

Evaluation for Equity

Measuring What Matters in
Parent Leadership Initiatives



PARENT LEADERSHIP
INDICATORS PROJECT

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Introduction

On an early November evening in Providence, Rhode Island, a group of nearly twenty parent staff, evaluators, researchers, and funders associated with parent leadership initiatives (PLIs) stood on a “human spectrum.” Individuals placed themselves somewhere on the spectrum in between “loving evaluation” and “hating evaluation.” Many more stood closer to the side of “hating evaluation” than “loving it.” Several comments summarized how they explained their choice:

“There’s never an understanding of how long it takes to create change. There’s an expectation that results will be instant.”

“Parents never seem to have a say about what outcomes are evaluated. Instead, we’re asked to measure outcomes such as student test scores, which is not the purpose of our program.”

“Outcomes are always measured through numbers. What about documenting in detail what is truly happening in the program? What about parents’ voices?”

“Evaluation seems to always be about whether a program worked or didn’t work, not about how we may use the data to improve.”

In recent years, there has been an increased emphasis on “evidence-based programs,” leading to numerous databases that schools and communities can search to find programs that have demonstrably improved individual outcomes (e.g., [Blueprints](#), [What Works Clearinghouse](#), [SAMHSA’s National Registry of Evidence-Based](#)

[Programs and Practices](#)). Although such databases are efficient for busy people trying to make decisions about what programs have a high chance of succeeding, PLIs – and many other types of community-based work – do not easily lend themselves to this type of vetting. Parent leadership initiatives require a different evaluation paradigm – one that aligns with the participatory and empowering goals of PLIs and that reflects how individuals, communities, and systems are slowly transformed over time through the hard work of building trusting relationships.

The Parent Leadership Indicators Project is creating a novel and comprehensive evaluation tool for parent leadership training and organizing initiatives that builds on a [parent leadership theory of change](#), developed in collaboration with experts in the field and with parent leaders and staff of PLIs. This theory of change illustrates parents’ pathways from being relegated to the political margins to being valued by public officials and influencing policy and practice changes in ways that lead to more equitable opportunities for children (Henderson & Gill Kressley 2016).¹

The purpose of this paper is to help evaluators, funders, and practitioners consider approaches to evaluating PLIs that address the concerns about evaluation we heard from many of our project’s advisory board members, as well as other parent leaders and PLI staff around the country. We begin with an overview of the practice of evaluation, including the range of potential purposes and choice of evaluator, along with principles for strong evaluation. Next, we discuss what we

have learned so far about evaluating PLIs in particular. Finally, we offer recommendations for funders, evaluators, and practitioners.

What Is Evaluation?

Evaluation is a type of inquiry about an organization, program, initiative, or set of practices. In this section, we will discuss some of the questions to ask when organizations consider what approach to use.

What is the purpose of the evaluation?

Different stakeholders use evaluation for different, and sometimes multiple, purposes. Funders, for example, are often interested in evidence that a program is effecting change, whereas program participants or staff might engage in evaluation to improve their

¹ The Parent Leadership Indicators Project was begun at the Annenberg Institute for School Reform at Brown University (AISR), where research and policy staff worked with consultants Anne Henderson and Kate Gill Kressley (2016) to create the framework *Capturing the Ripple Effect: Developing a Theory of Change for Evaluating Parent Leadership Initiatives*. On September 1, 2017, the AISR research and policy team and the PLI Project transitioned to the Metro Center at New York University, where the project continues.

practices and strategies. Steve Patty (2013) writes that evaluations generally address two broad purposes.

The first is to **prove**, or:

to see if we are accomplishing what we set out to accomplish with people or situations – if we are, in other words, effecting change.

The second is to **improve**, or:

to get better at a set of interrelated factors – problems, strategies, policies, approaches, contexts, puzzles, dispositions – in service of the mission of our work.

To these two, we would add a third, to build knowledge for the field. Evaluations often have implications far beyond the specific site or program being evaluated.

WHAT DISTINGUISHES EVALUATION FROM OTHER KINDS OF RESEARCH?

The term research refers to various forms of inquiry, one of which is evaluation. One way of distinguishing evaluation from other kinds of research is that most research generalizes, or seeks to extrapolate findings to apply to a whole set of people or practices, while evaluation particularizes – that is, it is focused on understanding a specific organization or initiative (see, for example, Smith & Brandon, eds., 2008). Evaluation and other forms of research draw on the same methods, and evaluations undertaken for the purposes of a single PLI can add to the larger evidence base for parent leadership and contribute new knowledge to the field.

For an evaluation of a PLI, typical goals might be:

IMPROVE

- Help the staff and stakeholders of the initiative identify areas for growth and improvement and make strategic decisions
- Examine the relationships between specific program features or activities and specific outcomes of interest

PROVE

- Demonstrate the outcomes and impact of the initiative to current and potential funders
- Demonstrate the outcomes of the initiative to public officials and policy-makers

BUILD KNOWLEDGE

- Document the features, processes, and outcomes of the initiative to identify successful practices for others in the field to use
- Compare the features or outcomes of several initiatives

At what stage of program activities is the evaluation taking place?

The evaluation field traditionally classifies evaluations as formative, process, or summative, depending on when the evaluation is carried out and what its main purposes are:

- **Formative** evaluation assesses the feasibility of a program or initiative when it's being developed or modified, and/or provides rapid feedback on program design that can be used to make adjustments as a program is being developed. This type of evaluation is particularly critical for newer programs. The main goal of forma-

tive evaluations is to **improve** the design or implementation of an initiative.

- **Process** evaluation examines whether program activities have been implemented as planned (“with fidelity”) and can help establish links between activities and outcomes. Process evaluations can have goals related to both **improving** an initiative and **proving** that (and how) an initiative produces outcomes.
- **Summative** evaluation assesses the outcomes and impacts of a program. (In the case of a PLI, outcomes might be specific leadership skills gained in the short term, and impacts might include policies changed by parent leaders engaged in collective action in the longer term.) Summative evaluation is what often comes to mind in discussions of evaluation, and generally seeks to **prove** that an initiative has particular outcomes or impacts. Funders, policy-makers, and academics are often interested in summative evaluation to assess whether an initiative has accomplished its goals.

In practice, the lines between formative, process, and summative evaluation approaches are not cleanly drawn. Effective evaluations often collect data from different phases of program implementation and combine elements of formative, process, and summative approaches. To inform program improvement and strategy, and to provide useful lessons for similar initiatives (that is, to build knowledge), it's important to be able to connect outcomes and impacts to program features and to process data on how an initiative has been implemented on the ground.

Who conducts the evaluation?

The choice of evaluator is an important part of planning for an evaluation. Some of the options are: external professional evaluators, internal initiative staff, or, increasingly, an approach that includes a range of program stakeholders in the evaluation. Each of these choices has advantages and disadvantages, described in this section and summarized in Figure 1 on the next page.

EXTERNAL EVALUATORS

Conventional program evaluation is often conducted by professional evaluators, usually hired by programs/initiatives or by funders. The evaluator(s) consult with program staff, funders, and sometimes participants to clarify the scope and goals of the evaluation and to design appropriate methods and data collection schemes, but are responsible for collecting and analyzing data and developing findings. Traditionally, external evaluators have been viewed as impartial and better positioned to report objectively on the strengths and weaknesses of programs and the extent to which they achieve their goals. Professional evaluators can also employ sophisticated data collection and analysis methods that fall outside the capacity of most program stakeholders. External evaluators often situate their work within the larger base of research relevant to a particular field and design their evaluations in order to compare program outcomes and impacts to the outcomes of other programs or models or to address larger questions of interest to the field (Partnership for the Public Health 2002).

INTERNAL EVALUATORS

Program evaluation is also sometimes conducted by internal evaluators – that is, initiative staff who act as evaluators as either a portion or the entirety of their job. Internal evaluation can be less costly than hiring an external evaluator, and internal evaluators usually have a rich understanding of an initiative's context and practices, a good grasp on key evaluation questions, and easy access to data. Internal evaluators often have less access to specialized knowledge about evaluation methods and techniques than professional evaluators. Internal evaluations are sometimes seen by funders and other stakeholders as less credible than external evaluations, given that the evaluator has a stake in the initiative being viewed positively and may be less willing to share negative findings – and participants may be less likely to share their own criticisms with an internal evaluator (Conley-Tyler 2005).

PARTICIPATORY EVALUATION

Over the last several decades, increasing numbers of evaluators, practitioners, and funders have advocated for a different approach to evaluation that involves program stakeholders intimately in the work of evaluation. Participatory evaluation is a collaborative approach to evaluation in which stakeholders of a program or initiative (staff, leaders, participants, and funders) work together with professional evaluators to identify the goals of the evaluation, develop evaluation questions and appropriate methods, collect data, analyze and make sense of the data, and make decisions about what to celebrate and what to change (Zukoski & Luluquisen 2002; Baker & Bruner 2010; University of Kansas 2016).

There are many models and approaches for carrying out participatory evaluation, with a range of roles for stakeholders and external evaluators. At the less participatory end of the spectrum, stakeholders may be intensively engaged mainly at the beginning stages, helping to elaborate a theory of change and identify potential indicators, while the selection of methods, data collection and analysis is carried out by the external evaluator(s). In more deeply participatory models, stakeholders may receive training in evaluation techniques and carry out evaluation activities without the active involvement of external evaluators. A middle ground might be external evaluators acting as coaches or facilitators, sharing responsibility with participants for decisions about evaluation design and providing training and guidance as stakeholders collect and analyze data. The choice of approach depends on the interest and capacity of stakeholders and the goals of the evaluation.

Advocates of participatory evaluation point to a number of advantages. Participatory approaches require deliberate collaboration and the active consideration of the perspectives of other stakeholders as stakeholders analyze and draw conclusions from the data (Baker & Bruner 2010). Because implementers and beneficiaries are intimately involved in identifying evaluation questions, those questions are more likely to address issues of immediate concern and relevance to those closest to a program. This relevance means that findings are more likely to be used to refine program practices and strategy. Participatory evaluation builds

FIGURE 1.
Advantages and disadvantages of choice of evaluators

	ADVANTAGES	DISADVANTAGES
<p>INTERNAL EVALUATION</p> <p>Initiative staff act as evaluators as either a portion or the entirety of their job.</p>	Can be less costly than an external evaluator	Often have less access to specialized knowledge about evaluation methods and techniques than professional evaluators
	Usually have a rich understanding of the initiative’s context, practices, and potential key evaluation questions; easy access to data	Sometimes seen by funders and other stakeholders as less credible than external evaluations due to having a stake in a positive view and possible greater reluctance of participants to share criticism
<p>EXTERNAL EVALUATION</p> <p>Conducted by professional evaluators, usually hired by programs/initiatives or by funders</p>	Traditionally viewed as impartial and better positioned to report objectively on program strengths and weaknesses and to what extent goals are achieved	Do not always have a nuanced understanding of the cultural, social, and political context that would lead to more-relevant evaluation questions and increase the chances of findings being useful to the program and community
	Can employ sophisticated data collection and analysis methods that fall outside the capacity of most program stakeholders	Power differentials, especially with participants from marginalized communities, can impede open and honest dialogue, leading to misleading or incomplete data
	<p>Evaluation is often situated within the larger base of relevant research</p> <ul style="list-style-type: none"> • Can compare program outcomes and impacts to other programs or models • Can address larger questions of interest to the field 	
<p>PARTICIPATORY APPROACHES</p> <p>Staff and leaders play central roles in designing and carrying out evaluation, with or without the help of a professional evaluator.</p>	<p>Can strengthen evaluation design and increase impact by requiring deliberate collaboration with other stakeholders</p> <ul style="list-style-type: none"> • Capitalizes on participants’ nuanced understanding of cultural, social, and political context, often inaccessible to external evaluators • Evaluation questions more likely to address most urgent and relevant issues • Findings more likely to be used to refine program practices and strategy 	<p>Requires major investment of time and attention by program staff, participants, and other stakeholders</p> <ul style="list-style-type: none"> • Can be a burden for organizations with small staff and limited budgets, and for participants with many other obligations and pressures
	<p>Can produce better and more thorough data</p> <ul style="list-style-type: none"> • Capitalizes on bonds of trust, especially when collecting personal and sensitive data • Helps minimize potential reluctance, due to power differentials between evaluators and people providing the data, to engage in honest and open dialogue, especially in historically marginalized communities 	Requires strong trust, collaborative norms, and careful attention to assembling an evaluation team that represents multiple groups of stakeholders and attends to power dynamics
	Builds programs’ capacity to use data and embed evaluation in ongoing program practice	Funders who are accustomed to more conventional approaches may be skeptical about objectivity and rigor

programs' capacity to use data and embed evaluation in ongoing program practice.

Participatory designs can also strengthen the evaluation by capitalizing on participants' nuanced understanding of the cultural, social, and political context of the program or initiative – knowledge that is often inaccessible to external evaluators. Participatory approaches that involve program staff and participants in data collection often allow the collection of better and more thorough data, particularly data of a personal or sensitive nature, by capitalizing on (and enhancing) bonds of trust that exist within an initiative. This trust is particularly crucial for initiatives that involve communities that have been historically marginalized, where power dynamics between professional evaluators and the people providing evaluation data might interfere with honest and open dialogue (Zukoski & Luluquisen 2002).

Participatory evaluation does have disadvantages, the most salient being that it requires a major investment of time and attention on the part of program staff, participants, and other stakeholders – particularly for the more intensely participatory models. For organizations with small staffs and limited budgets, and for participants who may have many other obligations and pressures, developing evaluation skills and carrying out an evaluation can be a heavy lift. It also requires strong trust and strong collaborative norms and careful attention to assembling an evaluation team that represents multiple groups of stakeholders and attends to power dynamics

(Zukoski & Luluquisen, 2002). Finally, while many funders – especially those who fund social change and grassroots initiatives – appreciate the importance of participatory evaluation, those who are more familiar with conventional approaches may be skeptical of the objectivity and rigor of participatory models.

Principles for Strong Evaluations

Through a review of the literature on designing and implementing evaluations, as well as literature on how evaluation findings are used, and our own experiences as evaluators, we have identified some evaluation principles that hold true regardless of who is conducting the evaluation and the specific approaches they choose. These principles help ensure that evaluations reflect an accurate and nuanced view of what is occurring in an initiative and that the findings provide direction for improvement and refinement.

- Begin from a clear purpose and have specific audiences in mind. Although many evaluations are formative, process, and summative all at once, identifying the primary purpose will help to define the evaluation questions, approaches, methods, and sources of data.
- Employ a logic model or theory of change that connects processes and features of the setting to outcomes and impacts. A basic working theory explaining why an initiative's activities and features could be expected to lead to the particular outcomes or changes it hopes to produce is essential. The theory of change should

articulate incremental markers of progress that can be plausibly linked to longer-term outcomes and impacts (Reisman, et al., 2007; W. K. Kellogg Foundation, 2006). Of course, this theory will likely be revised as the initiative's strategy changes or more is learned about how the initiative is working.

- Be realistic about appropriate timeframes for observing outcomes. For example, it would be plausible to expect outcomes related to civic climate and democracy for a PLI that has graduated multiple cohorts and grown a sizeable network of alumni. It would not be realistic to examine changes in civic climate and democracy indicators for a newly established initiative.
- Attend to cultural, social, and political context and use culturally appropriate data collection methods. All evaluation questions, frameworks, methods, and measures reflect values and assumptions. Many commonly used evaluation techniques were developed in dominant cultures and reflect the values and assumptions of dominant cultures. When evaluators or evaluations consciously or unconsciously employ assumptions that do not match those of the initiative being evaluated or its participants – or when evaluators don't acknowledge implicit biases rooted in race, class, or language – it is easy to misinterpret findings, overlook important themes, and draw flawed conclusions. In the case of PLIs, it's important to attend to different understandings of leadership and of how people should work together. Different cultural values and

practices can also have implications for decisions about how, and from whom, to collect data.

- Where possible, collect data at multiple time points. Given that initiatives seek to produce change, designs that collect data over time, or about multiple points in time, will provide the best evidence of effectiveness.
- Use multiple methods of data collection and analysis, including both quantitative and qualitative methods. Different questions are best suited to different types of data. Quantitative data are useful for understanding size, scope, and trends over time. Qualitative data are useful for reflecting how participants make sense of their own experiences in an initiative and for assessing relationships, strategies for collective action, and impacts on policy or practice. In mixed methods evaluations, qualitative and quantitative data are used together to provide a broad and deep understanding of outcomes and impacts (Ponterotto, et al., 2013).
- Collect data from multiple sources and multiple informants and triangulate, or cross-check, findings and themes across methods and data sources. Using multiple data sources enhances confidence in the conclusions drawn from an evaluation. Consistent themes across interviews and surveys with parent leaders, initiative staff, and public officials, for example, would support credible conclusions about an initiative. Differences in findings across multiple methods or multiple stakeholders can also highlight challenges or point to differing outcomes for various groups of parents that are worth further exploration.

- Be realistic about capacity. Evaluation takes time, money, and skill. A small, narrowly focused evaluation that is thoughtful about research questions, methods, and who participates is more likely to yield useful findings than a broad evaluation that generates mountains of data or is abandoned midway. A small-but-successful foray into evaluation will build capacity and suggest new questions for more ambitious rounds of evaluation in the future.

Evaluating Parent Leadership Initiatives

What we heard from PLI staff and leaders

Through listening sessions, focus groups, and meetings, our team has had multiple opportunities over the past several years to hear from PLI staff and parent leaders about how evaluation can be most relevant and useful to their initiatives. Those conversations surfaced a number of themes that have informed our thinking about evaluating parent leadership: parent leader voice; anti-racist principles; system- and community-level change; and capacity building.

WHOSE PRIORITIES?

PLI staff shared that their previous experiences with evaluation had prioritized outcomes defined by funders or evaluators, not parent leaders or initiative staff. They emphasized that evaluations must center parent leaders' priorities, questions, and needs in order

to be useful. While they recognize the value of collecting broader quantitative data, they believe parents' own stories must take precedence.

Our conversations surfaced the centrality of racial justice and anti-racism in the work of PLIs. PLIs emphasize cultural competence and relationship building across lines of race, class, language, and culture in their program models and in their hiring and recruitment practices. They work to challenge the deficit assumptions about families living in poverty and families of color that often shape institutional practices; build the power of those families to hold systems accountable for serving their children well; and ensure that diverse voices are well represented in formal and informal civic spaces. Evaluation of PLIs should employ anti-racist principles and approaches and should include research questions about how PLIs advance social and racial justice.

INDIVIDUAL AND COLLECTIVE IMPACTS

Past evaluations have focused mainly on how participating in PLIs impacts parent leaders themselves. While personal transformation is a crucial aspect of our theory of change, parent leaders and PLI staff shared their dissatisfaction with paradigms that treat leadership development and transformation as an individual process with individual outcomes; in their work, leadership and empowerment are built through relationships and the knowledge and skills that one parent leader develops influence everyone around

her. Past evaluations have not often rigorously assessed collective action, changes in policy and practice, or democratic capacity, nor have they examined the connections between personal transformation and community transformation. System- and community-level changes are built slowly and require longer evaluation timelines.

INVESTMENT AND CAPACITY BUILDING

Parent leaders and PLI staff emphasized the heavy lift – in terms of time, funding, staffing, and expert knowledge – required to do evaluation well. They discussed the need to build their own capacity to conduct and use evaluation and their desire to learn together with other PLIs about promising practices and evaluation strategies.

Our approach to evaluation for PLIs

Our goal is to develop tools and supports that will help make evaluation more feasible and relevant for PLIs, and to facilitate learning communities of PLIs, evaluators, and other stakeholders that will continue to advance knowledge and practice. We have tried to balance the priorities of parent leaders and other stakeholders and to be realistic about the time and capacity constraints facing PLIs.

We reviewed existing empirical and theoretical research on parent and family leadership, as well as two indicator frameworks (Gold, Simon & Peralta 2013; Reinelt, Foster & Sullivan 2002), to identify a set of indicators that provide starting points for thinking about potential outcomes of

parent leadership. These indicators are mapped onto the [theory of change](#) developed collaboratively with parent leaders in Phase I of this project. (We intend this theory of change to describe and connect potential outcomes of PLIs, recognizing that each initiative will have its own theory of change and that these theories shift over time.)

For each indicator, we have identified examples of evidence of the indicator – “what this may look like” – as well as appropriate evaluation methods and specific measures, where possible. Our goal is a flexible framework that provides starting points and tools but does not prescribe specific indicators, measures or methods. The framework will be available online, with links to additional resources and tools.

It is deeply important to us to develop a set of strategies and tools that center the experiences, needs, and priorities of parent leadership initiatives. In our framework and plans for capacity-building support, we have been guided by our engagement with PLIs and with our advisory board. At the same time, we recognize the reality that there are other important audiences for parent leadership evaluation, including funders and public officials. These stakeholders are often, though not always, most interested in outcomes – for example, impacts on parent leaders’ skills or changes in policy. They are often interested in data that help draw conclusions across initiatives, compare models, and place initiatives in the context of the research literature. PLIs

depend on private philanthropic funding for their continued existence, and on public officials and positional leaders for access and relationships, so they must attend to those stakeholders’ evaluation interests. To reflect what we’ve learned from PLIs, attend to capacity building, and meet the interests of other stakeholders, we use the following guidelines:

WE EMBRACE THEORY-BASED, DEVELOPMENTAL APPROACHES TO EVALUATION.

In complex initiatives, theories of change often shift in the face of emerging challenges or fail to anticipate important outcomes and challenges. Over the last decade, evaluators grappling with complex initiatives have elaborated a distinct type of evaluation – *developmental* evaluation (Gamble 2008). Developmental evaluation begins from the proposition that change is often non-linear and that initiatives that are at an early stage or design or that involve multiple stakeholders often move in directions not anticipated even by the best-designed logic models. Developmental approaches are designed to quickly and flexibly adjust alongside implementation and to “provide real-time feedback that subtly supports shifts in policies, practices, resource flow, and programming in a way that is sensitive to context” (Langlois, Blanchet-Cohen & Beer 2013, p. 40).

This flexibility and interplay between implementation and evaluation is especially crucial for evaluating community- and system-level outcomes. Work with public officials and positional leaders, collective action, and civic

engagement are unpredictable, require quick and frequent shifts in strategy, and depend on contextual factors beyond the control of an initiative. Progress is often non-linear and incremental, and a failure in one arena – for example, failing to change a policy – may be accompanied by growth in other areas, like parent leaders' engagement with an issue or the sophistication of their understanding of the political process.

Because PLIs seek to produce change at multiple levels, and because a complex mix of contextual factors shape outcomes, theory-based, developmental evaluation is an appropriate starting point. A flexible theory of change linking a PLI's activities and features to short- and long-term goals at multiple levels provides a framework for evaluation that will address process questions (**improving**; how, why, and under what conditions a strategy works) in addition to outcome questions (**proving** whether a strategy works). Developmental approaches build the capacity of PLIs to make use of evaluation data by facilitating conversations about data in real time, to inform decisions. We have incorporated methods drawn from developmental evaluation into the PLI indicator framework and encourage PLIs and evaluators to approach theories of change and expected outcomes flexibly as work unfolds.

WE PRIORITIZE PARTICIPATORY APPROACHES WHILE BUILDING ON WHAT'S ALREADY BEEN DONE.

Participatory approaches ensure that parent leaders and PLI staff are engaged in posing and refining evaluation questions, making decisions about what data to collect and in what form, and making sense of data. Participatory evaluation allows PLIs to define the outcomes that matter and to structure evaluations to support program improvement and strategic decision-making. As noted above, participatory evaluation is well suited to advancing racial justice, in that it centers the knowledge, analysis, and conclusions of constituencies who have often had little experience being listened to or regarded as experts. Participatory approaches align with the values of collaboration, democratic engagement, and empowerment that guide PLIs (Zukoski & Luluquisen 2002; Baker & Bruner 2010; University of Kansas 2016). Participatory approaches also help PLIs to build their own self-evaluation capacity and develop routines and structures for making use of data.

We hope that participatory evaluation of PLIs will facilitate the development and testing of new ways to measure and document processes and outcomes that reflect the experiences and needs of parent leaders and PLI staff. In our review of existing methods and measures, we noted particular gaps in evaluation of impacts on public officials, collective action, and civic climate. At the same time, we hope PLIs can use and adapt existing methods and measures rather than reinventing the wheel. Many published evaluations and much scholarly literature on parent leadership exist as resources for PLIs. Evaluations can also draw on other disciplines such

as psychology and sociology, as well as research and evaluation of related fields like community organizing and civic engagement. It's a common practice in research and evaluation to adopt measures that have been developed and tested by other researchers. Using existing measures saves the time and expense of drafting, piloting, and revising scales, and can enhance confidence that the scales are measuring what they intend to measure (i.e., they have validity) and that they work consistently (i.e., they have good reliability). Adopting widely used survey scales or other existing measures can also help put evaluation findings into a larger context and facilitate comparisons across initiatives.

Our indicator framework includes suggested methods and measures drawn from our review of the literature and previous evaluations. Unsurprisingly, we found many more validated measures (mostly survey measures) of personal transformation impacts than we did for indicators in other parts of the theoretical framework. We encourage PLIs and evaluators to carefully consider the fit between measures and the specific context, values, and needs of the PLI. Some measures may have been developed and tested with communities very different from those where PLIs work; other measures may come from research traditions or theoretical frameworks that don't value racial justice, empowerment, or other values central to PLIs (see Appendix A). We expect that some measures and methods will emerge as more useful than others, and we hope PLIs and their evaluators will also develop and share new methods and measures through their own evaluation work.

WE PRIORITIZE QUALITATIVE, NARRATIVE DATA COLLECTION METHODS WHILE BALANCING QUALITATIVE AND QUANTITATIVE APPROACHES.

Parent leaders and initiative staff expressed reservations about relying on numbers to reflect transformative changes that happen in the context of relationships. An over-reliance on quantitative measures also elevates programmatic and individual outcomes, which more easily lend themselves to quantitative measurement, over community and civic outcomes. Qualitative approaches can help advance the racial justice goals of PLIs, by centering the stories, reflections and analysis of parents of color and presenting counter-narratives to stereotypes and deficit-based assumptions (Delgado Bernal, Burciaga & Flores Carmona 2015; Solórzano & Yosso 2002.)

While prioritizing qualitative approaches, we can judiciously select quantitative methods that address specific questions and complement qualitative findings. As noted above, mixed methods approaches that draw evidence from multiple sources and multiple informants increase the rigor of evaluation findings. Quantitative methods are often less labor intensive than qualitative and facilitate the collection of data from a large number of people. Quantitative methods also lend themselves to measuring change over time, facilitate comparisons or aggregation across multiple cohorts or multiple initiatives, and allow insight into links between participants' experiences with the program (e.g. satisfaction, attendance) and program

outcomes. For example, PLIs quantitatively analyze change over time on survey measures of parent leaders' personal transformation, complemented by qualitative data collected through interviews, focus groups and observations. Additionally, tracking representation in civic decision-making bodies by race, gender, or class and counting the frequency of participation in civic behaviors can provide important quantitative evidence of changes in civic climate and democracy.

WE HELP PLIs BUILD THEIR EVALUATION CAPACITY AND MAKE EVALUATION MORE FEASIBLE.

PLIs operate with limited budgets and staff members who are already stretched thin. Parent leaders themselves volunteer their time. Evaluation – especially longitudinal, participatory, developmental evaluation that prioritizes qualitative data – is expensive and time consuming. PLIs need access to evaluators with relevant expertise, to the bodies of scholarly knowledge and existing evaluations that could inform their approaches, and to networks of their peers with whom they can reflect, learn, and problem-solve. They need the infrastructure to support regular data collection and analysis and investment in staff and leaders' capacity to engage in evaluation and act on findings. They need tools, strategies, and best practices to make evaluation feasible and sustainable to incorporate into their practice so that it serves to strengthen their reach and impact, rather than distract from their core work.

Building the evaluation capacity of PLIs will ensure that they are able to reflect thoughtfully on successes and challenges, hold themselves accountable to their values and goals, and support empowered and effective parent leaders. Deeper evaluation capacity and fluency also better positions PLIs to advocate for funders and officials to adopt the evaluation questions, approaches and metrics that the initiatives believe to best reflect their work. Real investment in evaluation capacity building and networks is crucial.

Recommendations

We close with recommendations for funders, evaluators/researchers, and practitioners. These recommendations are not exhaustive, and we expect that the list will evolve and grow over time. However, we are confident that the recommendations have been informed by members of each of the three groups and that enacting them will contribute to evaluations of PLIs that are both rigorous and just.

PLIs

- Reflect on past experiences with evaluation and how those experiences strengthened the initiative's work or fell short of being useful.
- Engage parent leaders and staff in conversations about goals, outcomes, and collecting and analyzing data.
- Advocate for the inclusion of qualitative/narrative data and appropriate timelines with funders.
- Take part in professional learning communities with peer initiatives, evaluators, and researchers.

Evaluators and researchers

- Work with PLIs to develop low-cost, simple methods for collecting programmatic data that support ongoing evaluation (including online and mobile phone-based applications).
- Continue identifying, compiling, and adapting measures, methods, and approaches that meet the needs and context of PLIs.
- Validate existing useful measures with diverse populations represented in PLIs, and interrogate the theoretical underpinnings and assumptions of widely used measures to ensure that they support the racial justice and empowerment goals of PLIs.
- Adapt methods and measures from community organizing, social movement, and democracy research and evaluation to reflect the context and needs of PLIs.
- Document the process, successes, and challenges of conducting evaluations in partnership with PLIs.
- Prioritize dissemination of evaluation findings – and descriptions of evaluation approaches – to practitioners and funders, in addition to academic audiences.
- Work with parent leaders and parent leadership practitioners to develop guides, trainings, and other supports to build the evaluation capacity of PLIs.

Funders

- Ensure that grantee reporting expectations reflect the goals and desired outcomes of PLIs and do not hold PLIs accountable for outcomes outside of their scope or theory of change.
- Ensure that grantee reporting expectations and funding for evaluation reflect social and racial justice values.
- Develop realistic evaluation timelines that recognize that progress is non-linear, unpredictable and dependent on context, and that goals and priorities shift even in established initiatives.
- Encourage and invest in participatory approaches.
- Learn about, and encourage other funders to learn about, narrative and qualitative research methods and emerging methods for evaluating collective action and civic/democratic change.
- Invest in PLI's capacity and infrastructure to design, conduct, and act on evaluation.
- Invest in professional learning networks of PLIs, evaluators, and researchers to share best practices, build capacity, and develop shared measures and data collection and analysis methods.

We anticipate that our indicator framework will support each of these groups with some of these recommendations (See Appendix A to learn more about the framework, timeline, and future activities).

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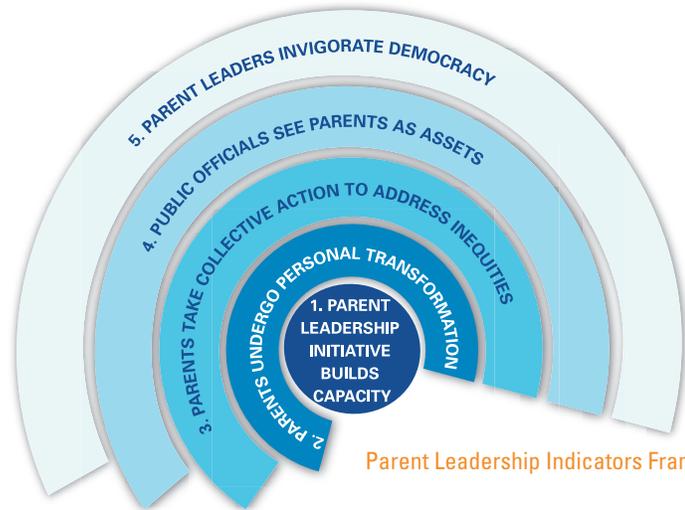
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Parent Leadership Indicators Framework

APPENDIX A

About the Parent Leadership Indicators Framework

(Updated Spring 2017)

Given the vision for the evaluation of PLIs that we outlined in this paper, our goal is to develop tools and supports that will help make rigorous evaluation more feasible and relevant for PLIs. We have tried to balance the priorities of parent leaders and other stakeholders and to be realistic about the time and capacity constraints facing PLIs. This work began in spring 2016 and is currently ongoing. In this appendix, we describe what we have done and where we are going.

Our approach to developing a parent leadership indicator framework

WHERE WE BEGAN

We used the theory of change developed collaboratively with parent leaders in the first phase of this project as a

starting point (Henderson & Gill Kressley 2016). While we recognize that each initiative will have its own distinct theory of change, we hope that ours is broadly applicable and useful in describing and connecting change at the individual and community level.

After we developed the theory of change, we reviewed existing empirical and theoretical research on parent and family leadership initiatives (see Appendix B) to determine the indicators identified in those studies that aligned to the theory of change. We incorporated two existing indicator frameworks – one for evaluating leadership development (Reinelt, Foster & Sullivan 2006) and one for evaluating community organizing (Gold, Simon & Peralta 2013). Because indicator frameworks on these topics already existed and implied that others had already synthesized the literature, we did not review individual sources on community organizing and general leadership development.

Next, we searched for measures appropriate to the indicators. As we anticipated, the program and personal transformation aspects of parent leadership have been much more extensively researched, and we were able to identify more validated measures (especially quantitative measures) that align to those indicators than the indicators related to public officials, collective action, and democracy. We identified traditional research methods – including observations, interviews, and document review – that could be used to gather data on many indicators. We also reviewed methods and approaches drawn from developmental evaluation,

evaluations of community organizing and social movements, and participatory evaluations of community-based organizations and initiatives. In reviewing methods, we prioritized qualitative, narrative methods that would center parent leaders' stories and reflect impacts at multiple levels. Our goal is a flexible framework that provides starting points and tools but doesn't prescribe measures and supports participatory approaches in which stakeholders collaborate to refine a theory of change and select appropriate methods and measures.

Feedback from our advisory board

After we developed a first draft of our indicator framework and review of methods, we sought feedback from our advisory board, consisting of parent leaders, PLI staff, funders, evaluators, and researchers. They raised concerns about the appropriateness of some of the quantitative measures we had included in the framework: first, that the measures had been validated with populations that don't reflect the makeup of PLIs, and second, that the measures might be drawn from disciplines and theoretical frameworks that employ deficit narratives about parents of color and thus contradict our racial justice goals.

In response to the concern that the measures had been validated with populations that don't reflect the makeup of PLIs, we reviewed all of the scales that we initially recommended with published studies describing how

they were validated. It is common practice for researchers to validate their scales – that is, to use a rigorous set of methods to test whether the scales they develop are measuring what they intended (validity) and whether they are measuring this consistently (reliability). However, validating the scale with diverse populations is typically not a necessary requirement for researchers to be able to state that their scale is valid and reliable. Therefore, we sought to answer the question: “To what extent have existing measures of parent leadership indicators been validated with diverse populations?”

We found that while a number of the validated scales and measures that we selected have been used in different contexts and with diverse groups, few have been validated with the diverse groups that tend to participate in PLIs, and many do not report sample demographics at all. Out of the 23 scales, 8 of the validation studies did not report race/ethnicity, education level, age, or income. Of those studies that did report race, on average, 70 percent of the test population was White. The purpose of this review was not to evaluate the overall validity and reliability of these scales, so we cannot state that one measure is more valid than another because of the population with which it was validated. Our aim is to illustrate the need for scales and measures that have been validated with the diverse populations that participate in PLIs.

The advisory board also raised the possibility that the length and level of specificity of the framework would seem overly prescriptive to PLIs. They suggested we limit the framework to

core indicators of effective parent leadership that would be relevant to a broad range of initiatives. Based on the feedback of the advisory group, we reorganized the indicator framework to prioritize core indicators and to more explicitly articulate racial justice and healing as guiding principles for the framework, and expanded our review of methods to include additional narrative approaches.

Site visits to parent leadership initiatives

In spring 2017, we conducted site visits to PLIs to gather feedback on the framework. These PLIs included A Resource in Serving Equality, in Alamo, Texas; Choice 4 All, in Roosevelt, Long Island; the Parent Leadership Initiative of Long Island; and the Head Start Policy Council at Moore Community House, in Biloxi, Mississippi. During our visits, we gathered feedback from parent leaders, program staff, and community partners about the substance, language, and structure of the indicator framework. This feedback – from initiatives that are diverse in terms of their model, focus areas, the population with which they work, and social and historical context – has informed our final round of edits.

What's next?

WEBSITE

In late fall 2017, we will release a website that will house all of the indicators, as well as recommendations for methods and tools that align with each indicator. We anticipate that program staff, parent leaders, and evaluators will

be able to use the website to choose indicators to measure and seek ideas about how to measure them. We will not make recommendations yet for survey tools, as we are still in testing mode.

ONLINE SURVEY TOOLS

By spring 2018, we anticipate that we will have a suite of survey tools ready for PLIs to use with participants. We are currently working with Algorhythm, an “impact science” company that enables non-profit agencies to collect rigorous evaluation data and to make meaning of it in real time. Non-profits can see the data they collect immediately, rather than having to wait until the data are no longer useful for making improvements. Algorhythm’s technical expertise, combined with its philosophical alignment with the values of participatory evaluation, makes this company a natural partner. Algorhythm will support our team to develop quantitative measures that are valid, reliable, and relevant to the lives of parent leaders. Once these tools are finalized and have been piloted, all PLIs will be invited to use the Algorhythm platform (expected summer–fall 2018).

PILOT PARENT LEADERSHIP EVALUATION NETWORK

Once we have finished the indicator framework, we want to ensure that PLIs have the capacity to use the framework to evaluate their work and the opportunity to share and seek ideas from peer organizations. Thus, we are forming our inaugural cohort of a parent leadership evaluation network, which will consist of five to seven PLIs. Network members will have access at

no cost to training and technical assistance in evaluation led by Project Impact, an organization that helps non-profits to define and evaluate impact and improve programs and strategies based on evaluation. This training will support PLIs to identify the outcomes they wish to measure and give them the tools they need in qualitative and quantitative evaluation. Our team will learn from the network about how to build ongoing supports for PLIs that wish to evaluate their work.

APPENDIX B

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