organizational transformation (institutionalization of the rules of engagement for the initiative)
> » Awareness of the possible potential and benefit of a community driven learning group
> » Residents have greater awareness of neighborhood history
> » Community based organizations have greater awareness of their technology needs and ways to address those needs by working collaboratively

Skills
> » Community based organizations are more knowledgeable about ways to analyze and use data
> » Community groups learning qualitative data collection techniques
> » Use of workforce and employment data to guide employment strategies

Activities/Collaboration
> » Greater sense of connectedness of the work of organizations and entities working on tough community problems
> » Neighborhood organizations have greater cohesion and more access to decision makers
> » More residents involved through neighborhood circles
> » Convening of large groups of residents to discuss neighborhood issues and potential positive solutions
> » Increased leadership in target area
> » Cross-neighborhood learning, relationships and familiarity with each others' work
> » New model for relationship between service-providing organizations and residents
> » Partners presenting data within the community's framework
> » Institutional partners are meeting with residents in neighborhood locations
> » Strengthening of neighborhood association
> » Increased involvement of residents in partners' planning processes

TABLE 15 . CHANGES (TEAM MEMBERS' RESPONSES)

	Total	Cohort 1 (n=12)	Cohort 2 (n=32)	TIS (n=6)
Awareness and Knowledge				
LLP partners have increased understanding of importance of using data and sharing data with residents	1		1	
Mutual respect and appreciation for capacity and specialized knowledge of all organizations in the community	1		1	
Increased awareness within and outside of the neighborhood that there are many stakeholders	1		1	
Increased awareness among residents of the power of using and sharing data	2			2
Families and organizations having increased knowledge of the neighborhood, their needs	4		4	
Community leaders becoming energized over idea of using data to inform their decisions	3	2	1	
People in the community are showing excitement about the project	1		1	
A new shared understanding among LLP partners of how to create real change in the community	1		1	
Acceptance by community of LLP role as organizer	1	1		
Increased enthusiasm among residents about setting and achieving their neighborhood transformation agendas	1	1		
Families changing their decision making patterns as a result of increased knowledge of community resources	1			1
Total	**17**	**4**	**9**	**4**
Skills				
Personal and professional development of residents who have been involved in LLP	1		1	
Increasing research skills of residents	1		1	
Residents have received computer training	1	1		
Total	**3**	**1**	**2**	**0**

	Total	Cohort 1 (n=12)	Cohort 2 (n=32)	TIS (n=6)
Activities/Collaboration				
Stronger networking between residents and organizations	1		1	
Data gathering and holding agencies have changed their mindset on sharing data	1		1	
Partners including each other on outside projects and sharing information and resources outside of their LLP work.	1		1	
Doing community-focused research, by the community, for the community	1		1	
Increased desire among LLP partners to support the work of other organizations in the community	1		1	
Community agencies have greater access to information	1		1	
Relationship building among agency members and data groups	1		1	
Strengthening of the network of community organizations (increased capacity for and appreciation for collaboration)	5		5	
Improved communication between neighbors	1	1		
Community based organizations using data to support grant applications	1		1	
Improved outreach strategies of local organizations	1		1	
Residents are engaged in the process	2			2
Total	**17**	**1**	**14**	**2**
Other				
No major changes yet	14		14	
Total	**14**	**0**	**14**	**0**

Cross-Cutting Issues

CHAPTER 5: USING DATA STRATEGICALLY

Using data strategically in *Making Connections* means employing data as a tool to improve social outcomes of children in tough neighborhoods. The ability of resident organizations and other groups to effect positive social change is frequently contingent upon sound information and analysis.

Data can contribute to effecting change by:

- » **Increasing understanding of conditions**
- » **Identifying needs**
- » **Spotting trends**
- » **Encouraging dialogue**
- » **Helping engage, mobilize and organize neighborhood residents**
- » **Broadening an agenda**
- » **Supporting comprehensive strategic planning**
- » **Planning strategies**
- » **Changing the ways services are delivered, financed and governed**
- » **Serving as a call to action**
- » **Building political momentum**
- » **Developing and enhancing partnerships**
- » **Obtaining new resources**
- » **Attracting new leaders and members**
- » **Assessing how strategies are working**

WHAT DOES THE FOUNDATION MEAN BY "USING DATA STRATEGICALLY"?

At the most basic level, using data strategically means using them to change things. For *Making Connections*, this means changing things to improve social outcomes of children in tough neighborhoods. It means using data to contribute to better solutions to real problems.

DATA SHOULD BE USED TO CHANGE THINGS, NOT JUST MONITOR TRENDS

Local data has previously been most commonly employed to assess overall conditions or monitor trends. In contrast, *Making Connections* stresses putting data to use directly to get program and policy changes made in its sites. From this vantage point, assessments and monitoring are only an instrument to contribute to the true objective: changing things for families in tough neighborhoods.

As a result, LLPs are urged to plan ahead in all data gathering efforts to link findings with selecting priorities for action.

The ability of resident organizations and other groups to effect positive social change is frequently contingent upon sound information and analysis. Our gut instinct about what should be done and why is no longer enough. Community residents, legislators, policy-makers, funders, and the media have learned to insist on solid evidence for changes that are sought. Therefore, access to reliable, timely, and understandable data is an essential tool for various stakeholders in *Making Connections* sites.

HOW CAN DATA BE USED TO CHANGE THINGS?

Data can contribute to many routes to change and many levels of change. Some are on a smaller scale; others are on a grander scale. Some have shorter-term payoffs; others are the first step in a long-term strategy. Data can be used as an initial or intermediate step to engage residents. In some instances, more than one purpose will be served by a change strategy.

For *Making Connections*, LLPs need to help channel change endeav-ors to support key goals of the site, to clarify and articulate why they believe certain actions will lead to the desired change (devel-oping a local theory of change), and to ensure that residents are involved in an integral way.

Among the ways in which data can be used strategically to effect change are the following:

To increase understanding about conditions. Data can provide details and context about a particular condition (such as the avail-ability of child care or job training) or set of conditions. Understanding often leads to action.

To identify needs. Numbers and records and stories can identify existing, emerging, or unmet needs in neighborhoods and bring the concerns of community residents to the forefront.

Uncovering Unusual Workforce Issues

The Des Moines LLP learned that in its Making Connections neighborhoods about 10% of the workforce consists of ex-offenders, young adults aging out of the foster care system, and 16-19-year-olds not in school. These people require specific types of workforce development to connect them to employment.

DATA CONTRIBUTES TO MANY WAYS OF CHANGING THINGS

Must Know To Act

" People act on what they know about, and don't act on what they don't understand. "

Member of a local planning group

What Families Require to Meet Essential Needs

The San Antonio LLP will localize a newly-developed Texas Family Security Index to San Antonio's Making Connections neighborhood. The index shows the income Texas families actually require to support their essential needs. The LLP hopes the localized data will help families better plan their economic strategy and help identify and assess the many strategies families use to survive on a limited income.

To spot trends. Conditions in our neighborhoods and public policies are changing rapidly. Keeping abreast of trends can provide "early warnings" that might indicate the emergence of new problems or the opening up of new opportunities — and increase the ability to respond to either.

To encourage dialogue. Data can spotlight common interests. They can validate what parents and residents see in their neighborhoods daily. They can dispel misperceptions and myths that divide, and provide new perspectives.

To help engage, mobilize and organize neighborhood residents. Often neighborhood residents know what programs, policies or neighborhood conditions need to change. Systematically collected information can strengthen the case for change and support arguments for action. Information can also be used to educate others and galvanize their support.

To broaden an agenda. Data can provide the impetus to take action to put issues of concern on the agenda of *Making Connections* or its neighborhood partners.

To support comprehensive strategic planning. At the largest scale, data can form the basis for working with residents to determine overall goals for their neighborhood's development — a vision of what they want it to become, and development of a series of strategies to get there.

To plan strategies. The presence of good data can guide decisions about the type and scope of strategy needed to improve a situation. Qualitative data can offer the "story behind the numbers," help explain why specific needs or issues exist, and develop a theory of change about how or why a strategy would work. Data can improve the planning process at all stages — from defining the problem or opportunity, to identifying options, to evaluating the alternatives and selecting a course of action, to monitoring implementation.

Data Can Support Issue Discussions

The Denver LLP created a story circle project to address the need to bring people together to build relationships and a stronger community. The initial round included 31 story circles with over 300 participants. Subsequent rounds may be issue-focused on topics such as literacy or child care.

Connections report to the community, Spring 2002

Fueling Housing Reform

A community organization in Providence asked the LLP to help them address absentee property ownership as part of their concern about poor housing conditions. LLP members helped the group obtain tax records for more than 40,000 parcels of land and analyze the data for such things as the correlation between absentee ownership and housing code violations. The analysis led to legislative reform and the conversion of several abandoned houses into units that residents purchased.

To change the way services are delivered, financed, and governed. Facts and figures about who is getting or not getting effective services can spark improvements in services to families and children.

As a call for action. Information can serve as an effective "wake-up call" for stakeholders affected by certain pieces of data.

To build political momentum. Reliable information can be leveraged with policymakers, the media, and community members to heighten awareness and to increase the political stakes of not making needed improvements.

To develop and enhance partnerships. With data in hand, groups may be able to seek new partners and build new collaborations by illustrating the need to work together on common concerns. In addition, information can strengthen the commitment among partners when they see their efforts are having an impact.

To obtain new resources. When information clearly "tells a story," groups can leverage resources for their cause.

To attract new leaders and members. Rigorous attention to data can attract new people to a group or movement because it demonstrates the caliber and commitment of the group.

p. 113

To assess how strategies are working. Data can provide a baseline and the means by which to track the progress and results of strategies to identify the need for course corrections and to maintain accountability for decisions.

HOW ARE *MAKING CONNECTIONS* SITES USING DATA STRATEGICALLY?

LLP coordinators indicated that their site teams were using, to a considerable degree, data developed by the LLP in forming and carrying out site strategies.

Improving Service Delivery

The Urban Strategies Council in Oakland produced a report entitled "Partnership for Change: Linking Schools, Services and the Community to Serve Oakland Youth," which showed a significant overlap in youth and families who were receiving services by several agencies. The report helped lead to the development of the Interagency Children's Policy Council, a multi-agency, multi-jurisdictional effort to coordinate the delivery of neighborhood-based wraparound services for children and families and school-linked services connected to individual schools.

STRATEGIC USE OF DATA CAN INFLUENCE POLICY AND BRING NEW PLAYERS AND RESOURCES TO THE TABLE

TABLE 16. ROLE OF LLP AS RELATED TO DATA AND THE STRATEGIES OF THE LOCAL SITE TEAM (COORDINATORS' RESPONSES)

	# of Responses
Data collected by the LLP are used to select strategies for the local site team	2
Data collected by the LLP are used to determine how best to carry out strategies of the local site team	6
The LLP collects data related to local site strategies after those strategies are selected	5
There is little use of data collected by the LLP in the strategies of the local site team	1
Other: In progress of being determined There is no current strategy for this relationship Making effort to share LLP data to inform planning Local site team just formed, little data use yet	5

In self-assessments, LLPs reported they are involved in activities that encourage the strategic use of data.

TABLE 17. STRATEGIC USE OF DATA (SELF-ASSESSMENT OF LLP)

(0=no   1=somewhat   2=yes)

Question	Average (N=10)
Is the LLP helping to build the capacity of community residents to use and understand data or to "ask" questions regarding data?	1.15
Is the LLP helping to build the capacity of stakeholders outside of the neighborhood (e.g., funders, city agencies) to use data strategically?	1
Is the LLP collecting and/or using information to help inform current policy questions and decision making that affect families in tough neighborhoods?	1
Are data (quantitative and qualitative) being presented and used that highlight *Making Connections* issues of connectedness and of positive child outcomes?	0.75

CHAPTER 6: QUANTITATIVE INFORMATION: BUILDING A DATA WAREHOUSE

QUICK OVERVIEW

A data warehouse is a comprehensive, integrated database of neighborhood-level information that propels the use of data to support community strategies to improve the well-being of children and families.

Data warehouses are integral to *Making Connections* in identifying and tracking indicators of progress, and in using data strategically to develop and achieve goals.

Data warehouses should contain and be able to integrate quantitative data from the US Census, administrative records and surveys, as well as qualitative data.

Creating a data warehouse is a major undertaking requiring careful planning, adequate resources, collaboration, resident participation, the collection and integration of quantitative and qualitative data, and easy ways to get data out in useful formats.

WHAT DOES THE FOUNDATION MEAN BY "DATA WAREHOUSE"?

The Foundation expects each Local Learning Partnership to create or expand an existing "data warehouse" as an important component of the overall *Making Connections* initiative. A data warehouse is defined as a comprehensive, integrated database of neighborhood-level information that is accessible to communities. Data warehouse functions include acquiring the data, cleaning and storing the data, and then making them available to people who need or want them. Ideally, data warehouses would be set up so that residents could directly access and use the data.

The formal definition of a data warehouse contains a number of words that are short-hand for a fuller picture of its desired characteristics.

"Data" generally means facts or figures or information to be processed; or evidence, records, statistics, etc. from which conclusions can be drawn. The term "data" encompasses two major types of data:

Quantitative data pertains to numeric information, answers the questions how much or how many; it is also referred to as statistical data or hard data. Quantitative data is designed to be statistically reliable.

A DATA WAREHOUSE BRINGS TOGETHER A GREAT DEAL OF INFORMATION FOR MANY USES

Data Helps Craft Creative Strategies

"A good data warehouse is a place where people in a community can go to get information that can help them think more creatively, data that can help them craft more relevant approaches and, in the end, build a more informed movement on behalf of families."

Tony Cipollone, Vice President, Measurement, Evaluation and Advocacy, The Annie E. Casey Foundation

THE DEFINITION OF A DATA WAREHOUSE CONTAINS CONCEPTS AND STRATEGIES ESSENTIAL TO ITS SUCCESS

Qualitative data pertains to narrative information, observations, opinions, and beliefs about a given topic. Qualitative data can give an in-depth understanding of why people hold particular views or how they make judgments, but it is not intended to be statistically reliable. However, if participants are broadly representative, findings can be strongly indicative of the population as a whole and have a strong diagnostic value.

Discussions and descriptions of data warehouses within the *Making Connections* project have mostly focused on quantitative data. However, it is desirable and important for data warehouses to also gather and disseminate qualitative data.

"Warehouse" generally means a place to store goods for distribution, or where goods are kept in reserve for a time of later need. So a data warehouse is a place that has a sizeable collection of data, only a small part of which is likely to be in use at any time. The rest is economically stored until it is needed for a particular issue or deeper analysis.

"Comprehensive" means dealing with many or all of the relevant details of a topic. A data warehouse needs to contain in one place a wide variety of information about the demographics of the neighborhood; well-being of children and families; services; economics; health; housing; transportation; education; public safety; the environment; and other topics. A comprehensive data warehouse provides a fuller picture on any given topic, and eliminates the need for people to go to multiple sources for information on an issue.

"Integrated" means bringing the parts together into a whole. Data warehouses are intended to do more than collect and spit out isolated pieces of information. They should help make sense of large amounts of information on a given topic, and be able to provide a context in which data can be understood. They should be able to synthesize data to give them power and richness.

"Neighborhood-level information" means data specific to the *Making Connections* neighborhoods, and to other neighborhoods in the *Making Connections* cities and communities. To know whether or how to take action to address an issue in a neighborhood, people cannot rely on citywide indicators which mask tremendous

---

Residents Need to Help Build Data Warehouse

"*The outcomes Tony [Cipollone] talks about are more likely when people are involved in helping to build the data warehouse. If we're really going to develop data warehouses, then let's engage residents at the outset and teach them the methodologies and process, and let them be part of the data warehouse.*"

Gus Newport,
Urban Strategies Council, Oakland

Database with Strengths and Problems

The Indianapolis Social Assets and Vulnerabilities Indicators (SAVI) is a centralized data base of mapped and tabular data about the Indianapolis Metropolitan Statistical Area, which includes nine counties. The social assets data includes all of the available agencies, programs and facilities in the community, such as health care, human services, community centers, fire and police, libraries, child care, places of worship, schools and more. The vulnerabilities data describe the demographics and social characteristics of the community. They include census data, educational data, housing data, vital statistics, crime statistics, and more.

variations in situations across neighborhoods. With current techno-
logical advances, it is now feasible to assemble data that more
accurately pinpoint the situation in a particular neighborhood.

"Accessible to communities" means making it easy for residents
and community organizations to have direct practical use of data
on issues of interest to them — rather than preparing a batch of
independent research reports. This is sometimes referred to as
"democratizing information." Democratizing information also
means that residents help create and understand data in a way that
results in them feeling they "own" the findings and conclusions.

WHY IS A DATA WAREHOUSE NEEDED?

A data warehouse serves as a tool and springboard for many of
the *Making Connections* strategies, including:

» Involving and engaging residents in strengthening families and
neighborhoods

» Using information as a bridge to local collaboration

» Using data strategically in developing and achieving goals

» Identifying and tracking indicators of progress of greatest
interest to each site

» Developing a baseline and tracking progress on a set of
indicators across all sites

» Holding systems and services accountable for their
responsibilities in strengthening families

WHAT ARE THE IMPORTANT FEATURES IN DESIGNING OR EXPANDING A DATA WAREHOUSE?

Before beginning with a list of data items to collect and catalog,
Local Learning Partnerships will benefit from developing a design
for their data warehouse. Among the important elements to
consider are:

Community change as the purpose: Plan for the use of data to
change things to improve social outcomes. For *Making Connections*,
this means improving the well-being and connections of children
and families to the supports they need to thrive.

**No Fees and Language
Options Increase Access**

*The Piton Foundation in Denver
makes its neighborhood indicators
data available on the web at no
charge to an estimated 1,900 to
2,500 unique users who visit its
web site each month. Piton has
relaunched its web site in Spanish
and English. People can create
their own maps by using the Piton
data through the Denver Making
Connections web site. Libraries
tend to be one of the larger
access points for users attempting
to view indicators on the Piton
web site.*

DATA WAREHOUSES ARE AN
INTEGRAL PART OF
STRENGTHENING FAMILIES IN
MAKING CONNECTIONS
NEIGHBORHOODS

A THOUGHTFUL DESIGN CAN
GUIDE DEVELOPMENT OF
YOUR DATA WAREHOUSE

Maximize resident participation: Determine how residents can help design the warehouse, collect information, and easily use it to seek changes.

Making Connections **framework for data collection:** Consider what kind of data is needed and available to understand and inform *Making Connections* strategies for the three strands of connections essential to strengthening families (economic opportunities, social networks, and services and supports). Although data warehouses can and should serve others beyond the *Making Connections* stakeholders, that group must be served effectively. Data in the local data warehouses should be capable of aiding cross-site data collection efforts.

Building partnerships: Creating and updating the information in a data warehouse requires engaging groups who provide various types of data based on their work (police departments, social service agencies, etc.) and others in the community already collecting data from a variety of sources. LLPs can increase the effectiveness and reduce the cost of the data warehouse by identifying up front and drawing in others who provide and want to use the data.

Trusted, objective home for the warehouse: The organization or partnership which operates the data warehouse must maintain the trust of both data providers and a wide array of users over the long term. The operator could be a non-profit agency with a broad mission to further the public interest; a community foundation; a group affiliated with a university; or a part of local government. The operator needs to be considered capable of collecting and providing data in an objective way.

Infrastructure. Hardware, software and communication platforms that provide the capabilities desired need to be identified.

Staffing. Staff skills and the number of staff needed for start-up and ongoing operation should be determined.

Data. Planners will need to establish the specific types of data needed, and which are available from whom. They will need to arrange for how the data will be obtained, stored and disseminated.

Prior Experience with Accessibility

The Boston Foundation's Community Building Network (BCBN) had initiated a Children and Families Database and an Indicators of Change project before being asked to serve as the coordinator for the Boston LLP. These earlier projects aimed to make data more accessible to residents and community-based organizations, so that BCBN was well-positioned to take on the LLP coordination role, including familiarity with data warehouse functions.

Data usage. Priority users should be identified and thought given as to how they can easily access and use the data.

Governance. Each data warehouse should have a decision-making body in place to make choices around the management and maintenance of the warehouse. Residents should be involved in the governance structure.

WHAT KINDS OF DATA SHOULD BE IN A DATA WAREHOUSE?

Within the context of the design features of a data warehouse, it may help to think about the three major sources of quantitative information as the Census, administrative records, and special surveys. Each of these sources has strengths and weaknesses, and data warehouse managers should be alert to possible bias in what topics are included or who is or is not represented in the data.

1. The **U.S. Census** remains the richest source of information available at the neighborhood scale. Because information is available at the census tract level, census data are useful for learning about indicators within a very small geographic area. Census data include many of the indicators relevant to *Making Connections*, such as basic demographic data; social and economic characteristics; and housing. The Census Bureau and other groups have developed a number of tools to allow user-friendly mapping of census data, to track key variables over time, and to integrate census data with computerized administrative records.

2. **Administrative records** are those created by a wide range of public, non-profit and private organizations to aid the administration of the work they do. Records are available from organizations addressing the economy, education, health, social services, community resources, civic participation, and many more. Records can vary from voter registration records to liquor licenses to child abuse and neglect reports to unemployment claims to business directories to police reports — and beyond. In some cases, LLPs may be able to draw on existing reports that have already collected and organized data of interest.

Many Types of Administrative Records

Public Health–Seattle & King County, the data partner in Seattle's LLP, has collected census, crime, economic hardship, job growth, educational, health and other administrative data to create a profile of the White Center neighborhood. In addition, Public Health has collected quantitative and qualitative data as part of Communities Count, a countywide social and health indicators project. This data draws on less commonly used records to report on an income inequality index, hate crimes, housing affordability, family violence crimes, and pollution in neighborhoods.

Many local public agencies have now computerized their administrative records. Through automated "address-matching," these can be put in a form that can be used with mapping software packages.

3. **Special surveys** are needed to capture data that do not exist in administrative records, yet are still vital to community change initiatives. Examples include information on the attitudes and perceptions of residents; the locations of local institutions and facilities not contained in administrative records; and information about the capacities and performance of organizations serving the community. Special surveys can also provide more strength- or asset-based data than is available in administrative records. The Foundation's cross-site resident survey to establish a baseline for *Making Connections* results is an example of using surveys to fill data gaps that remain after census and administrative data have been scoured.

There may be existing survey data about *Making Connections* neighborhoods, and LLPs may be able to obtain the databases with the raw results of those surveys.

In addition to these types of quantitative data, you should include qualitative data in your warehouse. You may have information from interviews, focus groups, study circles, community mapping, or other sources that provide a fuller perspective on community issues than can be gleaned from hard data alone.

WHAT ARE SOME WAYS TO SHARE INFORMATION FROM A DATA WAREHOUSE?

Existing data warehouses created through *Making Connections* or the National Neighborhood Indicators Project offer a variety of ways for users to access their information. These range from inviting individualized queries to which staff respond to user-friendly web sites where users can obtain pre-prepared profiles, search for specific data, or create maps displaying the data of interest. Some groups have considered adding oral histories to their web sites and developing "virtual" tours of neighborhoods to make web sites more attractive to residents.

Some data warehouses provide training and conduct outreach to let residents, community-based organizations, and others know about

---

Integrating the Sources of Quantitative Data

The Boston Children and Families Database is a collaborative project now administered by the Metropolitan Area Planning Council. It contains over 1,000 data points on a variety of concerns to neighborhood groups and residents. Data sets are obtained from the census and administrative data files. In addition, this database is connected with an annual survey related to the values and goals of the community and its definition of a healthy neighborhood, city and region.

QUALITATIVE DATA CAN ADD RICHNESS TO YOUR DATA WAREHOUSE

RESIDENTS AND COMMUNITY ORGANIZATIONS NEED EASY WAYS TO GET DATA OUT OF THE WAREHOUSE

the data they have and how they can be used to further goals of these groups. Others work with libraries and community technology centers to help overcome the digital divide that limits access to information in many of the *Making Connections* neighborhoods. Examples of useful and reasonably user-friendly data warehouses are noted in the Resources section of this Guidebook.

As more people and organizations have access to data, they are likely to combine pieces of data in new ways to uncover surprising information.

WHAT ARE SOME ISSUES THAT ARISE IN CREATING AND OPERATING A DATA WAREHOUSE?

Given the complexity of starting, operating, providing access to, and sustaining a data warehouse, it is not surprising that many LLPs are finding a number of challenges in meeting Foundation expectations for warehouse functions. Among the challenges are:

» Involving residents in planning and governing data warehouses

» Making quantitative data relevant to residents

» Making data accessible to all residents, including those of diverse cultures and those who lack access to computers or technology skills

» Broadening the range and depth of data sources

» Incorporating qualitative data

» Strengthening the alignment of data collection with site-specific and *Making Connections* outcomes

» Acquiring data from a wide range of autonomous organizations, and putting in place memoranda of understanding that will survive personal relationships

» Obtaining adequate hardware, software and communication platforms to effectively carry out data warehouse functions

» Obtaining sufficient resources for staffing (some strong data warehouses have between 1.5 and 5 FTEs)

» Keeping data up-to-date (obtaining data from administrative agencies on an annual basis seems to be the norm)

» Developing appropriate governance structures

In Chicago, Lynn Riley of Social Compact "found" a significant number of additional residents in a neighborhood with an official population of 410,000. That increase translated into significantly more buying power, which made a big difference in considering the establishment of retail businesses in the area.

RUNNING AN EFFECTIVE DATA WAREHOUSE IS COMPLICATED; KNOWING THE CHALLENGES UP FRONT CAN AID PLANNING

CHAPTER 6

Quantitative Information / Data Warehouses

» Sustainability planning (data warehouses in the National Neighborhood Indicators Project cost between $125,000 to $300,000 a year to maintain). Charging for information may assist with sustainability, but may be contrary to the goal of providing free, easy access to data.

WHAT DO DATA WAREHOUSES LOOK LIKE AT THIS POINT?

LLPs report varying levels of progress on the components of a data warehouse.

TABLE 18. BUILDING A DATA WAREHOUSE (SELF-ASSESSMENT OF LLP)

(0=no   1=somewhat   2=yes)

Question	Average (N=10)
Has the LLP acquired relevant neighborhood-level information from a variety of sources?	1.55
Can the data be geocoded to a neighborhood level?	1.25
Can the data be disaggregated by race, ethnicity, and other relevant subpopulations?	1.35
Is there capacity to conduct geo-analysis and produce mapped data?	1.55
Does the LLP have a data inventory (data dictionary) of the warehouse that includes sources, restrictions, unit level, and other information about the data?	0.8
Has the LLP established formal memoranda or letters of agreement with data providers regarding the use, updating, and ongoing sharing of the data?	1.1
Is the LLP disseminating or have a plan to disseminate documents produced?	1.2
Is the LLP analyzing and disseminating data in formats that are understandable and useful to the community?	0.9
Is there a process for responding to community requests for data?	1.25
Is there capacity or a plan to allow residents access to data held in the data warehouse independent of the LLP?	1.15
Does the data warehouse include qualitative data?	0.6
Is the data warehouse attempting to collect and include non-administrative data on economic, social, and service "connections"?	0.8
Is the LLP conducting or planning to conduct neighborhood surveys?	1.2

CHAPTER 7: QUALITATIVE DATA

Qualitative data (narrative information, observations, opinions, beliefs) brings out the voices and viewpoints of people to explain what statistics alone cannot.

Common forms of qualitative data collection include observation, interviews, focus groups, audiovisual methods and ethnographic research.

Effective use of qualitative data involves having a clear purpose in mind, working respectfully with people, and managing vast amounts of narrative data.

WHAT DOES THE FOUNDATION MEAN BY "QUALITATIVE DATA"?

As noted earlier, the general definition is:

Qualitative data pertains to narrative information, observations, opinions, and beliefs about a given topic. Qualitative data can give an in-depth understanding of why people hold particular views or how they make judgments, but they are not intended to be statistically reliable. However, if participants are broadly representative, findings can be strongly indicative of the population as a whole and have a strong diagnostic value.

QUALITATIVE DATA REFERS TO NARRATIVE INFORMATION, OBSERVATIONS, OPINIONS, AND BELIEFS ABOUT A GIVEN TOPIC

Historically, qualitative data has been viewed in most circles as inferior to quantitative data. They were considered less reliable, less objective, less valid, and too soft. However, in recent years, qualitative data have become more respected and valued.

Newer types of qualitative research attempt not just to understand but also to inform participants' views by actively supplying them with information which allows them to reach a more considered view.

WHY IS QUALITATIVE DATA NEEDED FOR *MAKING CONNECTIONS*?

Qualitative data are important to *Making Connections* because they provide viewpoints, explanations, nuances, and understanding that cannot be gained through statistics alone. Qualitative data draw out the voices and opinions of residents and stakeholders.

p. 98

Qualitative data can capture and explain the context in which *Making Connections* occurs.

In fact, many people, when asked "what are qualitative data?" tend to respond by describing what they do. They say that qualitative data:

» Provide alternative definitions to our usual language (people mean different things by the words "neighborhood," "resident," and "family").

» Expand our understanding and ability to discern the meaning of quantitative data.

» Provide details and insights into relationships, attitudes and behaviors that cannot be measured by quantitative data alone.

» Help put the human face on community change, enriching the analysis with first-hand accounts by residents and other stakeholders.

» Are concerned with the personal meanings people bring to the circumstances and events of their lives.

» Are a tool for getting information that is difficult to reach in other kinds of ways.

» Help understand how policies and programs push people in certain directions, whereas statistics tend to imply that deficits are the problem of individuals.

p. 113

» Capture contextual data at the neighborhood, state and regional levels to explain the full range of factors that shape experiences in local communities. (The Foundation expects LLPs to use its qualitative data collection skills to provide contextual data as part of the evaluation plan for *Making Connections*.)

WHAT ARE COMMON FORMS OF QUALITATIVE DATA COLLECTION?

Qualitative data collection includes a variety of techniques. Within each technique, there can be many types of purposes and procedures. Often, more than one type of qualitative data collection is used to confirm or cross-check the accuracy of data from different sources.

QUALITATIVE DATA BRINGS OUT THE VOICES AND VIEWPOINTS OF INDIVIDUALS TO EXPLAIN WHAT STATISTICS ALONE CANNOT

Numbers Alone May Be Misleading

"*In San Antonio, looking at the numbers shows very little formal child care in our neighborhood. But if you talk to residents, you find that most of them use family, friends or neighbors for child care and there is little need for more mainstream child care centers.*"

Louis Mendoza, Former San Antonio LLP Coordinator

Keeping a Log of Families' Experiences with Public Services

Through the Family's Eyes, a project of the Des Moines LLP, describes how families in Polk County's poorest neighborhoods experience public services and what barriers families face in accessing services and in daily survival. Families are asked to keep a log of any experiences they have in meeting their families' needs. They meet regularly with a family recorder to go over the log and provide additional information. Participating agencies will use the results of the study to identify internal strengths and weaknesses in their ability to meet the needs of the community.

» **Observation:** Recording situations as they happen, through written or taped notes, video, photographs, or checklists.

» **Interviews:** Asking a series of open-ended questions of one person at a time to obtain in-depth information on selected topics, personal histories, cultural knowledge, etc.

» **Focus groups:** An interviewer-led group discussion with a group of people familiar with the topic or belonging to the group under study. Focus groups can yield information about norms, behaviors, beliefs, and attitudes.

» **Audiovisual methods:** Using audiotapes, videotapes, or photographs to record events, interviews or locations.

» **Ethnographic research:** A scientific, investigative approach to learning about the culture (beliefs, behaviors, norm, attitudes, etc.) of groups of people. Researchers normally spend a lot of time living, working, observing and interacting with a community in order to study it from "the inside" but with an outsider's perspective. Ethnography is inductive and builds from finding out what people actually do and the meaning they attach to it, before assigning our own interpretations to their behavior.

Ethnography Showed Effects of Job Mobility on Children

A team of researchers engaged by the Annie E. Casey Foundation's Jobs Initiative spent several days a month with parents who were receiving training or employment through the Jobs Initiative and their children experiencing first-hand the struggles and resilience in parents' day-to-day work and family lives. They accompanied parents on work shifts and talked with co-workers and supervisors. They spent days in the children's child care centers and schools, in churches, and in therapeutic and service settings.

The depth and extent of information about parents' work and children's welfare from this ethnography can contribute to decisions about how to allocate workforce development and welfare dollars so that low-income earners keep jobs and advance to family-supporting incomes — in ways that improve rather than hinder children's immediate and longer-term well-being. Specifically, the work offered new insights into how workforce development contributes to the job mobility of low-income workers, and how that mobility or its absence affects the workers' children.

Multiple Interviews Reveal How Residents Define Their Reality

Two ethnographers from the Hispanic Research Center at the University of Texas conducted unstructured interviews and focus group discussions with residents of West Side San Antonio to better understand the social aspects of poverty behaviors and culture. All individuals were interviewed three or more times to allow the more detailed information that emerges after the interviewer has established a relationship with the respondent.

Interviewers selected ethnotheory as their approach. Ethnotheory is based on the assumption that individuals use their common sense knowledge to interpret and cope with situations and that multiple definitions of reality exist simultaneously. A comprehensive life history must encourage the discovery of how an individual makes sense of what he/she is doing and how they define reality.

Talking Numbers: West Side Voices

WHAT ARE SOME ISSUES THAT ARISE IN WORKING WITH QUALITATIVE DATA?

Qualitative data gathering should occur within a comprehensive framework of data collection, in which it is clear what the purpose of the data gathering is, who the target group is, how the information will be used, and how it fills out an overall picture of a community or issue.

For *Making Connections*, qualitative data collection must be linked to outcomes. For example, qualitative data might be used to shape the content of surveys that will collect quantitative data. Or qualitative data may be collected to explain unexpected results on a key outcome.

Qualitative data collection involves a great deal of interaction with people from whom information is sought. Unlike people developing tables and graphs of quantitative data pulled from administrative records, those seeking qualitative data are communicating directly with individuals or groups. The nature of these contacts immediately brings into play dynamics related to researcher vs. the researched, and of race, ethnicity, culture, class and gender. These dynamics can affect a variety of relationships with those directly or indirectly involved, as well as with the quality of the data collected.

Another challenge of qualitative research lies in organizing, sorting, and comparing the vast amounts of highly individualized data that interviews and observations produce. Several brands of software allow researchers to create searchable databases of text, audio, and video material. Coding mechanisms can enable researchers to organize the data by themes and attributes and compare the data across sources. The software does not replace human reflection and analysis, but it can help get to the heart of massive amounts of qualitative data and lessen the burden of administrative work.

HOW WILL QUALITATIVE DATA SUPPORT EVALUATION EFFORTS?

Qualitative data will be needed to provide contextual information for the *Making Connections* evaluation. To collect that data, LLPs

EFFECTIVE USE OF QUALITATIVE DATA INVOLVES HAVING A CLEAR PURPOSE IN MIND, WORKING RESPECT-FULLY WITH PEOPLE, AND MANAGING VAST AMOUNTS OF NARRATIVE DATA

will need to work with others involved in evaluation activities to define and prioritize goals for understanding the external factors that can affect the direction and success of *Making Connections*. Factors for contextual data can include: experience in prior long-term initiatives; the nature of core outcomes for a site; the existence of key questions where context is crucial to understanding why strategies are or are not successful; and the characteristics of primary audiences for contextual information.

In addition, qualitative data will be needed to explain and illumine results on core outcomes of both the national and local evaluations. LLPs will work with other evaluation participants to select a limited number of outcomes around which qualitative data is most needed. From there, the group will need to determine what aspects of each priority outcome will be most meaningful to the overall evaluation plan.

QUALITATIVE DATA WILL BE USED TO PROVIDE CONTEXTUAL INFORMATION AND TO EXPLAIN RESULTS ON CORE OUTCOMES

CHAPTER 7   Qualitative Data

HOW ARE LLPS USING QUALITATIVE DATA?

LLPs report a modest involvement in qualitative data at this stage of their development.

TABLE 19. USING QUALITATIVE DATA (SELF-ASSESSMENT OF LLP)

(0=no   1=somewhat   2=yes)

Question	Average (N=10)
Is the LLP collecting qualitative information on the *Making Connections* communities and issues, particularly issues of economic, social, and service connections?	1
Has the LLP developed a framework for qualitative data collection?	1
Are residents and other stakeholders involved in the development of this agenda or framework?	1
Is the agenda or framework designed to help advance the development of a neighborhood-based family strengthening movement?	1.3
Are residents being involved in the collection, analysis, and use of qualitative data?	0.9

p. 113

Qualitative Data

CHAPTER 8: DOCUMENTING PROCESS AND CHANGE

QUICK OVERVIEW

Process documentation means to write down or record in some way a process that is going on. It tells the story of how and why something happened, rather than just describing what happened.

The goals of process documentation for *Making Connections* are to: assist in decision making, local self-evaluation, and improvement efforts within *Making Connections*; describe the local *Making Connections* theory, strategies, and implementation and provide an ongoing description of contextual and environmental factors that affect local implementation and; give the Foundation and local teams frequent opportunities to analyze and collectively learn from implementation experiences.

The Foundation expects process documenters to apply the *Making Connections* framework to their observations and analyses, rather than being purely objective.

Process documentation is part of the evaluative process for *Making Connections*. In particular, process documentation provides sites with self-evaluation information.

Many *Making Connections* participants need to be involved in defining the parameters of the process documentation.

Local process documentation tries to capture many different types of information, so it relies on a combination of methods that are repeated periodically to capture changes over time.

Products should be prepared at useful intervals in user-friendly formats.

WHAT DOES THE FOUNDATION MEAN BY "PROCESS DOCUMENTATION"?

Documentation is the act of:

1. Capturing core information about strategies, decisions, practices, processes, issues, and contextual factors;

2. Organizing and analyzing the information in ways that build knowledge; and

3. Creating relevant, accessible products that disseminate the knowledge to a variety of audiences.

Process documentation means to write down or record in some way a process that is going on. It tells the story of *how* and *why* something happened, rather than just describing what happened. For *Making Connections*, local process documentation involves having people observing activities within *Making Connections* sites, interviewing stakeholders about their decisions and perceptions, analyzing the themes, lessons and issues that emerge, and creating products that communicate findings in clear, action-oriented ways.

The Foundation expects process documenters to apply the *Making Connections* framework to their observations and analyses, rather than being purely objective. In other words, the documentation needs to be tied into the *Making Connections* themes and strategies. It must be viewed through the lens of the local theory of change (why the site believes that following its strategies will lead to stronger families and neighborhoods). The documentation must be fair and accurate. The results should be packaged in useful ways.

The goals of process documentation for *Making Connections* are:

» Assist in decision making, local self-evaluation, and improvement efforts within *Making Connections*

» Describe the local *Making Connections* theory, strategies, and implementation and provide an ongoing description of contextual and environmental factors that affect local implementation

» Give the Foundation and local teams frequent opportunities to analyze and collectively learn from implementation experiences

The Foundation wants process documentation to describe and analyze the issues that local partners are most concerned about, the strategies and actions used to respond to those concerns, and the compelling stories that illustrate the issues and responses. In addition, the Foundation prefers that documenters focus on long-term strategies; try to capture the big picture; and explain how it changes over time. Process documentation should trace the routes of change in ways that can inform local choices and assist with self-assessment needs.

PROCESS DOCUMENTATION IS INTENDED TO CAPTURE AND ANALYZE THE STORY OF HOW *MAKING CONNECTIONS* UNFOLDS IN EACH SITE

Planning Structure for Process Documentation

The Gaston Institute at UMass-Boston has developed detailed tables for each area of Making Connections in which it is doing process documentation, in discussion with the affected parties. Areas include the Neighborhood Based Team (now called the Urban Village Working Group, which is the overall Making Connections site team), the LLP, and specific projects. Each table lists the topics for documentation, the specific issues to be tracked, the data needed, and the methodology to obtain the data.

Process documentation is part of the evaluative process for *Making Connections*. In particular, process documentation provides sites with self-evaluation information. Its usefulness for this purpose will depend upon the documenter's ability to tell the truth in helpful ways, and the willingness of other local team members to hear it in the spirit of mutual learning. The Foundation wants to encourage this type of culture and intends to demonstrate that sites will not be penalized by honest efforts toward relevant goals which may not yield the intended results. The Foundation does not consider process documentation an evaluation of the site's progress.

p. 95

Process documentation uses qualitative research techniques (such as interviews and focus groups), because those methods are more useful for capturing things that can't be described in numbers – such as what people think and why they make certain choices. Process documentation uses a site's theory of change as a framework and provides a way to analyze the twists and turns on that pathway.

WHY IS PROCESS DOCUMENTATION NEEDED?

The Foundation values process documentation because it fosters reflection, analysis, and real-time learning. It also collects in-depth data on contextual factors that are hard to measure in other ways. In addition, it gives the Foundation a tool for sharing lessons about the challenges, opportunities, and complexities of family-strengthening efforts with internal and external audiences, and captures the compelling anecdotes that personalize the work of *Making Connections*.

Process documentation is used to help understand and explain complex or long-term projects or activities. It looks at what happened to bring about a change. It tells how different people look at what is happening. It provides information about *why* some things worked or didn't work or were modified along the way.

For *Making Connections* in the short term, site-based process documentation is intended as a tool for decision making, self-evaluation, and improvement efforts.

PROCESS DOCUMENTATION IS PART OF THE *MAKING CONNECTIONS* EVALUATIVE PROCESS

PROCESS DOCUMENTATION IS A TOOL FOR DECISION MAKING, SELF-EVALUATION, AND IMPROVEMENT EFFORTS

System Tracks Who's Participating

"*Denver uses an automated system to track who attended all meetings and events, and whether people are coming back more than once. We do some analysis of how many got involved. We could do much more with the data we've collected which at present includes about 3,000 Making Connections – Denver participants, 1,300 home visits, and 500 meetings.*"

Terri Bailey, Denver LLP Coordinator

Process documentation will help all of us understand the complexity of family-strengthening work. In the long term, process documentation can help us understand outcomes, hold ourselves accountable for results, and describe progress in ways that attract other investors and resources.

Process documentation mines the wealth of knowledge that resides within local partners and communicates it in ways that help people avoid pitfalls, build on lessons learned, and reach new levels of success.

Process documentation is both a means to an end and the end itself. The activity of capturing and recording the change process stimulates reflection and self-analysis among *Making Connections* participants – an important part of a continuous learning process for sites in which LLPs can play a lead role. And the final products give sites and the Foundation a tool for understanding developments within and across sites.

WHAT KIND OF FRAMEWORK SHOULD GUIDE THE WORK OF DOCUMENTERS?

The Foundation is not prescribing a specific approach to process documentation, but has provided LLPs with guidance and a framework that outlines Foundation expectations.

The process documenter needs an overview and background of the site's work and clarity from the local site coordinator, the Foundation's site team leader, and LLP representatives about:

>> Who will identify the people to be interviewed?

>> How should the documenter explain the work to those being interviewed?

>> How can interview opportunities occur conveniently?

>> What opportunities exist for observing meetings, workshops, neighborhood events, etc.?

>> Who will provide the documenter with documents to review?

>> What feedback will be provided to whom and how often?

>> What are the formal products to be submitted and when?

What Do We Hope to Understand through Process Documentation?

Who makes change happen and how does it happen in Making Connections efforts to:

>> *Shape, explain, and spread the message of neighborhood-based family strengthening*

>> *Involve partners within and outside the neighborhood, including residents*

>> *Cultivate alliances and build a critical mass of support*

>> *Leverage resources*

>> *Align with other vehicles for change*

>> *Adjust policies or practices*

>> *Conduct strategic planning*

>> *Identify information needs*

>> *Build capacity to collect and use data*

>> *Reach short-, interim-, and long-term outcomes*

>> *Lay the basis for long-term, sustainable improvements*

A PROCESS DOCUMENTER NEEDS CONTEXT AND CLARITY ON ROLES TO BE EFFECTIVE

WHAT ARE THE STEPS IN DEVELOPING LOCAL PROCESS DOCUMENTATION?

According to the Foundation evaluation staff, they include:

1. Establishing a starting point and guidelines for collecting data

2. Building the framework for documentation around the local theory of change

3. Establishing procedures for feedback from the documenter to the site team and Foundation

4. Establishing a process for feeding data requests from the Foundation to process documenters

5. Designating a point person to coordinate communication between local documenters and other consultants working on site

6. Establishing a process for revising local documentation work to accommodate changes in priorities and interests

WHAT ARE THE ATTRIBUTES OF A GOOD DOCUMENTER?

Key attributes for someone doing process documentation are the ability to work with local stakeholders, including residents; a long-term and big-picture perspective; the ability to apply the local theory of change to analyses while maintaining fairness and accuracy; and creativity in presenting data in useful ways.

The role of the process documenter is to translate the ideas and lessons of *Making Connections* into knowledge. People doing process documentation are not merely notetakers or recorders – they are writers seeking to capture what we are all learning.

WHAT KINDS OF DATA SHOULD PROCESS DOCUMENTERS COLLECT?

The content of local documentation should be determined collectively by the site team leader, local liaison, LLP members, and other local partners, based on the local theory and pathway of change.

Need to Identify Learnings

"Our process documenters were in an "objective" role. We realize now it would have been more helpful to hear what they actually thought. It would have been better to have a series of ongoing reflective conversations, rather than just straight documentation."

LLP Coordinator

Need to Define Audiences, Their Needs

"Those doing process documentation need to know who their audience is. This affects what you observe and how you present observations. It's really important to think 'why' and 'for whom' with process documentation."

LLP Coordinator

Documentation should focus on those dimensions of the change process that are most likely to influence the initiative's success, such as: partners' perceptions, roles and relationships, decisions, strategies, priorities, activities and events, investments, factors that shape the context in which *Making Connections* is operating, and accomplishments. For example, most sites will probably want to know something about the following topics:

1. **Theory of change.** What do local stakeholders think is the Foundation's theory of change? What are the local theories about what has to happen to create strong families and supportive neighborhoods?

2. **Stakeholder engagement.** Which stakeholders are most involved? What are they doing to move the work forward?

3. **Local leadership:** Who is emerging as local leaders? How are leaders brought into *Making Connections*? What do local leaders do?

4. **Local collection and use of data:** What are the roles and relationships of LLP members in supporting *Making Connections*? What impact, influence, and leverage can be attributed to the LLP?

5. **Three "connection" strands:** For each strand, what strategies and actions are being used to connect families? How does work on each strand relate to the other two?

6. **Capacity to carry forward a family strengthening agenda:** What capacities has *Making Connections* drawn on locally? What capacities has it helped to develop? What strategies are successful in building local capacity?

7. **Management of change process:** What roles or structures are used to manage the work? How do management arrangements help or hinder the work?

8. **Scale and sustainability:** How is the *Making Connections* agenda championed locally? What elements have the greatest potential to go to scale? To be sustained over time?

MANY *MAKING CONNECTIONS* PARTICIPANTS NEED TO BE INVOLVED IN DEFINING THE PARAMETERS OF THE PROCESS DOCUMENTATION

9. **Context:** What demographic, economic, or political factors affect the implementation of *Making Connections*? What factors help explain outcomes?

10. **Cross-cutting analytical questions:** What critical decisions and trade-offs have been made? What capacities need to be developed to move forward? What implications or lessons in the above categories influence *Making Connections*' scale, sustainability, and ability to produce results?

Documentation should be thorough without gathering so much detail that it is hard to see the key themes or "ah-ha's." Exhaustive descriptive information without synthesis or analysis is likely to frustrate both those creating it and those trying to use it. Both those providing the information and those using it need to distinguish what is most relevant to the process documentation.

THOROUGHNESS AND FOCUS ARE MORE IMPORTANT THAN VOLUMES OF DETAILS

HOW DOES THE DOCUMENTATION PROCESS WORK?

Local process documentation tries to capture many different types of information, so it relies on a combination of methods that are repeated periodically to capture changes over time. Methods include interviews with individuals, focus groups, document reviews, observation at selected events, and photographs.

CORE STAKEHOLDERS ARE THE MOST IMPORTANT PEOPLE TO INTERVIEW

Interviews
A core group of stakeholders (the people most intimately involved with or affected by *Making Connections*) should be individually interviewed about the following topics: (1) roles and responsibilities; (2) activities planned or under way; (3) perceptions about *Making Connections*' focus and effectiveness; (4) emerging issues and concerns; (5) changes in strategy or involvement; (6) rationale for key decisions; and (7) progress toward goals.

Core stakeholders might include neighborhood leaders; residents; representatives of community organizations, agencies, foundations, and local government; service providers; business partners; administrators from county and state agencies; legislators; and members of institutions that serve as hubs or anchors for family strengthening in the *Making Connections* neighborhoods.

Range of Interview Subjects

The University of Indianapolis conducted the first round of process documentation for the Indianapolis LLP. Methods included interviews with residents from the Martindale Brightwood and Southeast neighborhoods, and with organizers and participants involved in specific strategies. In the future, neighborhood residents, in conjunction with their local institutional partners (Martin University and University of Indianapolis), will conduct their own process documentation.

Focus Groups

Documenters can convene focus groups to capture important points of view that might not be included in individual interviews—for example, with neighborhood residents and representatives of community organizations that are affected by, but only marginally involved in, *Making Connections*.

The focus groups should elicit information on how these stakeholders perceive the changes being implemented through *Making Connections*. In essence, they provide a reality check on how well the initiative is working for those who live and raise families or serve families in *Making Connections* neighborhoods.

Document Reviews

Documenters should review the paper trail left by collaborators, including:

- » Informal reports by site team members that track progress on short-term tasks
- » Schedules and records of local activities related to *Making Connections*
- » Records of stakeholder meetings
- » LLP memos and papers that outline progress, problems, and lessons learned
- » Records of individuals and organizations participating in *Making Connections*
- » Products disseminated to stakeholder groups by collaborators

The documenters should glean from these records information about: (1) the content, breadth, and depth of the process of place-based family strengthening; (2) changes in key players, goals, focus, and strategies; (3) early hints of trouble, success, or surprises; (4) background on how problems are resolved; (5) issues to pursue in interviews and focus groups; and (6) progress toward goals.

Observation

Periodically, events will occur that either shape or exemplify the process of change, and documenters should attend these events as non-participating observers. Events that warrant observation might include:

» Neighborhood festivals, exhibits, or demonstrations

» Family study circles

» Stakeholder meetings that are open to the public

» City/county council meetings at which *Making Connections* interests are on the agenda

» Media events to announce changes relevant to *Making Connections*

In addition, there may be features of a community for which "before and after" photographs would document incremental changes. Observations could be captured visually in these cases, rather than through narrative descriptions.

HOW SHOULD PROCESS DOCUMENTERS PACKAGE THEIR FINDINGS?

Local documentation products should provide information frequently enough to support in-course corrections. Reports should be easy to use and relevant to sites' interests. Products might include:

» Brief, informal memos explaining major issues uncovered through documentation activities.

» Periodic summaries of themes or patterns in strategies, actions, and perceptions among core stakeholder groups and across all major collaborators.

» Periodic in-depth examinations of issues that identify potential courses of action.

» A comprehensive annual summary of participants, activities, strategies, accomplishments, obstacles, progress toward outcome goals, etc.

PRODUCTS SHOULD BE PREPARED AT USEFUL INTERVALS AND IN USER-FRIENDLY FORMATS

Reporting in Ways that Work

"*We've shifted from big reports to sharing observations verbally in weekly Making Connections staff meetings. We briefly tell people what we see going on, and what we think it means.*"

Anne Gienapp, Seattle LLP Coordinator

WHAT ARE SOME ISSUES THAT ARISE IN PROCESS DOCUMENTATION?

As your LLP decides how it will carry out its process documentation duties, you need to consider some of the issues that may arise related to these activities. The site team leader, local site liaison, LLP team members, and the people doing the documenting should establish guidelines for addressing the questions below before starting or continuing process documentation activities. Although there are no easy answers, or ones that are right for all sites, LLPs have reported that acknowledging and finding effective choices up front will save a lot of time and trouble later.

One of the most difficult issues is the tendency of documenters or others to squelch information that may create conflicts or displease their sites. It is for situations like this that answers to the following questions need to be agreed upon in advance.

Working with residents on process documentation

» What roles can residents play in process documentation?

» How does involving residents in process documentation help build their capacity for leading community change?

» How can process documentation be useful to residents in other ways?

Accountability

» What does accountability include (taking direction from, whose interests you have in mind in framing a report, etc.)?

» To whom is the process documenter accountable (neighborhood residents, Foundation evaluation liaison, Foundation site team leader, Foundation management team, others)?

» How will the documenter incorporate feedback and handle differences in perspective in preparing reports?

» How is the accountability of the process documenter affected by who is paying him/her?

» How do process documenters handle multiple accountabilities and multiple audiences?

WORKING TOGETHER TO ADDRESS ISSUES UP FRONT REDUCES TENSION AND ADDS CLARITY OF ROLES

Confidentiality Results in More Candid Input

" *Our process documenters guarantee interview subjects complete confidentiality. This has provided the shelter that people need to allow them to be completely candid, thoughtful and analytical during interviews. As a result, we have been able to gather valuable information about underlying issues and dynamics that affect our Making Connections work both positively and negatively.* "

Miren Uriarte, Process Documenter, Boston LLP

Confidentiality on input and on findings

» To what extent can or should process documenters provide confidentiality to those who provide input (in order to gain their candor)?

» What happens when documenters are pressed to loosen that confidentiality arrangement?

» Should all of the documenter's findings/observations be part of a public report, or is it appropriate for some comments to be conveyed privately?

WHAT PROCESS DOCUMENTATION HAVE LLPS DONE TO DATE?

LLPs report considerable involvement in process documentation.

TABLE 20. PROCESS DOCUMENTATION (SELF-ASSESSMENT OF LLP)

(0=no   1=somewhat   2=yes)

Question	Average (N=10)
Is the LLP preserving the record of *Making Connections*?	1.4
Is process documentation being used locally to inform *Making Connections* work on the ground?	1.2

CHAPTER 9: EVALUATION

Local Learning Partnerships (LLPs) will have many challenging roles in the *Making Connections* local and national evaluation. Each level of evaluation involves a complex set of relationships.

LLPs must manage their evaluation roles within many types of relationships, and may be called upon to negotiate issues of anxiety and mistrust.

The goals for LLP evaluation work are:

» **Help clarify the purpose of *Making Connections* work with compelling data, research and observation**

» **Build the technical capacity of a variety of partners**

» **Build relationships between and among local organizations**

Evaluation means a systematic effort to describe, analyze, and provide objective information about how well a program or initiative is working.

Because *Making Connections* is part of a larger initiative to change perceptions, attitudes, and practice and to influence policymakers across sectors, the Foundation must marshal data, provide evidence, and lay out a clear story to show the extent to which its theories are making a difference in lives and life chances of families and children in tough neighborhoods.

Evaluation will also aid the management of *Making Connections* as it can help keep the work on track, help make the right mid-course corrections, and help assess whether challenges to moving ahead have to do with pace, power, energy or other causes. It also offers learning opportunities, through working across groups to understand the factors, conditions, trends and indicators needed to develop solutions and effect change.

Given the complexity of *Making Connections*, the Foundation can only achieve its learning goals through an evaluation that operates in multiple sites, at multiple levels, using multiple methods. Thus the evaluation plan for *Making Connections* encompasses both cross-site evaluation and local self-evaluation.

Results Critical to Credibility

" If we do not lift up results, so that all who watch see progress, we will not have the credibility to keep pushing this agenda. "

Audrey Jordan, Evaluation Liaison, Annie E. Casey Foundation

Evaluation

CHAPTER 9

113

For the *Making Connections* sites which participate in Phase 2 of this initiative, Local Learning Partnerships will be part of carrying out the comprehensive evaluation framework, which includes the following cross-site components:

1. Neighborhood and citywide surveys of families in the sites

2. Development of a database of indicators for place-based family strengthening (using the LLPs' data warehouses)

3. Analysis of Census and administrative records across sites (with involvement of the LLP data warehouses)

4. Documentation of the implementation process

Each site will also develop a local self-evaluation to capture the site-specific nature of *Making Connections*.

The sites' involvement in the formal evaluation process began in early 2002, and is likely to evolve over time. The efforts to measure progress will test relationships carefully built, trust and candor.

The Foundation states that data gathering and surveys will not be used to compare progress among the sites, but rather to promote and share learning among them.

Although *Making Connections* was three years old before a detailed evaluation design began, the Foundation needed to have local partners in place to help think about a relevant and appropriate evaluation strategy. In addition, since being locally defined and resident driven is a crucial premise of *Making Connections*, the Foundation was not in a position to take on evaluation design until sites had built relationships with residents who can be involved in the evaluation development and design.

The Foundation wishes to authentically engage residents in its evaluation efforts. Having residents central to the evaluation design and to data collection, analysis, and interpretation will be a new, unique and powerful approach to evaluation.

THERE IS GROWING EMPHASIS ON EVALUATION AS PHASE 2 OF *MAKING CONNECTIONS* UNFOLDS

Beneficiaries are the Children

"*What we have to remember, all of us, is that we are not doing this to feel good but because of the millions of children whose futures are clouded and compromised.*"

Ralph Smith, Senior Vice President, Annie E. Casey Foundation

STARTING EVALUATION EFFORTS EARLIER WOULD HAVE FORECLOSED MEANINGFUL RESIDENT ENGAGEMENT IN EVALUATION DESIGN AND INTERPRETATION OF RESULTS

WHAT IS THE ROLE OF LOCAL LEARNING PARTNERSHIPS IN EVALUATION

Local Learning Partnerships will have many roles in both local site evaluation activities and those related to the Foundation's cross site evaluation plan. An overall responsibility will be to ensure that Phase 2 strategies, data gathering and evaluation efforts reflect both *Making Connections*' core outcomes and those that communities have defined.

The Foundation aims to "do evaluation differently" for *Making Connections*. This includes incorporating many of the principles which shape the initiative as a whole: involving residents in framing and measuring results; democratizing evaluation data; using tools that are respectful and appropriate to the race, ethnicity, class and gender of respondents; willingness to engage in self-evaluation; and using evaluation to promote and share learning rather than to compare sites.

Local self-evaluation. LLPs will have a central role in local self-evaluation activities, which include:

» Helping their sites develop a local theory of change based on data-driven strategies, needs and outcomes

» Using the core outcomes as a resource to define and measure the site's own set of strategies

» Documenting the process of *Making Connections*

LLPs will synthesize information from a number of their activities to track and report results of local strategies and outcomes, as reflected in the graphic below:

LLP ROLES IN THE LOCAL AND CROSS-SITE EVALUATIONS WILL DIFFER CONSIDERABLY

Evaluation

CHAPTER 9

"House Meetings" about Outcomes

Louisville is working with residents to determine what outcomes they want for their neighborhoods through a series of "house meetings," for which 8-10 captains will convene people from the neighborhood to talk about what changes they would like to see.

Cross-site evaluation. LLPs will work with the Foundation on its cross-site evaluation. At the current time, the following elements of LLP involvement have been defined:

1. Developing a baseline and periodically measuring indicators of a set of 36 core outcomes selected by the Foundation

> » *Cross-site survey:* LLPs will assist in the local implementation of a survey in each site in late 2002 of 800 people through in person interviews and of 800 city/area residents by telephone, through recruiting of interviewers and setting up survey operations. LLPs will also work with their site teams to add local questions of interest to the survey.

> » *Administrative data sources:* LLPs will draw on their data warehouse and other local knowledge to provide the Foundation with data on key indicators for the core outcomes.

2. Using a framework for process documentation developed by the Foundation with input from LLPs and sites

3. Advising on the cross-site evaluation plan

4. Helping to analyze cross-site data

The Foundation plans to also include qualitative data, collected by means of in-depth, open-ended interviews, and observational research in its cross-site evaluation.

Nature of LLP role. As LLPs become involved in local and cross-site evaluation, they will encounter additional complexities and nuances in their role and relationships. Although the Foundation does not view LLPs as evaluators, they may be perceived as such in their communities due to their involvement in evaluation activities. They may thus run into some of the anxieties and mistrust associated with evaluation.

LLPS MUST MANAGE THEIR EVALUATION ROLES WITHIN MANY TYPES OF RELATIONSHIPS

Local Learning Partnerships will be managing two parallel sets of relationships around evaluation, as depicted below:

LLP	⇄	**Foundation Evaluation Liaison**	⇄	**Foundation Staff**
Site Evaluation	⇄	**LLP**	⇄	**National Evaluation**
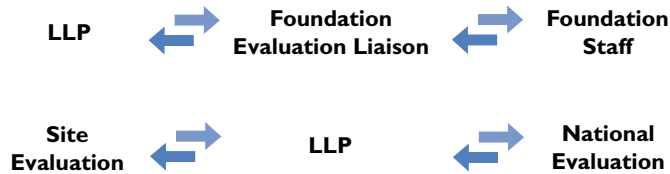
The Foundation has the following goals for LLPs related to Phase 2 and the *Making Connections* evaluation:

» Help clarify the purpose of the *Making Connections* work with compelling data, research and observation

» Build the technical capacity of a variety of partners

» Build relationships between and among local organizations

The Foundation describes LLP responsibilities related to Phase 2 and the *Making Connections* evaluation as:

» Taking a leadership role in applying data to the advancement of a family strengthening agenda, which entails the identification and monitoring of results

» Providing timely and relevant analysis of and data-driven responses to local, city and state policy that impact children and families

» Supporting accountability and a focus on results

» Ensuring that local process and outcome evaluation are completed and communicated promptly to site and Foundation staff

» Supporting good qualitative research, such as ethnography, videos, oral history, and neighborhood and family circles that capture the aspirations and challenges of children and families in tough neighborhoods

» Maintaining an on-going relationship with the local site team and the Foundation evaluation staff

» Exchanging information and participating in learning opportunities across the *Making Connections* network

THE FOUNDATION HAS SPECIFIC EXPECTATIONS OF LLPS AROUND EVALUATION

Evaluation

CHAPTER 9

» Contributing to the collective learning from *Making Connections* in the areas of family strengthening strategies, evaluation, community-building, resident leadership, etc.

» Providing residents and community-based organizations with actionable and compelling information, data warehouses, survey support and research strategies

Executing these roles will require LLPs to help establish and maintain clarity about *Making Connections'* values, premises and aspirations and to develop increased technical competence in a variety of evaluation and data gathering methods. More than ever, this requires developing strong, genuine partnerships with and among residents, local partners, and site teams.

Extent of LLP role in evaluation. LLPs in each of the Phase 2 sites were consulted about the initial cross-site survey development and implementation process. Beyond that, the level of LLP involvement will be defined and negotiated on a site-by-site basis in the context of local priorities, capacities, interests, and needs. The Foundation's evaluation liaisons will work with the site team leader, the LLP, and the cross-site evaluation team to define that role.

WHAT ARE SOME ISSUES THAT MAY ARISE ABOUT EVALUATION

LLPs will need heightened awareness and skills to help ensure that evaluation activities do not damage local relationships, nor impede, hinder or be seen in conflict with local data collection and research efforts. LLPs will also be called upon to devote significant time to local and cross-site evaluation efforts while continuing their existing duties. This may stretch resources, create tensions among team members, and require different and deeper resident engagement efforts.

HOW HAVE LLPS BEEN INVOLVED IN EVALUATION READINESS TO DATE?

LLPs recently began their intensive involvement in evaluation activities. Therefore, the information gathered for this Guidebook does not reflect the extent of more recent evaluation activity. Ratings on the few items about evaluation on the self-assessment form are noted in Table 21.

STRONG RELATIONSHIPS AND PARTNERSHIPS ARE IMPORTANT TO MANAGING THE DYNAMICS AROUND EVALUATION

Gain from the Pain

"Being pushed by Casey on outcomes and the cross-site survey have advanced our thinking amazingly, even if they have been difficult and side-tracked us. This got people to articulate what they are doing. Indicators and outcomes are common language now. It has been transformative."

Terri Bailey, Denver LLP Coordinator

TABLE 21. EVALUATION READINESS (SELF-ASSESSMENT OF LLP)

(0=no   1=somewhat   2=yes)

Question	Average (N=10)
Is the LLP able to assemble a neighborhood baseline across a range of indicators?	1.3
Is the LLP helping to initiate and advance the development of a locally-generated framework, strategy, or theory of change for *Making Connections* and NTFD?	1.2
Does the LLP have a plan to monitor and assess its own benchmarks, outcomes, and impacts?	0.8

CHAPTER 10: SUSTAINING THE WORK

QUICK OVERVIEW

Sustaining the Local Learning Partnership requires building capacity to keep up with current *Making Connections* demands as well as thinking about what happens at the end of the initiative.

The Foundation expects LLPs to sustain their work through continuing to build local relationships to integrate and leverage existing data; to solidify its operation as an effective team effort; to influence partners and others to work along the lines of LLP principles; to identify additional funding sources for desired community efforts; to assess itself regularly and address concerns; and to construct a learning agenda and engage in a wide variety of learning opportunities.

As should be obvious by now, Local Learning Partners have complex and demanding responsibilities. For LLPs to survive and thrive during the long-term run of *Making Connections*, they will need to continually renew and update their capacity.

The Foundation expects LLPs to sustain their work through continuing to build local relationships to integrate and leverage existing data; to solidify its operation as an effective team effort; to influence partners and others to work along the lines of LLP principles; to identify additional funding sources for desired community efforts; to assess itself regularly and address concerns; and to construct a learning agenda and engage in a wide variety of learning opportunities.

For example, data warehouses can be expensive to create and maintain. In sites that did not have an existing data warehouse to draw upon, the data warehouse may currently depend solely on Foundation funding. LLPs can be scouting for local funders and organizations that champion data work to increase the potential for sustainability of the data warehouse over the long term.

In the broader view, good data utilization in a community is driven by a culture of reflection and self-evaluation. The process of reflecting on results which demonstrate how far the work has come in comparison to the goals clarifies what is important and what shifts are needed. It also allows celebration and motivation among partners to continue.

If LLPs become so consumed in daily demands that they cannot step back to identify and address capacity-building concerns, they may find themselves drained of sufficient fuel for the long, complicated journey they have embarked upon. The LLP team members need to regularly replenish their relationships, resources, vision, tools, understanding, and support and encouragement.

Learning opportunities can include receiving technical assistance, providing technical assistance to other sites, peer-to-peer gatherings among sites, seeking guidance from the Foundation's evaluation liaisons, local and national conferences, and the ongoing learning among team members.

Peer Learning in New England

Hartford, Boston, and Providence LLP teams are meeting together to identify and create strategies for action on common topics, such as resident engagement and working in multicultural/multilingual communities. Their second session included a mini training session led by the Denver LLP coordinator.

HOW HAVE LLPS BUILT CAPACITY AND SUSTAINABILITY TO DATE?

LLPs report receiving and providing technical assistance across all major activity areas. The breadth and extent of technical assistance provided indicates a rich resource for peer learning.

FIGURE 17: PERCENT OF TECHNICAL ASSISTANCE GIVEN OR RECEIVED BY LLPS RELATED TO KEY TOPIC AREAS
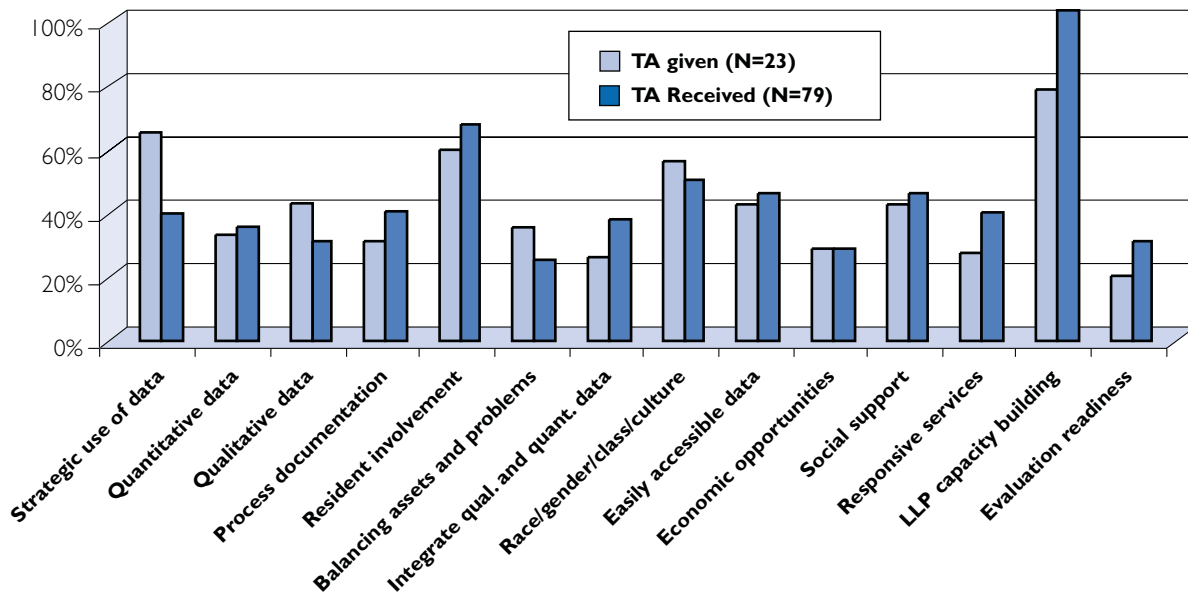
In addition to seeking or providing technical assistance, LLPs reported on the extent to which they have addressed various sustainability questions.

TABLE 22. CAPACITY AND SUSTAINABILITY (SELF-ASSESSMENT OF LLP)

(0=no   1=somewhat   2=yes)

Question	Average (N=10)
Does the data warehouse have a long-term sustainability plan for both funding and operation?	0.5
Is the LLP attempting to identify or leverage additional funding sources for related work?	1.05
Is other local research being leveraged or integrated (e.g., pre-existing surveys)?	1.1
Is the LLP attempting to identify specific needs for technical assistance? (Does the LLP have its own learning agenda?)	0.95
Is the LLP utilizing technical assistance?	0.9
Is the LLP providing or able to provide technical assistance to other sites?	0.85
Is the LLP communicating or attempting to network with LLPs in other cities?	1.4

CHAPTER 11: WILL EFFECTIVE USE OF DATA HELP *MAKING CONNECTIONS* SUCCEED?

QUICK OVERVIEW

Local Learning Partnerships have been given the responsibility to contribute to *Making Connections* in ways that could tip the balance of its success.

LLPs will need to continue to remain flexible through inevitable shifts in roles and responsibilities while maintaining their core functions.

The Foundation has invested heavily in its belief that access to data by communities and strategic use of data by all involved in *Making Connections* are pivotal factors in its family strengthening/neighborhood transformation initiative.

Local Learning Partnerships are using and creating a number of routes to test those beliefs in their *Making Connections* sites. Some have been able to build on existing infrastructure and connect with organizations at their sites with similar missions. Others have embarked on a journey to create infrastructure and recruit traditional and non-traditional partners to the table. In both cases, LLPs have already expanded their own view and that of their partners around the power of data and the need to provide community members with ownership of information that affects their lives.

To a great extent, the fate of LLPs is tied to the course and outcome of *Making Connections*. Yet, this is not a one-way street, as LLPs have been given the responsibility to contribute to *Making Connections* in ways that could tip the balance of its success.

If LLPs are able to work with residents and community organizations to provide information that leads to the development and honing of effective family strengthening strategies, it is much more likely those strategies will produce their anticipated outcomes. If LLPs create an information flow on the process and outcomes of *Making Connections* in ways that allow timely course corrections, it is again more likely that strategies will reach their desired end. If LLPs work with residents to communicate data that fuels grass-roots action, they are building the capacity of communities to claim power over their lives and neighborhoods.

LLPS COULD TIP THE BALANCE IN THE SUCCESS OF *MAKING CONNECTIONS*

Helping Making Connections Succeed

CHAPTER 11

The strengthening of a focus on results and evaluation may portend other adjustments in the development of *Making Connections*. Because this initiative is traveling in uncharted territory, it is predictable that there will be further unanticipated twists and turns.

The ability of LLPs to be flexible while remaining anchored in their core functions and roles may well be tested repeatedly.

Ultimately, the contribution of LLPs will be assessed in light of their ability to contribute to increased well-being of children and families in tough neighborhoods.

LLPS WILL NEED CONTINUED FLEXIBILITY WHILE MAINTAINING CORE FUNCTIONS

SOURCES

SOURCES

FOREWORD: THE EVOLVING ROLE OF LOCAL
LEARNING PARTNERSHIPS

Blueprint Conversation for Evaluation Work Going Forward, Annie E. Casey
Foundation, 2002.

*Building an Evaluation Framework for Making Connections: Report of a
Conference for Local Learning Partnerships*, Will Fay for the Annie E. Casey
Foundation, 2002.

*Questions & Answers about Local Learning Partnerships Learned by Evaluation
Liaisons during Phase 1*, Leila Fiester for the Annie Casey Foundation,
DRAFT: June 13, 2002.

CHAPTER 1: INTRODUCTION

*Committing to Results & Celebrating Progress: Making Connections' Transition to
Phase 2*, Leila Fiester for The Annie E. Casey Foundation, June 2002.

Family Strengthening Resource Guides series - preface, Technical
Assistance/Resource Center of the Annie E. Casey Foundation, 2001.

Framework for Process Documentation Within Making Connections Sites, Draft
memo by Leila Fiester for The Annie E. Casey Foundation. Circulated at
January, 2002 survey and evaluation meeting.

http://www.aecf.org/initiatives/ntfd/index.htm

Making Connections and The Annie E. Casey Foundation, Seattle Making
Connections, 2001.

Making Connections: Frequently Asked Questions, The Annie E.
Casey Foundation.

Making Connections: Local Learning Partnership, The Annie E. Casey
Foundation, 2000.

*Using Data to Promote Family Strengthening: Report of a Conference for Local
Learning Partnerships in Making Connections Sites.* The Annie E. Casey
Foundation, 2002.

CHAPTER 2: MODELS AND CONCEPTS THAT SHAPE THE FOUNDATION'S EXPECTATIONS OF LOCAL LEARNING PARTNERSHIPS

Making Connections Phase 2: Consultative Session on the Candidate Review Process, The Annie E. Casey Foundation, September 13, 2001.

National Neighborhood Indicators Partnership web site, http://www.urban.org/nnip/

Neighborhood Indicators: Taking Advantage of the New Potential, G. Thomas Kingsley, National Neighborhood Indicators Partnership, The Urban Institute, 1998.

The Annie E. Casey Foundation, http://www.aecf.org/kidscount/

Using Data to Promote Family Strengthening: Report of a Conference for Local Learning Partnerships in Making Connections Sites. The Annie E. Casey Foundation, 2002.

CHAPTER 3: MIND SET AND SKILL SET NEEDED BY LOCAL LEARNING PARTNERSHIPS

Blueprint Conversation for Evaluation Work Going Forward, Annie E. Casey Foundation, 2002.

Questions & Answers about Local Learning Partnerships Learned by Evaluation Liaisons during Phase 1, Leila Fiester for the Annie Casey Foundation, DRAFT: June 13, 2002.

CHAPTER 4: ISSUES THAT CUT ACROSS ALL TYPES OF DATA ACTIVITIES

Resident Engagement

Building Community Capacity to Use Information: A Framework, Terri J. Bailey for the National Neighborhood Indicators Project, The Urban Institute, October 1997.

Doing Community-Based Research: A Reader, compiled and edited by Danny Murphy, Madeleine Scammell and Richard Sclove of the Loka Institute, August 1997.

Family Circles: Sharing Our Experiences. Phyllis Rozansky for the Annie E. Casey Foundation.

"Involving Adolescents in Participatory Research," *Community Youth Development Journal,* Gregory J. Matysik, Volume 1, No. 4, Fall 2000.

"Making a Difference with Data," *Insites,* Annie E. Casey Foundation, Spring 2001.

Reflections on Community Organizing and Resident Engagement in Rebuilding Communities, Bill Traynor, November 2000.

Residents Engaged in Strengthening Families and Neighborhoods, Technical Assistance/Resource Center of The Annie E. Casey Foundation, 2001.

Stories: Using Information in Community Building and Local Policy, expanded edition, National Neighborhood Indicators Partnership, The Urban Institute, July, 1999.

The Seattle/King County Making Connections Study Circles: A Report on the Vision, Process, and Learnings of Two Study Circles. Pramila Jayapal for the Annie E. Casey Foundation, January 2001.

Youth Asset Mapping. The Academy for Educational Development at the Center for Youth Development & Policy Research, http://cyd.aed.org/cym/tensteps.html.

Race, Ethnicity, Culture, Class, Gender and Power

Issues and Challenges in Building Partnerships Between Academic Institutions and Community-Based Organizations, Aida L. Giachello, University of Illinois at Chicago, presentation at 2001 LLP conference.

"Researcher and Researched –Community Perspectives: Toward Bridging the Gap," Sullivan et. al., *Health Education and Behavior,* Vol. 28 (2): 130-149, April 2001.

Researcher versus Resident: Issues of Race, Class, Culture and Power in Evaluation, Nirbhay N. Singh, Virginia Commonwealth University, presentation at 2001 LLP conference.

Using Data to Promote Family Strengthening: Report of a Conference for Local Learning Partnerships in Making Connections Sites. The Annie E. Casey Foundation, 2002.

Balancing information on problems and strengths

Building Communities from the Inside Out, John P. Kretzmann and John L. McKnight, Northwestern University, 1993.

Mapping Your Community: Using Geographic Information to Strengthen Community Initiatives, U.S. Department of Housing and Urban Development, 1997.

Neighborhood Indicators: Taking Advantage of the New Potential, G. Thomas Kingsley, National Neighborhood Indicators Partnership, The Urban Institute, 1998.

Using Data to Promote Family Strengthening: Report of a Conference for Local Learning Partnerships in Making Connections Sites. The Annie E. Casey Foundation, 2002.

Integrating Quantitative and Qualitative Data:

Building an Evaluation Framework for Making Connections: Report of a Conference for Local Learning Partnerships, Will Fay for the Annie E. Casey Foundation, 2002.

Mapping Your Community: Using Geographic Information to Strengthen Community Initiatives, U.S. Department of Housing and Urban Development, 1997.

Getting Information Out in Different Ways

Using Data to Promote Family Strengthening: Report of a Conference for Local Learning Partnerships in Making Connections Sites. The Annie E. Casey Foundation, 2002.

Using Strategic Communication to Support Families, an Annie E. Casey Foundation Technical Assistance/Resource Center Resource Guide (contains examples and resources).

You Can Use Communications Principles To Create Culturally Sensitive and Effective Prevention Materials, CSAP Communications Team, National Clearinghouse for Alcohol and Drug Information, 1994, http://www.health.org/govpubs/MS494/index.htm

Sources

SOURCES

CHAPTER 5: USING DATA STRATEGICALLY

Mapping Your Community: Using Geographic Information to Strengthen Community Initiatives, U.S. Department of Housing and Urban Development, 1997.

Neighborhood Indicators: Taking Advantage of the New Potential, G. Thomas Kingsley, National Neighborhood Indicators Partnership, The Urban Institute, 1998.

Strategic Use of Information and Community Use of Evaluation, memo and attachments (NNIP Experiences, Case Studies of Neighborhood Data Utilization), Audrey Jordan and Tom Kelly of the Annie E. Casey Foundation, May 31, 2002.

Using Data to Ensure Accountability: Building Capacity for Local Decisionmaking (Number 6 in a series of Learning Guides), developed by the Center for the Study of Social Policy and partners, June 2001.

Using Data to Promote Family Strengthening: Report of a Conference for Local Learning Partnerships in Making Connections Sites. The Annie E. Casey Foundation, 2002.

CHAPTER 6: QUANTITATIVE INFORMATION: BUILDING A DATA WAREHOUSE

The Data Warehouse: Assessing Local Capacity, Annie E. Casey Foundation internal document, May 19, 2000.

Data Warehouse Assessment – Phase II-Cohort I Sites, Delia Carmen and Tony Hall of the Annie E. Casey Foundation, February 6, 2002.

Data Warehouse Considerations, Delia Carmen and Tony Hall of the Annie E. Casey Foundation, memo dated February 16, 2000.

Data Warehouses: Examples of Eleven Projects in Ten Cities, excerpted from a resource guide produced by the Harvard Family Research Project. Author and date unknown; provided by Tom Kelly of the Annie E. Casey Foundation.

Making Connections Indicators Database: Functional Specifications, Delia Carmen and Tony Hall of the Annie E. Casey Foundation, March 5, 2002.

National Neighborhood Indicators Partnership web site,
http://www.urban.org/nnip/

Neighborhood Indicators: Taking Advantage of the New Potential,
G. Thomas Kingsley, National Neighborhood Indicators Partnership,
The Urban Institute, 1998.

*Mapping Your Community: Using Geographic Information to Strengthen
Community Initiatives,* U.S. Department of Housing and Urban
Development, 1997.

*Setting a Community Agenda: Building Capacity for Local
Decisionmaking* (Number 3 in a Series of Learning Guides), devel-
oped by the Center for the Study of Social Policy, June 2001.

*Using Data to Promote Family Strengthening: Report of a Conference
for Local Learning Partnerships in Making Connections Sites.* The
Annie E. Casey Foundation, 2002.

CHAPTER 7: QUALITATIVE DATA

*Designing & Conducting Ethnographic Research: (1) Ethnographer's
Toolkit,* by Margaret D. LeCompte and Jean J. Schensul, Walnut
Creek: Sage Publications, Inc., 1999.

*Moving Up is a Steep Climb: Parents' Work and Children's Welfare in
the Annie E. Casey Foundation's Jobs Initiative,* Roberta Rehner
Iverson, April 2002

*Using Data to Promote Family Strengthening: Report of a Conference
for Local Learning Partnerships in Making Connections Sites.* The
Annie E. Casey Foundation, 2002.

http://www.aecf.org/jobsinitiative/ethnography.htm

CHAPTER 8: DOCUMENTING PROCESS AND CHANGE

Basic Expectations for Cross-Site Process Documentation, Annie E. Casey Foundation, DRAFT: August 14, 2002.

Building an Evaluation Framework for Making Connections: Report of a Conference of Local Learning Partnerships, Will Fay for The Annie E. Casey Foundation, 2002.

Framework for Process Documentation Within Making Connections Sites, Draft memo by Leila Fiester for The Annie E. Casey Foundation. Circulated at January, 2002 survey and evaluation meeting.

Making Connections Phase 2 Learning Network: Summary of the June 10, 2002 Meeting, Leila Fiester for the Annie E. Casey Foundation.

Process Documentation workshop session at 2001 LLP Conference, Prudence Brown and Nancy Ashley.

CHAPTER 9: EVALUATION

Blueprint Conversation for Evaluation Work Going Forward, Annie E. Casey Foundation, 2002.

Building an Evaluation Framework for Making Connections: Report of a Conference for Local Learning Partnerships, Will Fay for the Annie E. Casey Foundation, 2002.

Evaluating Making Connections: Cohort 1 Joint Convening (PowerPoint presentation), Annie E. Casey Foundation, June 10, 2002.

Presentation and background materials from Conference for Local Learning Partnerships, Annie E. Casey Foundation, January 31-February 1, 2002.

Questions & Answers about Local Learning Partnerships Learned by Evaluation Liaisons during Phase 1, Leila Fiester for the Annie Casey Foundation, DRAFT: June 13, 2002.

APPENDICES

APPENDIX A

LOCAL LEARNING PARTNERSHIP PROFILES

INTRODUCTION

This Appendix provides profiles of the ten Cohort 1 and Cohort 2 Local Learning Partnership (LLP) sites, as well as for Boston. A customized funding strategy was developed for Boston after the data for Profiles were compiled for this Guidebook. These profiles are based on self-reports from LLP Coordinators through data collection tools used by Heliotrope in the spring and summer of 2002. The profiles cover the following topics:

» Name and contact information for the LLP coordinator

» How the LLP got started

» Existing infrastructure that LLP was able to build upon

» Current focus of work

» Areas of expertise in which the LLP could provide technical assistance to other LLPs

» Accomplishments

» Challenges/lessons learned

» Vision for the future

Profiles are presented alphabetically on the following pages:

The profiles indicate that each LLP is unique in its history, developmental stage, strengths, accomplishments and challenges. No LLP's approach is easily summarized or categorized. However, some themes emerge:

» Most had an existing infrastructure to build upon

» Composition of LLPs reflects mostly traditional data users and providers

» Most are struggling around engaging residents in LLP work

» There is considerable awareness and attention around issues of race, ethnicity, culture, class, gender and power, but much more is needed to ensure LLP work reflects the diversity of its communities

» Data warehousing efforts are relatively strong

» LLP coordinators readily offer accomplishments, and were willing to be candid about challenges they face

With a few exceptions, at the time this data was gathered, many LLPs were still working to develop partnerships involving traditional data-holding organizations, community-based organizations and residents while at the same time working to develop a long-term vision and theory of change.

LLP team members can refer to these profiles to find a team that may have similar strengths or challenges. This information may help encourage cross-site idea-sharing and peer-to-peer technical assistance.

LOCAL LEARNING PARTNERSHIP PROFILE

BOSTON

LLP Coordinator: Charlotte Kahn

Annie E. Casey Foundation Evaluation Liaison: Tom Kelly

Contact Information

Charlotte Kahn

The Boston Foundation

75 Arlington Street, 10th Floor, Boston, MA 02116

617-338-2680 phone

617-338-1606 fax

cbk@tbf.org

History of Boston's Local Learning Partnership

How they got started:

In October 1999, The Annie E. Casey Foundation's Site Team Leader asked the Boston Community Building Network (BCBN) at the Boston Foundation to undertake the role of Local Learning Partner for *Making Connections* in Boston. The Community Building Network accepted this role on the condition that it could establish a learning partnership that could build on the excellent work of a number of groups and individuals with deep connections to the Dudley Street neighborhood. The Boston Community Building Network coordinator asked the coordinator of the Boston Children and Families Database at the Metropolitan Area Planning Council to join her in managing the Boston LLP. In late 1999, they met with representatives of groups in Boston's Dudley Street neighborhood asked by the Casey Foundation to come together to create a community-based response to *Making Connections*. At several meetings in the community, the Boston LLP was conceptualized as a set of short-term contracts with research organizations with a history or roots in the Dudley community. The Boston LLP sought to "harvest" and organize data and information resources based on prior work within and outside the community while the community organized its response to the *Making Connections* opportunity. The hope was that relevant data and information would then be available for use by the community in its agenda-setting process as it initiated its work of mobilizing families to set priorities for the *Making Connections* Initiative.

Existing infrastructure that LLP was able to build on:
The initial concept of the Boston LLP was to build on prior work. The Boston Community Building Network at the Boston Foundation had initiated the Boston Children and Families Database in the early 1990's to make data and information more accessible to residents and community-based organizations. With partners such as the Metropolitan Area Planning Council and Northeastern University, the Boston Community Building Network became founding members of the National Neighborhood Indicators Project at the Urban Institute. In addition, in 1995 they had begun to co-sponsor a biennial conference at Northeastern University, "Data Day: Using Data to Drive Community Change," as a way for residents and nonprofit organizations to come together to see new research and resources, to build skills and share knowledge.

The Boston Community Building Network had also initiated the Boston Indicators Project with the City of Boston's Sustainable Boston Initiative, releasing a report entitled, "The Wisdom of Our Choices: Boston Indicators of Change, Progress and Sustainability" in the fall of 2000. An asset-oriented framework of measuring community change, the report reflected the engagement of hundreds of Bostonians and contributions of data reporting from 150 community-based organizations, public agencies and area universities. In addition, the Boston LLP was able to tap a number of subcontractors with a deep history of work in the Dudley community, such as several research institutes at UMass/Boston, the Mauricio Gaston Institute for the Study of Latino Development and Public Policy and The McCormack Institute's Center for Social Policy, and MyTown, Inc., a group encouraging young people to learn and teach about local history. Several other partners, the South End Neighborhood Action Council, the Metropolitan Area Planning Council and Abt Associates have brought tremendous quantitative and mapping skills. These groups provided a range of expertise -- from qualitative to quantitative research, mapping of data, community history, and a commitment to participatory research and the transfer of research skills to residents.

Current Focus of Work

The current focus of the Boston LLP is to respond to requests for assistance from the community-based team, the Urban Village Working Group (formerly the Neighborhood-Based Team and now merged with the Dudley Street Neighborhood Initiative), and to support a learning agenda for the overall Boston *Making Connections* Team. Main activities include:

1. Continuing process documentation of the Boston *Making Connections* effort.

2. In response to the Community Resources and Collaboration Committee, gathering up-to-date information about the community's non-profit sector's services and resources and identification of places and ways – formal and informal – in which families in the community gather and communicate with one another in order to strengthen community-based outreach, recruitment and communication.

3. Work with the Family Outreach Committee of the Urban Village Working Group to organize Family Circles to identify community concerns and priorities, and identify resources of all kinds to strengthen families.

4. Production of a demographic profile of the Dudley neighborhood using the 2000 Census, as well as data and information produced by and about the community from a variety of sources.

5. Assistance to the Dudley Street Neighborhood Initiative in creating an index of their data and information resources to facilitate its use and accessibility.

6. Exploration of ways to gather and use information of interest to residents and create an accessible data warehouse.

7. An updated analysis of Family Self Sufficiency in the Dudley Street community using the 2000 Census.

8. Explore with the Dudley Street Neighborhood Initiative's Resident Development Institute a program to generate and use community-based information and data, including training opportunities for residents.

Areas of Expertise in which Boston could provide technical assistance to other Local Learning Partnerships

» Process documentation.

» Resident training and involvement in collecting, analyzing and using qualitative data and in organizing and facilitating Family Circles.

» Creating broad-based data partnerships and creating accessible tools for their use.

» Family Self-Sufficiency analysis and strategies.

» Coordinating a community-based conference highlighting local work on the use of data and information to drive change.

Accomplishments

» The ability to build on existing resources and tap into a variety of organizations and individuals with proven expertise and community-based experience connected to the Dudley Street Neighborhood for the LLP's initial work.

» Reaching agreement on a framework and methodology for process documentation. This is a sensitive topic, and can be much more useful and avoid future problems if trusting and respectful relationships are established, based on clear ground rules and an understanding of shared goals.

» Getting the LLP work more aligned in support of the goals and needs of the Neighborhood Based Team (now the Urban Village Working Group). This also ensures that LLP work will be focused on supporting the overall *Making Connections* team and that data will ultimately be tied to strategies that make sense in the community.

» Involvement and training of residents in research projects and building resident capacity – including the election of a resident researcher as Co-Chair of the community's *Making Connections* team.

» Developing an identity and a set of guiding principles for the LLP. This provides an internal philosophy developed by LLP members about its roles, approaches and relationships.

» Reflecting on lessons learned and working to create an inclusive learning community. This helps the LLP to see new possibilities and avoid repeating things that have not worked well so far.

Challenges/Lessons Learned

» Challenges and delays in the formation of the overall *Making Connections* team due to negotiations on roles and responsibilities of residents and various community-based organizations, public agencies, and citywide organizations.

» Lack of full capacity to manage and coordinate the LLP (including unanticipated staff changes at the Boston Foundation and Metropolitan Area Planning Council) given a lack of clarity about its role.

» At the same time the community was engaged in its own deliberations, there was not a clear sense that the LLP would be asked by the Casey Foundation to continue its work. This resulted in confusion about how to proceed and a reduced capacity to build connections among LLP members, and between the community and the LLP.

» Did not build the kind of internal LLP capacity that might have propelled the LLP forward faster because we wanted to be responsive to the community's direction and requests. At the same time, the community perceived the LLP as being "ahead" in terms of timing rather than responsive to its timetable.

» A community-based structure that created a separate Committee on Research and Data (CODAR) did not fully engage the attention of resident participants, who had higher priorities. This resulted in a continuing lack of communication between the Neighborhood Based Team and the Local Learning Partnership as well as in few opportunities to present products and work in progress, which in turn might have led to clearer plans to turn existing data into more useable and sharable forms. There was a lack of agreement on forms in which data and information would be most useful and accessible.

» The "gray area" for an LLP Coordinator between the need to provide leadership, yet at the same time be flexible and responsive about the structure and approach of the LLP. This can result in confusion and lack of clarity of what is needed and expected by whom, with a great deal of learning through trial and error and the school of hard knocks.

Vision for the Future

The Boston LLP's vision for the future is encapsulated in the Statement of Principles outlined below:

1. Boston's Local Learning Partnership (LLP) consists of researchers and technical assistance providers who collectively provide their assistance to the Neighborhood Based Team (NBT) (now called the Urban Village Working Group, or UVWG) in the Dudley Neighborhood of Boston. We will work with the Neighborhood Based Team to support a community-driven learning agenda.

2. Our hope is to build, with the Neighborhood Based Team, a strong learning community with a spirit of trust and mutual cooperation. We recognize and respect that each participant involved in this learning community has as much to learn as to share.

3. The LLP will work to transfer skills, knowledge, and information to residents by supporting capacity building around the value of, access to, and use of data and information as tools for change. Wherever possible, we will engage residents as researchers with the goal of adding more residents as learning partners.

4. We will help the community maximize the impact of data and information to achieve community goals. We believe that research is not just numbers or traditional census data, and that each type of research has its limitations and potential for misuse.

5. We will learn with the community about using different tools to achieve specific research goals in a multicultural, multi-ethnic, multilingual context.

6. With the direction of the Neighborhood Based Team, the Local Learning Partners will work together to plan projects, provide regular feedback and support during the projects, and take shared responsibility for completing projects successfully. We welcome community input and strive to make our processes and products open and accessible to all.

7. We are committed to renewing the LLP as a resource that can support the needs of the community by engaging new partners, including residents.

LOCAL LEARNING PARTNERSHIP PROFILE
DENVER

LLP Coordinator: Terri Bailey

Annie E. Casey Foundation Evaluation Liaison: Audrey Jordan

Contact Information
Terri Bailey
The Piton Foundation
370 17th Street, Suite 5300, Denver, CO 80202
303-825-6246 phone
303-628-3839 fax
tbailey@piton.org
www.makingconnectionsdenver.org

History of Denver's Local Learning Partnership

How they got started:
In 1999, the Annie E. Casey Foundation approached the Piton Foundation
to convene the LLP in Denver. Casey had previously funded Piton's data
initiative as part of their support of the National Neighborhood Indicators
Partnership. In keeping with the resident-driven approach of *Making
Connections* Denver and Piton's own interests in moving their eight-year old
data initiative into community hands, Piton proposed convening an all-
resident LLP and Casey agreed.

In late 1999, early 2000, *Making Connections* Denver was in the process of
identifying and convening residents for a number of efforts (summit
planning committees, small grants committee, and the LLP). Through
outreach in neighborhoods, working through residents and others we
already knew, referrals from other residents, etc. the LLP identified a
number of residents and brought them together to form two
Neighborhood Learning Partnerships, one in the Cole neighborhood and
one on the west Side of Denver. The three west side contiguous neighbor-
hoods of La Alma Lincoln Park, Baker, and Sun Valley had decided to join
together into their own LLP (Westside). Throughout the rest of *Making
Connections* Denver, La Alma, Lincoln Park and Baker work together; Sun
Valley (which is separated from the other two Westside neighborhoods by
a major interstate) works on its own; and Cole which is located in
Northeast Denver also works on its own. The two LLPs remained separate
until September 2001, when they decided to join together into a cross
neighborhood LLP.

Both LLPs were convened by Piton Foundation staff (Terri Bailey and Matt Hamilton) who, from the beginning, served only as staff with the resident LLPs serving as decision makers. The resident-driven LLP assumed responsibility for strategic use of data, developing their own strategies, and operating principles. The Piton Foundation, which already had a functioning data warehouse, manages that as well as the emerging process documentation.

Existing infrastructure that LLP was able to build on:
The Piton Foundation had a functioning data warehouse which freed them up to invest their time in the staff intensive process of working with residents to create and implement their own learning agenda. They also convened a 'resource team' of researchers, data providers, technology providers, and others to serve as support to the LLP. However, the LLP quickly developed their processes for contracting out key LLP projects which in effect resulted in the resource team and others working individually with the LLP rather than as a group. There were and are no other institutional 'partners' to the LLP. Other relationships already in place to support Piton's data warehouse remained in effect as they do to this day.

Current Focus of Work

Three goals guide the work of the Denver LLP:
1) Collect data and information about the *Making Connections*' neighborhoods of Baker, Cole, La Alma/Lincoln Park and Sun Valley; 2) capture the lessons learned from the work of *Making Connections*; and 3) build the skills and abilities of residents to be leaders in their communities.

Currently, the Denver LLP is engaged in the following focus areas to carry out those goals:

1. Expanding the data warehouse to include additional data needed to support the community organizing

2. Establishing a learning communications and marketing plan for the Community Learning Network

3. Addressing the digital divide

4. Expanding Story circles

5. Technical assistance and training to resident leaders (three trainings are planned before the end of the year including grantwriting, facilitation, and training of trainers. Community organizing training is ongoing)

6. Developing a documentation process, including resident diarists, for *Making Connections* Denver

7. Denver Benchmarks – the next generation of Piton's 10-year old data initiative

8. Sponsoring periodic research on major issues or concerns in the community (for example, a survey of parents with children in an 11-school feeder pattern to support the school reform efforts underway)

9. Developing the local evaluation plan for *Making Connections – Denver.*

Areas of Expertise in which Denver could provide technical assistance to other Local Learning Partnerships

» Acquired relevant neighborhood-level information from a variety of sources

» Geocoding data to a neighborhood level

» Conducting geo-analysis and producing mapped data

» Including community members in LLP structure or operations

» Involving residents in the collection, analysis, presentation, and dissemination of data

» Identifying or addressing digital divide issues

Accomplishments

» Convening, keeping, and forming a team of residents who understand the power of data and information and recognize that they are part of and contributing to a learning community. Denver's LLP just celebrated its 2-year anniversary. The relationships we have built with each other sustain us through very difficult times and incredibly demanding work.

» Development of a powerful relationship building tool – Story Circles – which was entirely resident created and implemented and is compatible with the focus on community organizing, and useable by youth, adults, immigrants, etc. Residents did their own research on story telling models and adapted their own story circle model, developed and implemented their own training program, and have trained adult and youth facilitators to conduct story circles. Story circles have been invited into public housing (where we were otherwise not successful in gaining entry), have been adapted by youth for youth, and are also being employed by systems (such as foster care) to transform the services they provide.

» Increased awareness of role of technology in the community and the ownership and development of a *Making Connections* Denver Internet and Intranet site as well as the creation of multiple community-based digital divide efforts in the LLP communities. Residents led the work and worked closely with a web development firm to design the web site, creating complex neighborhood portals that house neighborhood data, calendars, news, resource directory and maps. The LLP hosted a web site kick off celebration attended by 200 neighborhood residents and other stakeholders.

» Led the way in utilizing resident staff for *Making Connections* Denver. Working with partnering organizations, two resident LLP members now work as Story Circle community staff, one as full-time TARC liaison, and two as community organizers (one of whom also serves as Story Circle staff).

» Integrated the LLP effectively into the larger *Making Connections* Denver initiative. LLP staff meets every two weeks with the full Denver Team (cross project staff to the initiative) and have daily access to other key *Making Connections* Denver staff and work.

» Had an impact on other organizations and institutions to change the way they do business. For example, Piton has greatly modified its own data warehouse and now makes online and written data products available in Spanish and English. Piton has adopted community organizing into its own program development activities. Other area community organizers are embracing story circles into their model.

Challenges/Lessons Learned

» Moving from resident learners to a learning community. Having a few strong resident leaders isn't enough. Far more people need to see themselves as learners, teachers, and able to influence policy and action in order to transform neighborhoods. We must create new models that bridge adult learning, organizational learning, culture-based learning, and learning community theories into one.

» Not burning out the residents and ourselves. As active learners, these resident leaders are irreplaceable. We can bring more along but can't lose the ones we have. The burden is overwhelming for staff and resident members. We are at a critical juncture for both.

» Managing translation challenges. Not only have we not bridged consistent and available translation into Vietnamese, even translation into Spanish is very difficult given literacy, country of origin, and regional dialect challenges. Yet it is critical not just for communication but for demonstrating respect.

» The lack of seriously qualified community based researchers, particularly ones representative of the race, ethnic, cultural, language and class diversity found in our neighborhoods. The current state-of-the-art is still researcher led activity and rarely resident led activity where the researcher works under the guidance and expertise of residents. Rarely are the researchers or institutions credentialed in a community (rather being used to only having to be credentialed by universities or peers). They are trapped by training and institutional pressure (for money, publication, tenure, etc.) to operate in very traditional ways that don't work for multi-cultural communities leading their own charge.

» Constantly expanding the circle of those connected to the LLP. In 2001 the LLP was a group of 12 committed residents. This group has worked very hard to avoid the pitfalls of gate-keeping that any community group can succumb to. While they succeeded in serving as a bridge, rather than a gate, over time, they must identify strategies that bring more people into the work and strengthen the connections to organizing.

» Engaging youth. Youth have been difficult to engage, though everyone agrees it is critical. They are frequently bored with adult process, finding it heavy on talk and short on action. Where we have been the most successful is engaging them in specific activities (e.g., story circles, web site development). In the Cole story circle project, all the facilitators, trainers and participants are youth, yet we haven't been as successful at engaging them in the broader learning community.

» While creating a resident led learning agenda has been a major success, it is also a serious challenge. Working with residents in this way taxes us to be other than we have been trained to be, to build on trust rather than on skill or experience, to find our way in the dark.

» Developing a broad and internalized outcomes framework premised on a community vision. This has to come from the work, be contained as part of the work (rather than outside looking in), and has to be owned by resident leaders and other stakeholders. This requires time and integrity. Once developed, it must be able to set meaningful baselines and meet all the inherent quantitative and qualitative data challenges to track over time.

Vision for the Future

The LLP has a vision of a learning community with the Community Learning Network at its center. This virtual network will integrate LLP, TARC, and communications strategies into a community. Governed and increasingly staffed by residents, the Network will not only address the learning, skill building, and communications needs of the community but will actively engage residents in identifying community needs, sharing learning, and acting as teachers and experts. Many larger constituencies in the community will be engaged in trainings, policy forums, collecting and sharing data, and tool building. The resident leaders anticipate it will take most of 2002 to create the governance model, infrastructure, and processes for this network.

In addition to its work to collect and disseminate data, information and learning, the LLP increasingly views itself as an incubator; developing new tools, models, and knowledge needed to implement and advance the community's change agenda. This includes the creation of original models like the story circle program built by residents to support resident engagement, relationship building, and ultimately community organizing. It includes the development and dissemination of original tools for residents, such as the block party toolkit currently under development or the *Making Connections – Denver* Intranet and Internet site recently completed. It also includes the development of new skill building and training opportunities such as the Training of Trainers curriculum.

LOCAL LEARNING PARTNERSHIP PROFILE

DES MOINES

LLP Coordinator: Tim Shanahan

Annie E. Casey Foundation Evaluation Liaison: Tom Kelly

Contact Information

Tim Shanahan

Human Service Planning Alliance, United Way Des Moines

1111 Ninth Street, #100, Des Moines, IA 50314

515-246-6605 phone

515-246-6546 fax

tshanahan.hspa@unitedwaydm.org

History of Des Moines' Local Learning Partnership

How they got started:

In 1999, the then Human Services Planning Alliance (HSPA) Director, Ginny Hancock, and the Director of the Child and Family Policy Center (CFPC), Charles Bruner collaborated to develop a framework for the Polk County Learning Partnership presented in the funded proposal to the Casey Foundation. Tom Kingsley, of the Urban Institute, came in to present the philosophy of the LLP to a broad group of grassroots stakeholders, including neighborhood-based CBOs and neighborhood leaders. Through subsequent meetings and interviews of over 30 grassroots leaders, an ad hoc planning group was formed to assist in the development of the Resident Research, Analysis, and Action Network.

Existing infrastructure that LLP was able to build on:

The Human Services Planning Alliance provided the "community" side of the Polk County Learning Partnership, as it represented a broad group of government official, agency staff, private sector leaders, and service providers. Housed in United Way of Central Iowa, it represented a logical locus for the warehouse. The Child and Family Policy Center had strong experience and background in data analysis and use. The "missing element" was a point of connection to the diverse array of neighborhood organizations that themselves served as bridges into the neighborhood and the neighborhood's residents. While there were connections with individual organizations and neighborhood leaders, there was not connection to a group or organizational affiliation representing them.

Current Focus of Work

The current focus is to:

1. Broaden and formalize the Polk County Learning Partnership governance structure, expanding on the ad hoc planning group and adding residents.

2. Build a much stronger warehouse of data sets, and create a library of materials and resources that exist about Polk County.

3. Become the locus for ongoing work in defining Polk County outcomes and indicators.

Areas of Expertise in which Des Moines could provide technical assistance to other Local Learning Partnerships

» Acquiring relevant neighborhood-level information from a variety of sources and disaggregating by race, ethnicity, and other relevant subpopulations.

» Analyzing and disseminating data in formats that are understandable and useful to community

» Creating a process for responding to community requests for data

» Collecting qualitative information in the community on issues of economic, social, and service connections

» Residents and other stakeholder involvement in the development of LLP agenda or framework

» Developing an LLP framework designed to help advance the development of a neighborhood-based family strengthening movement

» Producing and disseminating products that can be read and understood by a variety of audiences - both in the community and other stakeholders

» Collecting and/or using information to help inform current policy questions and decision-making that affect families in tough neighborhoods

» Assembling a neighborhood baseline across a range of indicators

Accomplishments

» Selected data analyses that clearly show that both race and place affect child and family outcomes. Awareness is a precursor to change.

» Development of some connections with and building of trust with *Making Connections* neighborhood leaders and residents.

» Some additional capacity for using data and managing resources at the neighborhood level. Indigenous leadership and service implementation is needed for true change – the key to capacity building is not importing expertise from the outside.

» Some greater recognition of the need to listen to and connect to neighborhood leaders and organizations from Polk County power-holders. The larger community must invest in *Making Connections* neighborhoods and make these investments through neighborhood leadership and organizations.

Challenges/Lessons Learned

» The challenges are simply the flip side of the accomplishments. The glass is filling up, but is still half-empty.

Vision for the Future

The Polk County Learning Partnership:

1. Has data that consistently is used in planning by numerous groups in Polk County

2. Reinforces an outcomes framework in Polk County planning efforts at both community and neighborhood levels

3. Governance group is recognized as a powerful, resident-engaged entity by both residents in the MC neighborhoods and the larger community

LOCAL LEARNING PARTNERSHIP PROFILE

HARTFORD

LLP Coordinator: Victoria J. Dougherty

Annie E. Casey Foundation Evaluation Liaison: Tony Hall

Contact Information
Victoria J. Dougherty
Connecticut Policy and Economic Council
179 Allyn Street, Suite 308, Hartford, CT 06103-1421
860-722-2491 Ext. 21
860-548-7363
Dougherty@cpec.org
www.hartfordpl.lib.ct.us/llp/default.htm

History of Hartford's Local Learning Partnership

How they got started:
The *Making Connections* staff and consultants, after conducting a scan of the city's organizations capable of providing leadership and accessible technical resources, selected the organizations and individuals to populate the LLP in late 1999.

Existing infrastructure that LLP was able to build on:
The LLP is still working on building an infrastructure among the groups and organizations needed to do the actual work of an LLP and strategically use data that will mobilize family/neighborhood groups into action on salient quality of life issues. The LLP does have the potential of accomplishing this; however, it is still in the early developmental stages of determining its form and functions.

Current Focus of Work

The current focus is on

1. Clarifying the LLP's mission and vision

2. Planning to identify, recruit and integrate resident members

3. Establishing data and information sharing community based capacity building strategies on a Family Economic Success initiative

4. Planning the implementation and work plan for the Hartford Community Information Center (HCIC) to include confidentiality, ownership of data, data refreshing and management issues

Accomplishments

» Creation of an LLP web page. It was the first tangible product of the LLP.

» Enabled the development of the Hartford Community Information Center Collaborative and its affiliate partners to prepare an application for a planning grant. It will get the Center planning process off the ground and begin to create the needed infrastructure for a new community based data capacity.

Challenges/Lessons Learned

» The LLP and the Hartford Community Information Center are not yet two separate entities. The challenge lies in getting to a differentiated state where the two entities are clearly separate yet highly interactive and responsive to the community. The LLP has a full plate at this point in time. It is defining itself in terms of form, function and governance while at the same time contributing to the planning of the Hartford Community Information Center.

» Getting meaningful resident participation at the LLP table. The LLP is not well equipped to work closely with the diverse populations of the city. Much effort may be needed to find and orient a group of race/class and culturally diverse residents that are capable and interested in working with a group of professionals that comprise the current LLP.

» Selecting a data project(s). The LLP, in its current stage of development, may not be able to make these kinds of decisions. Resident input in the process is the main deficit at this time.

Vision for the Future

The LLP will be a place where learning about innovative community transformation models will take place. The LLP will become a primary source of data and technical assistance, information and support to community groups that will enable informed action to improve living conditions (housing, employment, safety and educational opportunities) for families and neighborhoods.

LOCAL LEARNING PARTNERSHIP PROFILE
INDIANAPOLIS

LLP Coordinator: Diane Pfeiffer

Annie E. Casey Foundation Evaluation Liaison: Cindy Guy

Contact Information

Diane Pfeiffer

Consultant working on behalf of United Way of Central Indiana

10132 Northwind Drive, Indianapolis, IN 46256

317-841-3103 phone

317-915-9824 fax

pfeifferdi@aol.com

History of Indianapolis' Local Learning Partnership

How they got started:

The Annie E. Casey Foundation approached the United Way of Central Indiana in 1999 with the LLP concept. United Way then recruited The Polis Center at Indiana University Purdue University Indianapolis as a collaborative partner. This LLP worked with Casey staff and consultants over a period of a year or more to gather data from the Social Assets and Vulnerabilities Indicators (SAVI) data warehouse and qualitative information from other sources, all of which was used by AECF in the determination of the *Making Connections* neighborhoods. The LLP continued to meet intermittently for several months, achieving certain outcomes, including a new edition of a Neighborhood Resource Directory. The LLP was reformed in the summer of 2001 when United Way approached new partners, the University of Indianapolis and the Indianapolis Neighborhood Resource Center, to become part of the LLP. A leadership change at United Way provided the opportunity and necessity of reformulating staffing responsibilities of the LLP. University of Indianapolis was assigned Process Documentation responsibilities and Indianapolis Neighborhood Resource Center was designated "Internal Coordinator" with the assignment of bringing residents from the two *Making Connections* neighborhoods into the LLP. Late in 2001, Martin University joined discussions as a partner.

Existing infrastructure that LLP was able to build on:
Both United Way of Central Indiana and The Polis Center have significant experience in data collection and analysis. These two organizations also partner in the management and maintenance of the SAVI database. SAVI is an extremely rich and highly complex resource, using geographic information systems (GIS) technology to manage multiple data sources describing the population, services, and landscape of Indianapolis. Many national observers, including the Annie E. Casey Foundation, have described SAVI as a unique resource, one which other cities could profitably emulate.

Current Focus of Work

The principal focus since October 2001 was to reform the LLP to ensure significant resident engagement. Until recently, AECF communicated to both Institutional and Neighborhood partners that neighborhood leadership and residents would have primacy in defining and directing LLP activities. However in the past month, we have realized that LLP clients include not only the two *Making Connections* neighborhoods, but also a citywide initiative, the Family Strengthening Coalition. In addition, the evolution of *Making Connections*, with a greater focus on data and results, encouraged AECF to formally designate their role as the fourth client of the LLP.

Areas of Expertise in which Indianapolis could provide technical assistance to other Local Learning Partnerships

- » Creating and maintaining a data warehouse, including acquiring relevant neighborhood-level information from a variety of sources, geocoding data at a neighborhood level, disaggregating data by race, ethnicity, and other relevant subpopulations and conducting geo-analysis to produce mapped data.
- » Planning and capacity to allow residents access to data held in the data warehouse independent of the LLP
- » Identifying or addressing digital divide in the community
- » Structure and operating principles for the LLP, e.g. composition of the LLP and roles of residents and institutional partners.

Accomplishments

» Data and information in support of the Annie E. Casey Foundation's *Making Connections* neighborhood selections. Neighborhoods were selected and this city moved into the next phase.

» Bringing diverse institutional partners together. Complementary strengths of United Way of Central Indiana, The Polis Center, Indianapolis Neighborhood Resource Center, Martin University and the University of Indianapolis hold potential to form learning networks to benefit neighborhoods and the city. Neighborhoods will provide important insights to institutional partners.

» Bringing neighborhood leaders and residents to the LLP. Challenges to recruiting neighborhood partners into the LLP have included time constraints on overtaxed neighborhood leaders. A deeper issue has been the experience of neighborhoods that have had data used against them in the past. The purpose of the LLP has seemed vague to residents, contributing to their hesitation to participate. Despite these challenges, neighborhood partners continue to meet with institutions to form a working LLP.

» Identification of new institutional partners. Neighbors have driven the identification and recruitment of a new institutional partner-Martin University-who they trust as a learning partner.

» Martindale-Brightwood Assets Survey. Residents created and implemented an innovative, community-based and driven data collection effort with minimal support by institutions.

» Neighborhood Resource Directory. The LLP contracted with the Information and Referral Network (IRN) to update a directory of human resource and governmental resources available to neighborhood organizations. The Directory was available in both a printed and CD-ROM version.

» Social Assets and Vulnerabilities Indicators Database. SAVI predates the LLP and most support for its maintenance and management comes from sources other than the LLP. AECF support helped allow United Way and The Polis Center to improve accessibility to SAVI, including the development of a web-based version, as well as extensive training of residents about SAVI.

Challenges/Lessons Learned

» Lack of clarity about LLP specifications and directions. *Making Connections* is a dynamic initiative. AECF has maintained a broad vision for *Making Connections* and its components, including the LLP. However, specifics around that vision have either been difficult to describe or seemed to have shifted several times.

» There was also some confusion (both in the neighborhoods and among the institutional partners) about the various roles of the numerous AECF staff persons and consultants involved with *Making Connections* and the LLP.

» A lack of written materials, such as guidelines or descriptions for the LLP. Clear, consistent, written expectations, goals, and specifications would help LLPs develop consistent structure and procedures. This would enable LLPs to build appropriate and effective partnerships that are sensitive to local culture, personalities, and conditions.

» Building trust between diverse people, organizations, and communities. Collaboration is difficult. Each of the local partners-- the neighborhoods of the Southeast and Martindale-Brightwood , the United Way, The Polis Center, University of Indianapolis, Indianapolis Neighborhood Resource Center, Family Strengthening Coalition, and Martin University- bring their own missions, goals, and constraints to the LLP. The individual situation of each of the partners, along with history and past relationships, influence their ability to reach out across barriers and build effective partnerships. The LLP will need the space and time to build that partnership locally.

» Scheduling issues around the many Annie E. Casey events sometimes presented challenges for both institutional partners and neighborhood residents.

» This initiative has generally been more time consuming than most would have predicted. Staffing issues may need to be reassessed given the amount of time it takes to participate in this project effectively.

» Overtaxing neighborhood residents as volunteers. The LLP requires a significant time commitment for neighborhood leaders with time demands from work, family, and other neighborhood responsibilities.

» Changes in neighborhood representation and leadership. Changes in LLP representation have slowed the process down as new participants are "brought up to speed."

» Staff turnover at United Way of Central Indiana. Two key staff members resigned from United Way, leaving a temporary void in understanding and facilitating the LLP.

Vision for the Future

For neighborhood residents and institutional partners to have a better understanding of conditions in the neighborhoods and to utilize information and knowledge to formulate data driven, results oriented programs that will be endorsed and supported by the LLP, neighborhood residents, funders and policy makers.

LOCAL LEARNING PARTNERSHIP PROFILE

LOUISVILLE

LLP Coordinator: Jonathan Lowe

Annie E. Casey Foundation Evaluation Liaison: Audrey Jordan

Contact Information

Jonathan Lowe

Community Resource Network

334 East Broadway, Suite 315, PO Box 406738, Louisville, KY 40204

502-589-6211 ext. 24 phone

502-584-3836 fax

JonathanL@crnky.org

www.crndata.org

History of Louisville's Local Learning Partnership

How they got started:

The Community Resource Network LLP began with informal conversations and meetings in 1999 and 2000 between of a number of governmental and non-profit organizations, all of whom recognized the value of creating an integrated community data center to make data available to a variety of users.

In July 2000, an informal partnership was formed. The group met on a regular basis through the rest of 2000, and determined that in addition to the collection of data, resident access and capacity building were necessary components of such an undertaking. The Community Data Partnership (CDP), as the group named itself, was awarded a planning grant from the Annie E. Casey Foundation in January 2001, and began an intensive, facilitated planning process, which included regular meetings of the expanding group of partners, a day-long session with Tom Kingsley from National Neighborhood Indicators Project/Urban Institute, and bi-weekly meetings of the volunteer Development Team, which worked through some of the more difficult aspects of the planning process. A community-wide, day long "Dialogue on Data," based on the AECF-funded Neighborhood Profiles, also informed the process.

Based on that work, the Community Data Partnership developed a business and operations plan that set forth a mission, goals, and principles, identified stakeholders and resources, set a budget, and addressed other key issues. The business plan became the basis of an application to the Foundation for an implementation grant, which was approved in September 2001. The Director of Planning began work on February 1, 2002. Additional staff began work on April 1, 2002.

During this process during the Fall and Winter of 2001-2002, the existing Community Resource Network staff, committee members, and a smaller committee called the Start-Up Task Force undertook work to make sure that Community Resource Network staff, once in place, would be able to move into an operational mode as quickly as possible.

Existing infrastructure that LLP was able to build on:
Louisville, Kentucky has numerous organizational resources which provide the foundation upon which the Community Resource Network Data Center (LLP) will be built, including:

1. The LLP is housed within the Community Resource Network, an eleven year old collaborative organization of city and county government, public schools, a major mental health service provider, regional and county planning entities, and Metro United Way, which produces and updates a comprehensive queriable database and published directory of social services in Metropolitan Louisville.

2. Partner agencies and organizations, the University of Louisville, and others have extensive, discrete databases of information that will form the initial foundation for the Community Resource Network Data Warehouse.

3. The Louisville and Jefferson County Information Consortium, has a huge set of GIS-based information on County infrastructure, to which the LLP has licensed access.

4. Non-profit organizations, including New Directions Housing Corporation, Metro United Way, Consensus Organizing Institute, UNCAL members, Louisville Community Design Center, Louisville Urban League and others are engaged in community building and neighborhood organizing work. CRN will work to become partners with these organizations engaging residents to access and use data to improve achieve their community goals and aspirations.

Current Focus of Work

The full complement of Community Resource Network staff have only been in place since early 2002. We are:

1. Developing work plan for the coming year

2. Developing initial action steps

3. Identifying Technical Assistance needs

4. Working to increase resident and minority representation in decision making structures

5. Building relationships with other non-profit community organizations

6. Collecting data from multiple sources

7. Developing organizational and administrative structures

8. Responding to information requests.

9. We also were co-sponsors of a community conversation on April 3, 2002 with 170 people led by Margaret Wheatley around the idea of improving the lives of families and children in our community.

Accomplishments

» Developing a strong, flexible, ambitious, feasible plan for the LLP, based on the input of many stakeholders in the community. The plan provides a framework for the work we are undertaking. The participation of multiple stakeholders in planning creates needed trust and local buy-in, improved the quality of the plan, and increases the likelihood of long-term sustainability.

» Hiring a highly qualified and diverse staff. A skilled and diverse staff increases effectiveness and enhances community credibility.

» Being intentional about building upon existing community resources whenever possible. Making connections between existing resources increases local support, builds trust between people, increases the overall value of the resources, creates new opportunities, and limits redundancy.

» Release of our first data product in May 2002, produced by Michael Price at University of Louisville, providing profiles of 26 Metropolitan Council Districts for merged Louisville Jefferson County.

Challenges/Lessons Learned

» Developing a leadership structure and a manner of operation that is representative of our community, based on race, class, gender, and culture, and that includes a high level active resident participation. Social stratification is ingrained, and structural. Thus, work to dismantle barriers to full civic and community participation must be intentional, particularly within organizations that have power and resources.

» Many of the original participants in the process have an institutional interest in the development of the LLP. Active participation by people who live in the neighborhoods in which we hope to effect change will keep the ideal of democratizing data in the forefront of all of our work. It is the driver toward meaningful change.

Vision for the Future

The Community Resource Network/Louisville LLP will:

1. Be the recognized source for accurate, timely, and relevant neighborhood-level community data for Metropolitan Louisville by neighborhood groups, non-profits, community leaders, government officials, research organizations, and other community members.

2. Be seen as a reliable, responsible, credible partner by all sectors of the community.

3. Have a fully operational data resource center with an electronic data warehouse, and an online data library and document center that provides access to information and resources to multiple audiences in formats they can understand.

4. Spend a substantial amount of its time and resources to empower community residents to increase their capacity to understand and use data toward positive change.

5. Have a leadership structure that is reflective of Louisville's racial, gender, class, and cultural diversity, and that will include community residents in all levels of planning, review, and implementations of its work.

6. Work with others to develop a set of shared community outcomes and indicators, and be the primary repository for tracking indicators over time. CRN will produce, on a regular basis, substantial, meaningful reports regarding the status of families, children, and neighborhoods in our community.

7. Work in a manner that encourages collaboration, and strengthens existing and new efforts by other groups and organizations to improve the lives of people in meaningful ways.

8. Develop a framework for organizational self-assessment and learning.

9. Document its work in a useful and accessible ways.

10. Provide services for a fee on a contract basis to business, industry and other non-community-based or partner entities.

11. Be fiscally self-sufficient and have a long-term plan for ongoing sustainability.

LOCAL LEARNING PARTNERSHIP PROFILE

MILWAUKEE

LLP Coordinator: Sharon Adams

Annie E. Casey Foundation Evaluation Liaison: Tony Hall

Contact Information
Sharon Adams
Nonprofit Center of Milwaukee
2819 W. Highland Blvd. Milwaukee, WI 53208
414-344-3933 phone
414-344-7071 fax
sharonfadams@earthlink.net
www.connectionsmilwaukee.org

History of Milwaukee's Local Learning Partnership

How they got started:
In November 2000, Dr. Dianne Pollard, facilitator to the LLP and professor at University of Wisconsin, convened the first LLP meeting. In attendance were representatives of community organizations, educators, residents, researchers, and Evaluation Liaison Tony Hall from the Annie E. Casey Foundation.

Existing infrastructure that LLP was able to build on:
Milwaukee's LLP was able to build upon the following existing structures:

1. The Data Center of the Nonprofit Center of Milwaukee

2. The Center of Urban Initiatives and Research at the University of Wisconsin-Milwaukee

3. Community organizations such as Community Village and Lisbon Avenue Neighborhood Development (LAND)

Current Focus of Work

LLP Milwaukee continues to build the capacity of organizations and residents in the *Making Connections* target community to use information strategically as they set priorities for action and reflect on the results of their efforts. Recent project focused on:

1. Family asset development (workforce studies, housing indicators, Earned Income Tax Surveys surveys)

2. Family engagement strategies (Family Foundations, Resident Leadership Council, Small Grants, Family Summit)

3. Clearinghouse data development (population demographics, housing, health and education indicators)

Areas of Expertise in which Milwaukee could provide technical assistance to other Local Learning Partnerships

» Creating and maintaining a data warehouse, including acquiring relevant neighborhood-level information from a variety of sources; geocoding data at a neighborhood level; analyzing and disseminating data in formats that are understandable and useful to the community; and responding to community requests for data.

Accomplishments

» Completion and dissemination of workforce studies. Identified areas for collaboration and capacity development between 20 local employment initiatives. Surfaced policy issues impacting a significant number of residents in gaining employment.

» Identification of family priorities for family strengthening. Focus groups, demonstration processes in family engagement, and a Family Summit provided a strong direction for further information needs and helped guide setting priorities for action.

» Development of an information clearinghouse. The clearinghouse data is taking on a format that will allow monitoring over time of key indicators for *Making Connections* Milwaukee such as population, housing, employment, family economics, education, safety, and health. We have good baseline data and/or an understanding where there are gaps.

» Survey of tax filers at Volunteer Income Task Assistance sites. The results provide a financial profile of filers who are often the families *Making Connections* Milwaukee targets for asset development.

Challenges/Lessons Learned

» Developing approach for establishing an LLP agenda or next generation of studies.

» Developing approach for reflecting on results. This effort is related to incorporating success indicators for families into the LLP work.

» Continuing to build the financial capacity and resource networks needed to carry out the LLP work.

» Strengthening the dissemination of information to all sectors, including families and *Making Connections* Milwaukee stakeholders.

LOCAL LEARNING PARTNERSHIP PROFILE
OAKLAND

LLP Coordinator: Junious Williams

Annie E. Casey Foundation Evaluation Liaison: Delia Carmen

Contact Information
Matt Beyers
Urban Strategies Council
672 13th Street, Oakland, CA 94612
510-893-2404 phone
510-893-6657 fax
mattb@urbanstrategies.org
www.urbanstrategies.org/LSAMakingConnections/

History of Oakland's Local Learning Partnership

How they got started:
Based upon the Urban Strategies Council's efforts over the years in working with community-based organizations in the use of data and as a National Neighborhood Indicators Partner (NNIP), the Council was invited to join the Oakland Collaborative and participate as the lead organization for the LLP.

Existing infrastructure that LLP was able to build on:
Urban Strategies Council has been doing LLP-type work for years: warehousing administrative and other data sets from the school district and city and county agencies; providing by-request analyses for local community-based organizations, residents and agencies; and publishing reports. The Council was one of the founding partners for the National Neighborhood Indicators Project (NNIP). UC-Berkeley Geographical Information System Center – Institute of Urban and Regional Development (GISC-IURD) (which is hosting the on-line warehouse) had also been working in this area. Many of those on the team had been involved with the Oakland-University- Metropolitan Forum and the Oakland Indicators Project in years past.

Current Focus of Work

Focus is on:

1. The initial release of the Oakland LLP's web site

2. Gathering additional and more useful data from agencies

3. Working directly with more agencies in developing products for the data warehouse

4. Development of indicators and benchmarks for the Outcomes Report

5. Continued gathering and analysis of housing data in response to the Lower San Antonio Collaborative's focus and priority on affordable housing in the MC neighborhood.

Areas of Expertise in which Oakland could provide technical assistance to other Local Learning Partnerships

» Conducting geo-analysis and producing mapped data

» Analyzing and disseminating data in formats that are understandable and useful to the community and other stakeholders

» Training local stakeholders in community building principles and practices and in use data and information to support action

» Collecting and/or using information to help inform current policy questions and decision-making that affect families in tough neighborhoods

» Leveraging and integrating other local research

» Assembling a neighborhood baseline across a range of indicators

Accomplishments

» Brought together the various groups now attending LLP meetings. People are thinking more about how to make "public" data truly available to the public and fostering the one-to-one relationships that are important in data sharing.

» Released timely data. Residents and community-based organizations have used these data in their projects.

» East Bay Asian Youth Center (EBAYC) survey development and analysis. Helped develop community-based organizations' research skills and used primary data for 'information for action'

» Launch of prototype for on-line data warehouse

» Development of Information Networking Forum of Oakland (INFo Oakland) as a citywide collaborative of data users, providers and community based organizations interested in research and data to support their work

Challenges/Lessons Learned

» Obtaining data sets from public agencies.

» Lack of common outlook on the project. Agencies don't necessarily see the benefits.

» Resident involvement is low.

Vision for the Future

To have:

» Better participation from certain public agencies

» Resident-driven priorities (most likely through the *Making Connections* initiative itself rather than directly through the LLP)

» A working, dynamic, growing on-line warehouse

LOCAL LEARNING PARTNERSHIP PROFILE
PROVIDENCE

LLP Coordinator: Shelly Weeden

Annie E. Casey Foundation Evaluation Liaison: Audrey Jordan

Contact Information
Shelly Weeden
The Providence Plan
56 Pine Street, Suite 3B, Providence, RI 02903
401-455-8880 phone
401-331-6840 fax
sweeden@provplan.org
www.provplan.org

History of Providence's Local Learning Partnership

How they got started:
In early 2000, the Annie E. Casey Foundation provided funding for the purpose of coordinating a Local Learning Partnership (LLP) in Providence as part of its *Making Connections* Initiative. Two neighborhoods – the South Side and the West End - were identified as primary locations for this effort. The Providence Plan serves as fiscal agent for and coordinator of the LLP and served as the convening agency.

From May through October 2000, The Providence Plan worked to lay the foundation for LLP development. Community assessments were conducted and ongoing community surveys were compiled. In addition, the agency discussed the concept and role of the LLP with 28 community based organizations. A statistical profile of these neighborhoods was developed with the assistance of the Providence Plan's continuing data-related work.

On November 14, 2000, a day-long information forum was convened at the John Hope Settlement House. At this session, staff from the Casey Foundation gave an overview of the *Making Connections* Initiative and the role of the Local Learning Partnerships within it. Expectations from the LLP were discussed and the components of an LLP mission statement were shared. The results of the preliminary work in Providence were also shared with the 45 attendees who represented 35 potential Local Learning partners.

Participants at the forum were not merely recipients of information, however. They were also asked for their input on a number of questions relevant to the operation of an LLP in the target neighborhoods.

The first of these – "What are the issues that need to be addressed in the *Making Connections* neighborhoods?" – generated a large number of responses within a number of issue areas. These areas included resident engagement, communication and technology, housing and physical environment, youth, community safety, respecting and managing diversity, economic opportunity/quality child care, quality services and collaboration, quality education, and quality health care.

The group went on to brainstorm about the information, knowledge and learning needs of community organizations and families and residents, as well as the processes, capacities, and relationships that need to be created by and for these constituents. The participants listed the building blocks already existing in the community, the challenges to be addressed in doing this work, and potential next steps.

Information gathered at this meeting was organized and distributed. The Providence Plan developed a work plan for the first 6 months of 2001 and continued to reach out to South Side and West End constituents throughout the winter and planned a late winter re-convening of interested parties.

On March 2, 2001, the first Local Learning Partnership meeting was held at the Wiggins Village Community Center. About 40 residents and organization representatives gathered to determine how to create a workplan for the upcoming year that would address the needs and issues raised at the November 14 meeting.

At this meeting, roles, responsibilities and expectations were delineated for The Providence Plan, the Partner organizations, resident leaders, residents of the neighborhoods, the Annie E. Casey Site Team and the LLP Coordinating Council, a new entity developed at this session. The group designed a timeline of activity for the year and participated in an information workshop "Knowledge Is Power" presented by a specialist from the Providence Plan.

As noted above, the structure of the LLP was also addressed at this meeting, and a Coordinating Council comprised of members of the LLP was created to ensure that the work would proceed smoothly and in a

timely fashion. The Providence Plan continued to staff the LLP and organized and distributed materials from this meeting.

Existing infrastructure that LLP was able to build on:
The Providence Plan had already begun developing a data warehouse

Current Focus of Work

Providence is focused on 8 areas:

» Create a Formal Structure for the LLP

» Neighborhood Indicator Development

» Technical Assistance

» Process Documentation

» Database Maintenance and Development

» Communication

» Linkages to Other Resources

» Resident Engagement

Accomplishments

» Development of Community Statistical Profile – Developing a community statistical profile for the neighborhood(s) in Providence designated as the focus area for the Casey Foundation's *Making Connections* initiative. Are collecting data in the content areas that are of interest to AECF, as well as information that is of interest to local stakeholders. Data collected is being used to develop cross-site as well as site-specific indicators for *Making Connections*.

» Administrative Data Collection – Gathering data from a variety of administrative sources to build a comprehensive neighborhood-level database (a.k.a. "data warehouse").

» Qualitative Research – We have collected data from various information-gathering efforts in the *Making Connections* neighborhoods, including surveys, study circles, focus groups, and workshops.

» Training Workshops – The workshop series address needs and priorities of partners, focusing on general capacity building in accessing and using information. The point of these trainings were/are to support the learning of residents and organizations, and to increase their access to information.

» Communications – The LLP is employing different ways to effectively communicate the LLP process and products. This includes making information available in different languages, using the latest technology, using door-to-door communications, and using resources available to make the aforementioned possible.

» Process Documentation – Hired process documenters to work with the LLP Coordinating Council to develop a creative plan for documenting the development of the LLP and how it relates to the broader *Making Connections* Initiative; help those involved learn, plan, and draw lessons from their efforts; and help to make connections. The process documenters are residents of the targeted neighborhoods who were trained to do this work.

» Indicator Development – The LLP has provided an introduction to Indicators and Outcomes with a workshop entitled "Measuring Neighborhood Improvement."

» Resident Engagement – The LLP has been successful in disseminating information through workshops around specific topic areas, including "Community Outreach and Engagement" and "Strategic Use of Information." The LLP is also committed to hiring residents – 2 out of 3 staff members are residents.

» Diverse Partnership – The LLP's governing body consists of 30 members, many of whom are residents of the target neighborhoods; others are representing at least 24 different organizations. Ethnically diverse, the LLP Coordinating Council also represents many of the cultural groups residing in the two communities.

Challenges/Lessons Learned

Challenges:

» Lack of clarity regarding the Casey Foundation's needs and expectations initially.

» The tension between the Annie E. Casey agenda and the needs of the Providence Community

» Need for additional staff support.

» Need for consistent communication.

» Keeping the process open, while being more explicit and strict about participation requirements.

» Developing collaboration without competition.

» Creating a structure that accommodates the partners but is honest and flexible.

» Keeping residents engaged and interested in the structure.

» Affording proper translation for effective communication.

» Maintaining high energy levels from partners.

» Connecting to the broader *Making Connections* initiative.

Lessons Learned:

» Throughout initial efforts, all parties in the LLP initiative focused almost exclusively on strengths within the target communities. Challenges were identified only after all of the community assets had been documented. Such an assets-based process enabled the group to move forward positively, avoiding some of the difficulties/defensiveness often engendered by a deficit-based approach. There was a good deal of discussion about how to effectively engage all constituents, ensuring that the process didn't become too "top heavy."

» Work gets done in small groups; develop new committees as needed.

» Develop independent leadership; shift more responsibility from the implementing organization to the community.

» Formalize communication systems within the LLP so lapses are less likely to occur.

» Prioritize bringing community residents to the table as information providers and guides to the process.

» Stay concrete!

» Retain assets-based approach.

Vision for the Future

The vision of the Providence LLP is to accomplish our mission, which is to facilitate the *Making Connections* concept by which the West End/Southside families and neighbors will be able to share information and experiences in ways that enable them to access and benefit from economic opportunities, strong social networks, and quality support services.

LOCAL LEARNING PARTNERSHIP PROFILE

SAN ANTONIO

LLP Coordinator: Ray Garza

Annie E. Casey Foundation Evaluation Liaison: Tom Kelly

Contact Information

Ray Garza

Hispanic Research Center-University of Texas San Antonio

501 W. Durango Blvd., San Antonio, TX 78207

210-458-2976 phone

210-458-2655 fax

rgarza@utsa.edu

www.makingconnections.utsa.edu/mcsa/home.htm

History of San Antonio's Local Learning Partnership

How they got started:

Dr. Blandina Cardenas, then Director of the Hispanic Research Center (HRC) at University of Texas San Antonio, and the Annie E. Casey Foundation started the San Antonio Local Learning Partnership. Dr. Cardenas used her influence at the University and at the Foundation to create a mutually beneficial opportunity for the HRC and Casey. She also utilized her relationship with the Intercultural Development Research Association (IDRA) to involve them as a learning partner. IDRA left the learning partnership in the summer of 2001 with the promise to rejoin the LLP at some future time when the LLP focus is more on education; their primary arena of research and policy work. Since the summer of 2001 when the IDRA left the LLP, the HRC expanded the LLP by tapping into personnel who are members of the Partners Group (the local *Making Connections* site team) including representatives from COPS-Metro, the City of San Antonio, United Way, and Family Economic Success—San Antonio. We will also integrate representation from Alamo Area Community Information System and Alamo Area Workforce Development, the local subcontractor of the Texas Workforce Commission.

Existing infrastructure that LLP was able to build on:

The San Antonio LLP was not able to build on existing infrastructure of groups doing LLP-type work/data collection in the community. Few San Antonio organizations participated on a citywide basis to share data. In addition to the *Making Connections* LLP, Alamo Area Community

Information System (AACIS) has emerged. This is a consortium of organi-
zations dedicated to the collection, storage, and sharing of data in a twelve
county area. Although the *Making Connections* LLP is within the AACIS
target area, AACIS was unable to provide the in-depth and ground level
qualitative and policy components the *Making Connections* LLP desired. By
and large, the *Making Connections* LLP represented a new way of doing
business (gathering, using, and sharing data) for a specific geographic target
area, like San Antonio's Westside. The *Making Connections* LLP has and
continues to share data with AACIS whenever they have things in common.

Current Focus of Work

Our current focus is to:

» Prepare local neighborhoods to conduct surveys

» Finalize a list of indicators that will be used to measure change over
   the next 10 years and to gather baseline date for these indicators

» Work with the Center for Public Policy Priorities to develop a Family
   Security Index and a Family Economic Portfolio

» Prepare for the national cross-site survey to be conducted later
   this year

Areas of Expertise in which San Antonio could provide technical assistance to other Local Learning Partnerships

» Developing a data warehouse, including acquiring relevant neighborhood-level information from a variety of sources and geocoding to a neighborhood level, disaggregating by race, ethnicity, and other relevant subpopulations, producing mapped data, including qualitative data

» Information dissemination in formats that are understandable and useful to the community

» Developing a process for responding to community requests for data

» Conducting neighborhood surveys

» Collecting qualitative information on *Making Connections* communities and issues, particularly issues of economic, social, and service connections

» Resident involvement in the collection, analysis, and use of qualitative data

» Including community members in LLP structure and operations

» Including community members in review of LLP products and proposals for work

» Helping local constituencies to use data

» Involving residents in the collection, analysis, presentation, and dissemination of data

» Building the capacity of community residents to use and understand data or to ask questions regarding data

» Helping to build the capacity of stakeholders outside of the neighborhood (e.g., funders, city agencies) to use data strategically

» Collecting and/or using information to help inform current policy questions and decision making that affect families in tough neighborhoods

» Integrating quantitative and qualitative data collection, analysis, and research

» Attempting to identify or address any digital divide in the community

» Involving community based researchers or other ethnic or community-specific researchers

» Identifying or leveraging additional funding sources for related work

» Building a community friendly website

Accomplishments

» The *Making Connections*-San Antonio Website. This is a centralized site for gathering and disseminating information related to *Making Connections* San Antonio work. The three components of the site (Information and Referral, Planning and Program Development, and Community Activities) are crucial to representing the breadth and depth of our work. We provide practical asset-based information that will enable residents to learn and benefit from the many positive service providers and service-oriented businesses in their area. The quality of the information is much better than that received in a phonebook. The program development component provides administrative data organized in such a way as to stimulate critical thinking about the kinds of policies of inequity that need to be addressed. Finally, the community activities component, though not fully developed, is designed to be resident-driven.

» Assisted in the identification of the initial *Making Connections* target area and helped build a community demographic profile. This helped establish a specific geography to our work and a profile that became the baseline for community well-being and the identification of existing resources, services, and efforts at change.

» Assisted in convening the Neighborhood Family Summits. The summits were an ambitious endeavor that required the work, resources, will, and human power of many, many people. It enabled the Hispanic Research Center staff and research team to meet and work with people at the ground level. It aided in altering community perceptions about researchers because in working side-by-side with them there was an opportunity for exchange and the establishment of trust and working relationships.

» Conducted an in-depth analysis of the Neighborhood Family Summits. This gave us a methodology for bridging qualitative and quantitative analysis. Through the use of NVIVO software, Dr. Raquel Marquez was able to fully utilize our transcripts of summit focus groups and work sessions to document the frequency and emergence of key themes in focused discussions regarding resident ideas for change and initial identification of strategies. Conducted independently, this work complemented and supported the less formal analysis that had already been conducted. These analyses became the basis to identify the long-term goals of our neighborhood transformation work. Finally, Dr. Marquez's work also identified some unevenness in the facilitation methods being utilized that can become the basis for refining future family summit discussion sessions.

» Conducted ethnographic study of West Side residents regarding their hopes and dreams for change as well as their identification of major

issues. Dr. Ramos' on-going in-depth interviews with residents include both residents who are involved in the *Making Connections* initiative and those who are not. His outreach efforts includes many residents who are less likely to be involved in community based organizations, neighborhood groups, etc., but whose lives are directly impacted by policies and practices of institutions and service providers.

» Assisted in the production of the *Making Connections* Bulletin. The *Making Connections* Bulletin was produced as a communication vehicle in the aftermath of the Neighborhood Family Summits. It was the fulfillment of our assurance to residents that we would document their participation and expression of concerns. It became a way to inform them of the results of summits across all five sectors of our target area. It was also a means of synthesizing and delivering information to them in an easily accessible manner. The bulletin was sent to all resident participants of the Neighborhood Family Summit process as well as institutions who participated in the *Making Connections* All City Summit the prior year. The LLP provided reports, charts, maps, graphs, and visual documentation from and about the summits.

» Led the identification and articulation of Phase 2 Markers. (This could also be listed as one of our biggest challenges.) From the time we were notified that we were a potential Phase 2 site in the Fall of 2001 until the "Committing to Results" conference in early March 2002, the LLP began developing a matrix and timetable for the collection of data related to 16 key areas of change. From the outset, an integral part of our interest in producing markers that would serve as the measure of the effectiveness of our efforts was resident validation. A mandate by the Foundation required that we attach specific numeric goals before this process of resident validation could occur, so we used our best, "informed" estimates with partner and team input to put forth a preliminary template articulating our 3, 5, and 10 year goals.

» Participating in the construction of a San Antonio Family Security index. This is an ongoing endeavor being conducted in conjunction with the Center for Public Policy Priorities in Austin. It is an offshoot of a report the CPPP produced entitled "What It Takes to Live in Texas." We are working with them to develop a deeper, more localized Family Security Index and Family Financial Portfolio with special focus on our target area. It will enable us to account for real expenses and real wages, as well as other forms of assets, to better assess how people survive in an economically depressed area. It will serve as an instrument for residents and employers alike to use in determining a livable income and other forms of support that can and should be utilized to enhance their standard of living.

Challenges/Lessons Learned

» Building a sustainable Local Learning Partnership. Working in collaboration is NOT the standard way of conducting business. Like much community service work, research in this city is often conducted in isolation from other work and is mostly disconnected from social change efforts.

» Integrating work with and building cooperation among other local data warehouse initiatives. Because no protocol exists, there is legitimate concern about protecting the integrity of data. Though preliminary discussions regarding the creation of data sharing agreements among data collecting agencies have occurred, and some data sharing does occur, some of the key players have yet to resolve these concerns/issues at the upper administrative level. There exists a degree of distrust and competition among some agencies. The result of the above is duplication, inefficiency, and incommensurability among our work, thereby making community accessibility to data more difficult to achieve.

» Local investment in the LLP. As a university research center, the lead local learning partner has a mandate to pursue external resources. We are the only "traditional" research partner at the table at this point. Other partners include the City of San Antonio, United Way, Alamo Workforce Development, and COPS/METRO. Each of these entities uses data for strategic planning, action, and programmatic purposes. How we gather, analyze, and disseminate data varies. Of the current partners, only the City and United Way are in a position to be potential investors in our work. Investing in research that is not linked to an immediate and specific outcome/project and timeline requires a shift in the way these entities conduct business and understand investment.

» Integrating residents into LLP work. There is little coordination between LLP work and resident generated projects stemming from *Making Connections* San Antonio. Though the LLP offers technical assistance as needed, our projects are viewed as discrete and the connection between short-term and long-term objectives is not clear. There has been interest, willingness, and belief that closer, clearer integration needs to occur, but when, how, and who should coordinate this has been the basis of disagreement among members of the local site team. Genuine integration of residents into our work also raises questions about division of labor, resident compensation, dissemination, control, and packaging of data, meeting times, decision making about what we analyze and assess, and so on.

» Difficulty in consolidating university support at the upper administrative level. As a growing university undergoing a transition from a primarily teaching institution to a research institution, UTSA measures research by the amount of external funds brought into the university. Though the university has stated a desire to develop community partnerships, it is the relationships with the business community that are often given priority. The time-consuming and slowly evolving nature of our *Making Connections* work does not at first glance appear to be "cutting-edge" work to university administrators. Full support and understanding of our work by the university administration would enable us to more readily advance the idea of how important and possible it is to bridge to "town-gown" divide in this type of community building work. Moreover, in an ideal situation, the university would itself invest in the research by becoming co-investors in faculty researcher time, resources for residents, etc.

» Reconciling LLP methodologies and research philosophy with resident input and AECF mandates for the delivery of data and projections for social change. The Casey Foundation has compiled a wealth of material on theories of social change, the strategic use of data, markers on neighborhood and family well-being, etc. They have also expressed a philosophy that gives primacy to community ownership and site-generated, site specific strategies for research and planning. However, despite this philosophy, their own frameworks of analysis, reports, and mandate for specific projections of change, are often counter to local approaches and at times, feel counter-productive because two research agendas and methodologies must be maintained even when they are not compatible.

Vision for the Future

Our vision of the San Antonio LLP over the next three years is to increase in size, capacity, and integration so that not only are "missing partners" such as educational institutions at the table, but that residents themselves are eager, able, and willing to gather and analyze data for strategic purposes. We would like to see broad institutional support for our work so it is perceived as valuable and integral to the various entities represented around the table. We would like to see a willingness to share the workload and expenses involved. Moreover, we would like to see an increase in our capacity to share, deliver, and broadly disseminate reports and data.

LOCAL LEARNING PARTNERSHIP PROFILE

SEATTLE

LLP Coordinator: Anne Gienapp

Annie E. Casey Foundation Evaluation Liaison: Tom Kelly

Contact Information
Anne Gienapp and Jane Reisman
Organizational Research Services
1932 First Avenue, Suite 408, Seattle, WA 98101
206-728-0474 phone
206-728-8984 fax
agienapp@organizationalresearch.com
janer1231@aol.com

History of Seattle's Local Learning Partnership

How they got started:
The Seattle LLP started with Annie E. Casey scouting for potential
partners, and contracting for specific separate pieces of work. In May 2000
a local consultant was engaged to begin coordinating those efforts and
strengthening the LLP. At the same time, the Foundation's evaluation liaison
decided to contract with Public Health – Seattle and King County to assist
with data gathering and interpretation. Our firm, Organizational Research
Services, came on to coordinate the LLP in December 2001.

Existing infrastructure that LLP was able to build on:
When ORS became involved, there was much to build on in terms of data
about the needs and priorities of the neighborhood (White Center), some
baseline data regarding current conditions, and ongoing data collection
efforts. In the early days of the LLP, there was little specific data about the
neighborhood of focus, nor was there an organization in the community
with an LLP-type mission or role. There were sources of information in
many places, but no hub or place that would naturally bring together data
on the neighborhood involved.

Current Focus of Work

We currently have several key activities:

1. To develop LLP engagement and roles among youth and community residents

2. To create a local evaluation plan which complements the larger *Making Connections* evaluation processes and provides more specific and relevant data on key community indicators for community members

3. To support the collection and use of data that the community has identified as necessary and important

4. To ensure awareness and relevance of LLP activities among those involved in providing services and program activities in the White Center neighborhood

Accomplishments

» Establishing relationships with local site coordinator and other key partners. We entered the Seattle-King County *Making Connections* picture at a time when there was quite a bit of tension and confusion among various individuals and partners. While this presented some challenges, we feel that we have gotten off to a very strong start. We have developed solid relationships with key partners, including the local Health Department, the local site staff, Annie E. Casey staff and other key local partners.

» Created a preliminary "thinking framework" to document current *Making Connections* investments and activities. Confusion about roles had led to some segmentation of activities. We hoped to bring together activities in a framework that connected all "on the ground" work to the core *Making Connections* principles/outcomes.

» Brought together 20 community-based researchers in February 2002. The community data efforts have in the past been segmented and happening "in silos." We viewed it as useful to bring community researchers together to share information about what data is available. A follow-up meeting was planned.

» Participation in the creation of a Results Framework. We worked closely with local site staff and Foundation staff to create a local results framework, identifying several sources of data to determine baseline conditions as well as ongoing measurement.

» Integrating LLP work with "Communities Count." Public Health Seattle King County, an LLP member, has completed a data collection initiative which gathered data on several indicators of social connection, economic well-being, and children's health. There was over-sampling done in White Center to provide neighborhood specific information for the *Making Connections* initiative.

» Our team assisted the local site coordinator by helping to develop or refine contract scopes of work for agencies receiving funds from Annie E. Casey Foundation's *Making Connections* effort. We were able to help connect scopes of work to the overall Results identified in the Results Framework noted above.

» Our team has conducted ongoing process documentation of various meetings, activities and events.

Challenges/Lessons Learned

» Catching up, as we have entered the process late. We are learning and developing relationships at the same time that we need to be developing products.

» Aligning data collection work across the site activities and LLP activities

Vision for the Future

Our hope is that the LLP is an active and dynamic group of people and organizations who are committed to collecting and/or using data for the purpose of benefiting the community in specific ways---namely, around the core principles of the *Making Connections* initiative. We also hope that the LLP is responsive and useful to the *Making Connections* partners and the White Center community.

APPENDIX B

LOCAL LEARNING PARTNERSHIP COORDINATORS
CONTACT INFORMATION AS OF SEPTEMBER 20, 2002

Boston

Charlotte Kahn

The Boston Foundation

75 Arlington Street, 10th Floor

Boston, MA 02116

617-338-2680 phone

617-338-1606 fax

cbk@tbf.org

Denver

Terri Bailey

The Piton Foundation

370 17th Street, Suite 5300

Denver, CO 80202

303-825-6246 phone

303-628-3839 fax

tbailey@piton.org

Des Moines

Tim Shanahan

Human Service Planning Alliance,

United Way Des Moines

1111 Ninth Street, #100

Des Moines, IA 50314

515-246-6605 phone

515-246-6546 fax

tshanahan.hspa@unitedwaydm.org

Hartford

Victoria J. Dougherty

Connecticut Policy and Economic Council

179 Allyn Street, Suite 308

Hartford, CT 06103-1421

860-722-2491 ext. 21 phone

860-548-7363 fax

dougherty@cpec.org

Indianapolis

Diane Pfeiffer

Consultant working on behalf of United Way of

Central Indiana

10132 Northwind Drive

Indianapolis, IN 46256

317-841-3103 phone

317-915-9824 fax

pfeifferdi@aol.com

Louisville

Jonathan Lowe

Community Resource Network

334 East Broadway, Suite 315

PO Box 406738 Louisville, KY 40204

502-589-6211 ext. 24 phone

502-584-3836 fax

JonathanL@crnky.org

Milwaukee

Sharon Adams

Nonprofit Center of Milwaukee

2819 W. Highland Blvd.

Milwaukee, WI 53208

414-344-3933 phone

414-344-7071 fax

sharonfadams@earthlink.net

Oakland

Junious Williams (contact: Matt Beyers)

Urban Strategies Council

672 13th Street

Oakland, CA 94612

510-893-2404 phone

510-893-6657 fax

mattb@urbanstrategies.org

Providence

Shelly Weeden
The Providence Plan
56 Pine Street, Suite 3B
Providence, RI 02903
401-455-8880 phone
401-331-6840 fax
sweeden@provplan.org

San Antonio

Ray Garza
Hispanic Research Center,
University of Texas, San Antonio
501 W. Durango Blvd.
San Antonio, TX 78207
210-458-2976 phone
210-458-2655 fax
rgarza@utsa.edu

Seattle

Anne Gienapp
Jane Reisman
Organizational Research Services
1932 First Avenue, Suite 408
Seattle, WA 98101
206-728-0474 phone
206-728-8984 fax
agienapp@organizationalresearch.com
janer1231@aol.com

APPENDIX C

RESOURCES FOR SELECTED TOPICS

The Library staff at the Annie E. Casey Foundation provided many of the citations listed below.

Community-Based Research/Participatory Action Research

Altpeter, et al. "Participatory Research as Social Work Practice: When Is It Viable," *Journal of Progressive Human Services*, Vol. 10, No. 2, pp. 31 – 53, 1999: http://www.haworthpressinc.com

Alvarez, Ann, and Loraine Gutierrez. "Choosing to Do Participatory Research: An Example of Issues of Fit to Consider," *Journal of Community Practice*, Vol 9, No.1, 2001: http://www.haworthpressinc.com

Bruner C, and V. Kot. Resident Experts: *Supporting the Neighborhood Organization and Individuals in Collecting and Using Information*. Des Moines, IA: Child and Family Policy Center, 1999.

Bryant, Thelma Truedell. "Together by Choice: Black Girls Creating Opportunities to Empower Themselves Through Participatory Action Research," *Dissertation Abstracts International Section A: Humanities & Social Sciences*, Vol. 61(4-A), October 2000.

Brydon-Miller, Mary. "Participatory Action Research: Psychology and Social Change," *The Journal of Social Issues*, Vol. 53, No. 4, pp. 657-666, Winter 1997.

Center for Collaborative Strategies in Health
http://www.cacsh.org

Center for Urban Research and Learning at Loyola University Chicago
http://www.luc.edu/curl/

The Community Research Network
http://www.loka.org/crn/index.htm

Dymond, Stacy K. "A Participatory Action Research Approach to Evaluating Inclusive School Programs," *Focus on Autism & Other Developmental Disabilities*, Vol. 16 (1), pp. 54-63, Spring 2001.

Gatenby, Bev, and Maria Humphries. "Feminist Participatory Action Research: Methodological and Ethical Issues," *Women's Studies International Forum*, Vol. 23, No. 1, pp. 89 – 105, January 2001: http://www.elsevier.com

Giesbrecht, Norman, and Judith Rankin. "Reducing Alcohol Problems Through Community Action Research Projects: Contexts, Strategies, Implications, and Challenges," *Substance Use & Misuse* Special Issue: Community Action and Prevention of Alcohol-Related Problems at the Local Level, Vol. 35(102), pp. 31-53, January 2000.

Hicks, Steven. "Participatory Research: An Approach for Structural Social Work," *Journal of Progressive Human Services*, Vol. 8, No. 2, pp. 63-78, 1997: http://www.haworthpressinc.com

The Institute for Community Research http://www.incommunityresearch.org

The Living Knowledge Database
http://www.livingknowledge.org/

The Loka Institute
http://www.loka.org

Matysik, Gregory J. "Involving Adolescents in Participatory Research," *Community Youth Development Journal*, Vol. 1, No. 4, Fall 2000.

McWilliam, Carol L. "Using a Participatory Research Process to Make a Difference in Policy on Aging," *Canadian Public Policy*, Vol. 23, No. 0, pp. 70-89, Spring 1997.

Minkler, Meredith. *Community Organizing & Community Building for Health*. New Brunswick, NJ: Rutgers University Press, 1997.

Minkler, Meredith. "Using Participatory Action Research to Build Healthy Communities," *Public Health Reports*, Vol. 115, No. 2/3, pp. 191-197, 2000.

Murphy, Danny, Madeleine Scammell, and Richard Sclove (Eds.). *Doing Community-Based Research: A Reader*. Washington, DC: The Loka Institute, August 1997.

Participatory Action Research site
http://www.scu.edu.au/schools/gcm/ar/arhome.html

Power, Robert. "Participatory Research Amongst Marginal Groups: Drug Users, Homeless People and Gay Men," *Drugs: Education, Prevention & Policy*, Vol. 9(2), pp. 125-131, May 2002.

Reisch, Michael, and Felix Rivera. "Ethical and Racial Conflicts in Urban-Based Action Research," *Journal of Community Practice*, Vol. 6, No. 2, pp. 49-62, 1999: http://www.haworthpressinc.com

Residents Engaged in Strengthening Families and Neighborhoods. Baltimore, MD: Technical Assistance/Resource Center of The Annie E. Casey Foundation, 2001.

Schwab, Michael. "Sharing Power: Participatory Public Health Research with California Teens," *Social Justice*, Vol. 24:11-32, Fall 1997.

Seattle Partners for Healthy Communities
http://depts.washington.edu/hprc/SeattlePartners/

Stevens, Karen A., and Ruth Folchman. "Using Participatory Action Research to Evaluate Programs Serving People with Severe Disabilities: Reflections from the Field," *The Journal of the Association for Persons with Severe Handicaps*, Vol. 23, No. 3, pp. 203-210, Fall 1998.

Stringer, E. *Action Research*. Sage Publications, 1999.

Trunbull, Ann P., Barbara J. Friesen, and Carmen Ramirez. "Participatory Action Research as a Model for Conducting Family Research," *The Journal of the Association for Persons with Severe Handicaps*, Vol. 23, No. 3, pp. 178-88, Fall 1998.

The University of Colorado site on Action Research
http://carbon.cudenver.edu/~mryder/itc/act_res.html

Comprehensive Community Initiatives

Aspen Institute Roundtable on Comprehensive Community Initiatives,
http://www.aspenroundtable.org

Stone, Rebecca (Ed.). *Core Issues in Comprehensive Community Building Initiatives*. Chicago, IL: Chapin Hall Center for Children at the University of Chicago, 1996.

Data Warehouses

Data Warehouses: Examples of Eleven Projects in Ten Cities, excerpted from a resource guide produced by the Harvard Family Research Project. Author and date unknown; provided by Tom Kelly of the Annie E. Casey Foundation.

Kingsley, Thomas. *Neighborhood Indicators: Taking Advantage of the New Potential*. Washington, DC: National Neighborhood Indicators Partnership, The Urban Institute, 1998.

Mapping Your Community: Using Geographic Information to Strengthen Community Initiatives. U.S. Department of Housing and Urban Development, 1997.

National Neighborhood Indicators Partnership
http://www.urban.org/nnip/

Stories: Using Information in Community Building and Local Policy, Expanded Edition. Washington, DC: National Neighborhood Indicators Partnership, The Urban Institute, July 1999.

Examples of Useful Data Warehouse Web Sites

Annie E. Casey Foundation KIDSCOUNT
http://www.aecf.org/kidscount/

The Boston Foundation
http://www.tbf.org/CenterMedia/viewer.htm

Jacksonville, Florida Quality of Life Indicators
http://www.jcci.org/qol/qol.htm

King County Communities Count Community Indicators
http://www.communitiescount.org

Oregon Community Profiles
http://159.121.111.9/profile.htm

The Piton Foundation
http://www.piton.org

San Diego Quality of Life
http://www.qolsandiego.net/

Evaluation

Baum, Howell S. "How Should We Evaluate Community Initiatives?" *Journal of the American Planning Association*, Vol. 67, No. 2, pp. 147-58, 2001.

Basic Guide to Evaluation. Management Assistance Program for Nonprofits: http://www.mapnp.org/library/evaluatn/fnl_eval.htm

Building an Evaluation Framework for Making Connections: Report of a Conference for Local Learning Partnerships; Will Fay for the Annie E. Casey Foundation; 2002.

Committing to Results & Celebrating Progress: Making Connections' Transition to Phase 2; Leila Fiester for The Annie E. Casey Foundation; June 2002.

The Evaluation Exchange. Harvard Family Research Project, Harvard Graduate School of Education: http://www.gse.harvard.edu/hfrp/eval.html

Fetterman, David M., Shakeh J Kaftarian, and Abraham Wandersman, (Eds.). *Empowerment Evaluation: Knowledge and Tools for Self Assessment and Accountability.* Thousand Oaks, CA: Sage Publications, 1996.

Harvard Family Research Project, Harvard Graduate School of Education www.hfrp.org

Preskill, H., and R. T. Torres. *Evaluative Inquiry for Learning in Organizations.* Thousand Oaks, CA: Sage Publications.

United Way Outcome Measurement Resource Network
http://national.unitedway.org/outcomes/

University of Kansas Community Toolbox
http://ctb.lsi.ukans.edu

Learning Community

Argyris, Chris. *On Organizational Learning.* Malden, MA: Blackwell Business, 1999.

Local Learning Partnerships – General

Questions & Answers about Local Learning Partnerships Learned by Evaluation Liaisons during Phase I; Leila Fiester for the Annie Casey Foundation; DRAFT: June 13, 2002.

Using Data to Promote Family Strengthening: Report of a Conference for Local Learning Partnerships in Making Connections Sites. Baltimore, MD: The Annie E. Casey Foundation, 2002.

Process Documentation

Basic Expectations for Cross-Site Process Documentation, DRAFT. Baltimore, MD: Annie E. Casey Foundation, August 14, 2002.

Building an Evaluation Framework for Making Connections: Report of a Conference of Local Learning Partnerships; Will Fay for The Annie E. Casey Foundation, 2002

Making Connections Phase 2 Learning Network: Summary of the June 10, 2002 Meeting; Leila Fiester for the Annie E. Casey Foundation.

Qualitative Data

Chrisman, N.J., K. Senturia, G. Tang, B. Gheisar. "Qualitative Process Evaluation of Urban Community Work: A Preliminary View," *Health Education and Behavior*, Vol. 29(2):232-248, 2002.

Iverson, Roberta Rehner. *Moving Up is a Steep Climb: Parents' Work and Children's Welfare in the Annie E. Casey Foundation's Jobs Initiative*. Baltimore, MD: Annie E. Casey Foundation, April 2002: http://www.aecf.org/jobsinitiative/ethnography.htm

LeCompte, Margaret D., and Jean J. Schensul. *Designing & Conducting Ethnographic Research: (1) Ethnographer's Toolkit.* Walnut Creek, CA: Sage Publications, 1999.

LeCompte, M.D., W.L. Milroy, and J. Preissle. *Handbook on Qualitative Research Methods in Education.* Academic Press, 1992.

Nova Southeastern University: Qualitative Research Websites
http://www.nova.edu/ssss/QR/web.html

Race, Ethnicity, Culture, Class, Gender and Power

Bryant, Thelma Truedell. "Together by Choice: Black Girls Creating Opportunities to Empower Themselves Through Participatory Action Research," *Dissertation Abstracts International Section A: Humanities & Social Sciences*, Vol. 61(4-A), October 2000.

Gatenby, Bev, and Maria Humphries. "Feminist Participatory Action Research: Methodological and Ethical Issues," *Women's Studies International Forum*, Vol. 23, No. 1, pp. 89 – 105, January 2001: http://www.elsevier.com

Giachello, Aida L. *Issues and Challenges in Building Partnerships Between Academic Institutions and Community-Based Organizations*. University of Illinois at Chicago. Presentation at 2001 Annie E. Casey Local Learning Partnership conference.

Power, Robert. "Participatory Research Amongst Marginal Groups: Drug Users, Homeless People and Gay Men," *Drugs: Education, Prevention & Policy*, Vol. 9(2); pp. 125-131, May 2002.

Reisch, Michael, and Felix Rivera. "Ethical and Racial Conflicts in Urban-Based Action Research," *Journal of Community Practice*, Vol. 6, No. 2, pp. 49-62, 1999: http://www.haworthpressinc.com

Singh, Nirbhay N. *Researcher versus Resident: Issues of Race, Class, Culture and Power in Evaluation.* Virginia Commonwealth University. Presentation at 2001 Annie E. Casey Local Learning Partnership conference.

Stevens, Karen A., and Ruth Folchman. "Using Participatory Action Research to Evaluate Programs Serving People with Severe Disabilities: Reflections from the Field," *The Journal of the Association for Persons with Severe Handicaps*, Vol. 23, No. 3, pp. 203-210, Fall 1998.

Sullivan et. al. "Researcher and Researched –Community Perspectives: Toward Bridging the Gap," *Health Education and Behavior*, Vol. 28(2), pp. 130-149, April 2001.

Resident Engagement/Involvement

Bailey, Terri J. *Building Community Capacity to Use Information: A Framework.* Washington, DC: National Neighborhood Indicators Project, The Urban Institute, October 1997.

Jayapal, Pramila. *The Seattle/King County Making Connections Study Circles: A Report on the Vision, Process, and Learnings of Two Study Circles.* Seattle, WA: Annie E. Casey Foundation, January 2001.

Nyden, Philip, Anne Figert, Mark Shibley, and Darryl Burrows. *Building Community: Social Science in Action.* Thousand Oaks, CA: Pine Forge Press, 1997.

Residents Engaged in Strengthening Families and Neighborhoods. Baltimore, MD: Technical Assistance/Resource Center of The Annie E. Casey Foundation, 2001.

Rozansky, Phyllis. *Family Circles: Sharing Our Experiences.* Baltimore, MD: Annie E. Casey Foundation.

Traynor, Bill. *Reflections on Community Organizing and Resident Engagement in Rebuilding Communities.* Baltimore, MD: Annie E. Casey Foundation, November 2000.

Working with Members: Building Capacity for Local Decisionmaking (Number 2 in a series of Learning Guides). The Center for the Study of Social Policy and partners, June 2001.

Youth Asset Mapping. The Academy for Educational Development at the Center for Youth Development & Policy Research: http://cyd.aed.org/cym/tensteps.html

Strategic Use of Information

Lyons, Thomas S., and Roger E. Hamlin. New York, NY: Praeger, 1991. *Creating an Economic Development Action Plan: A Guide for Development Professionals.*

"Making a Difference with Data," *Insites.* Baltimore, MD: Annie E. Casey Foundation, Spring 2001.

McWilliam, Carol L. "Using a Participatory Research Process to Make a Difference in Policy on Aging," *Canadian Public Policy*, Vol. 23, No. 0, pp. 70-89, Spring 1997.

Using Strategic Communication to Support Families. Annie E. Casey Baltimore, MD: Technical Assistance/Resource Center of The Annie E. Casey Foundation.

Weisbrod, Burton A., and James C. Worthy, (Eds). *The Urban Crisis: Linking Research to Action.* Evanston, IL: Northwestern University Press, 1997.

INDEX

INDEX

Index

INDEX

The Annie E. Casey Foundation