



Catalyzing Education Reform in Oregon: Results of The Chalkboard Project's Civic Engagement Efforts 2007-2009

Companion piece to:

*Stimulating Education Reform in Oregon: Lessons Regarding an
Uncommon Philanthropic Collaboration*

Prepared for The Chalkboard Project
by Organizational Research Services
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This report was prepared by Anne Gienapp and Joelle Cook of Organizational Research Services (ORS) with support from Carolyn Cohen, Cohen Research & Evaluation, LLC. ORS and Cohen partnered to design and implement evaluation of Chalkboard's civic engagement efforts. Based in Seattle, WA, ORS was founded in 1989 and is a recognized leader in the design and implementation of practical and effective evaluations for non-profit, philanthropic and public organizations. Cohen Research & Evaluation supports clients through facilitating strategic learning, conducting program evaluation and building internal evaluation capacity.

Executive Summary

Five Oregon foundations came together in 2003 to create a collaborative alliance called Foundations for a Better Oregon (FBO). A sixth philanthropic partner joined FBO in 2008.¹ FBO's sole effort to date is the Chalkboard Project (Chalkboard), a joint venture focused on achieving specific improvements to Oregon's K-12 education system.

Chalkboard's goal is to elevate student achievement and propel Oregon's K-12 system to be within the top ten nationally, a pursuit for which the group employs civic engagement as a key strategy. Chalkboard's civic engagement efforts include activities that provide the public with credible information, build broad support, promote a stronger voice among stakeholders, and mobilize key individuals and groups to advocate for education reform.

In early 2010, through support from the W. K. Kellogg Foundation, Chalkboard engaged Organizational Research Services (ORS) and Cohen Research & Evaluation to design and implement an evaluation of Chalkboard's civic engagement efforts between 2007 and 2009. Evaluation questions addressed the extent to which Chalkboard's civic engagement activities led to progress in education reform in Oregon. The evaluation was based on data collected via 31 key informant interviews and review of background documents, operations and evaluation reports, and editorials and media coverage.

Data presented in this brief provide evidence that Chalkboard's civic engagement efforts directed at education reform in Oregon contributed to distinct outcomes during the 2007 to 2009 time period. Together with key partners, Chalkboard implemented effective advocacy with decision-makers, influential leaders and education stakeholders that led to achievement of notable policy outcomes, including the following:

- **Adoption and funding of the teacher mentoring bill** in 2007; funding for teaching mentoring was included in the 2009 Governor's budget
- **Improved school financing** via a one-time diversion of the state's "kicker" corporate tax rebate

¹ FBO's six current member foundations are: The Collins Foundation, The Ford Family Foundation, The JELD-WEN Foundation, Meyer Memorial Trust, The Oregon Community Foundation and The James F. and Marion L. Miller Foundation.

- **School business review practices** that allowed the state Department of Education to hire private auditors (as opposed to the Secretary of State’s office) to examine the business practices of selected school districts and education service districts every six years
- **Adoption of teacher professional development standards** by the Oregon State Board of Education in 2008
- **Adoption and funding of the teacher professional development bill** in 2009 to create teacher professional development commission and clearinghouse

Recognizing that effecting broad policy changes typically occurs over a long time frame, evaluators identified several interim outcome areas (i.e., kinds of changes that may result from advocacy efforts on the way to policy change). These interim outcome categories were widely vetted with advocates, funders and evaluators, all of whom agreed that the categories correspond with key areas of progress toward achievement of policy reform goals.¹ Data illustrate Chalkboard’s effectiveness in advancing specific interim outcomes related to its civic engagement efforts. Interim policy outcomes included the following:

- **Positive changes in the content and tone of civic dialogue regarding education reform;**
- **A strengthened base of support for education reform;**
- **Strengthened partnerships and alliances; and**
- **Increased organizational capacity.**

Though external factors – such as Oregon’s political and economic landscape - created certain challenges, key informants repeatedly referenced ways in which Chalkboard’s efforts had been influential and contributed to achieving identified results. Below are specific examples of how Chalkboard’s civic engagement efforts influenced results:

- **Chalkboard provided relevant, accessible research and data that were referenced by decision-makers, the media and the public**
- **Chalkboard was widely perceived as a credible, neutral “third party” in the policy arena**
- **Chalkboard built and leveraged relationships with strong legislative champions**
- **Chalkboard developed and capitalized on key partnerships and alliances**
- **Chalkboard received positive, consistent media and editorial coverage**

Introduction

In early 2010, with support from the W. K. Kellogg Foundation, the Chalkboard Project (Chalkboard) engaged Organizational Research Services (ORS) and Cohen Research & Evaluation (Cohen), Seattle-based consultants, to design and implement an evaluation intended to explore and document results of Chalkboard’s civic engagement efforts from 2007-2009. This brief presents evaluation data that serve to achieve the following:

1. Identify and provide evidence of specific results of civic engagement that Chalkboard can share with current and future funders, and
2. Help Chalkboard to learn from past civic engagement and advocacy efforts and results to effectively target strategies going forward.

This brief is organized by six sections: a short background section is followed by a section describing evaluation design and methods; the third section describes Chalkboard’s civic engagement efforts from 2007 through 2009; the fourth section identifies policy results and other interim outcomes (i.e., changes or signs of progress related to education reform in Oregon) and describes how Chalkboard’s efforts influenced or contributed to outcomes and results; the fifth section briefly notes external factors that were relevant to Chalkboard’s efforts during this time and the final section summarizes key results.

A separate brief, prepared by ORS, presents findings related to philanthropic collaboration within Foundation for a Better Oregon (FBO) and describes how FBO’s collaborative model strengthened Chalkboard’s civic engagement between 2007 and 2009.

Background

In 2004, FBO, a collaboration of six Oregon foundations, launched the Chalkboard Project.² The focus of FBO and the Chalkboard Project is on improving Oregon’s K-12 public schools. Chalkboard describes itself as “a nonpartisan nonprofit working to unite Oregonians to make our K-12 public schools among the nation’s best in terms of student achievement.”ⁱⁱⁱ

² FBO’s six current member foundations are: The Collins Foundation, The Ford Family Foundation, The JELD-WEN Foundation, Meyer Memorial Trust, The Oregon Community Foundation and The James F. and Marion L. Miller Foundation (joined FBO as a partner in 2008).

Chalkboard’s approach to change is grounded in its civic engagement strategy, an approach defined as “activities that provide the public with credible information, build support and a stronger voice among stakeholders, and mobilize key individuals and groups to advocate for education reform.”ⁱⁱⁱ Chalkboard’s breadth of civic engagement activities has included raising public awareness of education reform issues through grassroots efforts; engaging and partnering with key influencers; and developing and implementing district-level change models as a strategy to influence education policymaking.^{iv}

Evaluation Design and Methodology

Evaluators, in conjunction with Chalkboard staff and board members, developed a series of questions to guide evaluation efforts. The overall questions underlying data collection efforts were as follows:

- What were influential factors that contributed to adoption of state level policy changes from 2007 to 2009?
- What were interim signs of progress related to education reform efforts, and how did Chalkboard’s civic engagement efforts influence or contribute to progress?
- In what ways did Chalkboard’s initial civic engagement efforts with Oregon citizens (2004-2005) contribute to policy changes and other outcomes?
- What were other factors that facilitated and/or challenged Chalkboard’s civic engagement efforts or results (e.g., external context)?

To address these questions and evaluate Chalkboard’s civic engagement, ORS conducted a broad review of past reports, media coverage and other background materials and completed 31 key informant interviews. Key informants included those with the following role or relationship to Chalkboard: current and former staff and advisors; board members; members of the Oregon state legislature; Chalkboard’s civic engagement partners, and representatives of the local, state and national educational sectors. Further details regarding the evaluation design and data collection methods are provided in **Appendix A**. A full list of key informants is found in **Appendix B**.

Chalkboard's Civic Engagement Efforts 2007 to 2009

Chalkboard's goal is to elevate student achievement and propel Oregon's K-12 system to be within the top ten nationally, a pursuit for which the group employs civic engagement as a key strategy. This civic engagement effort includes activities that provide the public with credible information, build support and a stronger voice among stakeholders, and mobilize key individuals and groups to advocate for education reform. Initiatives during 2007-2009 included the following:

Chalkboard's goal is to elevate student achievement and propel Oregon's K-12 system to be within the top ten nationally.

1. Commissioning and disseminating public opinion and best practices research, including research related to the CLASS model³
2. Legislative advocacy
3. Convening education stakeholders, including stakeholders in districts where Chalkboard piloted the CLASS model
4. Media outreach and engagement
5. Engagement of influential individuals and groups and building of alliances

The Chalkboard Chronicle, a commissioned piece that was produced in 2007, provides a detailed description of Chalkboard's launch and first years of implementation (2003-2006).⁴ A brief overview of this period is provided here

³ CLASS stands for *Creative Leadership Achieves Student Success*. CLASS, a signature project of Chalkboard, is an innovative education initiative designed to empower teachers and raise student achievement. It is built around four components linked to effective teaching: expanded career paths, effective performance evaluations, relevant professional development, and new compensation models. CLASS is jointly supported via the investments of Chalkboard and local school districts. For more information, see: <http://www.chalkboardproject.org/what-we-do/class.php>.

⁴ *The Chalkboard Chronicle*, written by Joe Hertzberg et al., documents the creation and early efforts of Foundations for a Better Oregon (FBO) and the Chalkboard Project (Spring 2003-Fall 2006). *The Chronicle* was funded by the W.K. Kellogg Foundation to provide other foundations with information, ideas and materials to help them determine whether a collaboration of this kind might be of interest.

for context. (Note: In the following sections, specific data sources and references are cited; details regarding sources are provided in endnotes.)

Chalkboard's initial civic engagement strategy, which began in 2004, was a broad-based effort to obtain direct input from Oregonians regarding their values and beliefs around education. Following Chalkboard's public launch in June of that year, Chalkboard undertook or commissioned a number of different engagement activities including regional meetings throughout the state, community discussion groups in all 36 Oregon counties and an online survey.^v In addition, Chalkboard collected the views of 1,800 Oregonians in a statewide poll.^{vi} At the time, Chalkboard's commissioned research was the most comprehensive public opinion survey on education ever done in Oregon.^{vii} This initial civic engagement work resulted in Chalkboard's 15-point Action Plan, announced in June 2005.^{viii}

As Chalkboard transitioned to implementation of its 15-point Action Plan, it also adjusted its civic engagement to focus more on engagement of key influencers. The following section describes civic engagement strategies undertaken by Chalkboard during the 2007 to 2009 time period. Implementation of multiple efforts allowed Chalkboard to engage

Implementation of multiple civic engagement efforts allowed Chalkboard to engage Oregonians in many different ways; its multi-pronged approach may have been a key contributing factor to Chalkboard's successes.

Oregonians in many different ways; its multi-pronged approach may have been a key contributing factor to Chalkboard's successes. To implement varied civic engagement strategies, Chalkboard relied on its core staff and a ready pool of consultants and advisors. Chalkboard's staff, which included those experienced in legislative advocacy, education, coalition building and media communications, demonstrated a high degree of skill and expertise in the policy realm that was recognized by key informants. Chalkboard relied on consultants to conduct research and polling and to advise on and support strategic communications and decision-making. Chalkboard's civic engagement efforts between 2007 and 2009 included the following:

1. Commissioning and Disseminating Research

From 2007 to 2009, Chalkboard continued to commission and disseminate public opinion and other research regarding best practices in education. For example, in May 2008 Chalkboard and the Oregon Education Association (OEA) jointly commissioned a statewide teacher survey to find out how Oregon could improve its system of delivering professional development for teachers.^{ix} Chalkboard also commissioned issue papers regarding teacher effectiveness and school district administrative efficiencies. Finally, Chalkboard continued to produce an annual report to the community regarding the status of K-12 education in Oregon.^x

2. Legislative Advocacy

Leading up to the 2007 legislative session, Chalkboard shifted its focus from broad-based citizen engagement to targeting key influencers—particularly legislators. In line with a deliberate strategy of partisan neutrality, Chalkboard hired a bipartisan lobby team to help educate and engage legislators. In addition, Chalkboard formed a four-member legislative point team consisting of representatives of both caucuses and both state houses. Legislative point team members were chief sponsors of all five Chalkboard-backed bills in the 2007 legislative session.^{xi}

Chalkboard entered the 2007 legislative session with an ambitious agenda focused on improving the education quality, accountability and financial status of K-12 public schools. Chalkboard asked the 2007 state legislature to approve five key initiatives: 1) promote teacher effectiveness by providing high-quality mentors; 2) strengthen professional development by establishing the Oregon Collaborative for Education Excellence; 3) target funding to early-age investments, including first grade class size reductions, K-3 reading support and phased in full-day kindergarten; 4) improve schools' fiscal accountability; and, 5) establish a guaranteed level of spending per student.^{xii}

Chalkboard continued its legislative advocacy leading up to and during the 2009 session. Despite turnover in the legislative point team following the 2007 session, data suggest that Chalkboard maintained a strong presence in

the state capital and continued to cultivate legislative champions. Additionally, Chalkboard sought to strengthen partnerships with aligned groups that could also advocate for Chalkboard's priorities, particularly Stand for Children and the Oregon Business Association. For the 2009 legislative session, Chalkboard had three legislative priorities, all of which focused on improving the effectiveness of classroom teachers and school principals. The primary aims were renewed funding of the Beginning Teacher Mentor Program, funding for a teacher professional development commission and clearinghouse, and more efficient business practices reviews for schools. A bill to expand state funding for Chalkboard's signature project, CLASS, was drafted; however, after strategic consideration, the measure was not introduced in the 2009 session.

3. Convening Education Stakeholders

Chalkboard continued its role as a convener of education workgroups between 2007 and 2009. The organization had convened two workgroups in 2006—one focused on education policy; the other on school finance. Through the workgroups, Chalkboard brought together education experts and education stakeholders from throughout Oregon and provided a way for educators to provide input into Chalkboard's agenda. Chalkboard incorporated workgroup findings and recommendations as it planned and pursued multiple civic engagement strategies between 2007 and 2009. In addition to convening the workgroups, Chalkboard hosted several meetings and statewide conferences for education stakeholders. In November 2008, for example, Chalkboard convened a forum in conjunction with the National Commission on Teaching and America's Future (NCTAF) that drew more than 100 education and community leaders to discuss the future of teaching in Oregon.^{xiii} An education representative who participated in the meeting described the importance of this gathering: "We had the opportunity to spotlight good things that were happening and lay out where the work needed to go to continue support for teaching quality in Oregon The forum keyed up a lot of important issues and engaged a broad group of stakeholders in the discussion."

In addition to its work with NCTAF on the 2008 forum, Chalkboard has served as the convening organization for Oregon’s Coalition for Quality Teaching and Learning since the Coalition’s creation in 2009. According to Chalkboard staff, the Coalition members include key education stakeholders, such as the State Superintendent of Public Instruction and the Chancellor of Higher Education.^{xiv} Chalkboard also convened teachers in less formal ways; for example, it held teacher focus groups throughout the state to listen to what educators had to say about their own career advancement and the direction of education in Oregon.^{xv}

Chalkboard also created a web-based forum for teachers, education stakeholders and the public to get information and share ideas. Through one particular project, Open Books, Chalkboard helps make available school district financial, achievement, student and teacher information through the Open Books website. On its own website, Chalkboard created a forum called the “Teachers Lounge,” a site where teachers may seek ideas and find useful resources, such as online lesson plans.

4. Media Outreach

From its inception, Chalkboard has had a very intentional, proactive media strategy. Chalkboard’s extensive media outreach included editorial board tours and guest editorials written by Chalkboard staff and partners. As a result of these efforts, major newspapers—such as The Oregonian in Portland and Salem’s Statesman Journal—ran editorials that echoed Chalkboard’s priorities and messages and praised its work.

5. Engaging Influential Individuals and Groups and Building Alliances

Chalkboard continued to engage Oregonians from 2007 to 2009, albeit with a narrower focus than pre-2007 civic engagement efforts. Seeking to build up its cadre of volunteers and supporters, Chalkboard continued to dedicate resources to expand and utilize its Citizen Corps - a network of community leaders. For example, Citizen Corps members participated in Chalkboard’s 2009 legislative Advocacy Day and helped to communicate Chalkboard’s legislative agenda during personal visits with their district legislators.

In addition to engaging citizens, Chalkboard sought to engage parents through its Running Start initiative and via a joint effort with the Oregon Department of Education (ODE) through ODE's Family Involvement Policy. Chalkboard's Running Start was partly designed to help parents become full partners in the education of their children by providing materials to low-income and minority parents. In addition to Running Start, Chalkboard funded 10 school districts to implement an ODE policy template that helped schools reach out to parents in new ways and encouraged adoption of new policies and practices intended to foster better communication between parents and schools.^{xvi}

Finally, Chalkboard worked to engage educators and education stakeholders. In June 2009, Chalkboard launched the Teacher Corps—an organization similar to its Citizen Corps—to foster an open dialogue among teachers and other education stakeholders on the most impactful steps Oregonians can take to support the professional practice of teaching.^{xvii} Chalkboard also directly engaged key education stakeholders at the district level through implementation of its CLASS (Creative Leadership Achieves Student Success) Project. In 2008, Chalkboard began to work closely with three Oregon school districts to develop, pilot and evaluate the CLASS Project. Nine additional districts received CLASS planning grants in 2009 and have developed a plan for how CLASS would be implemented in their districts.

Key Findings: Results of Chalkboard’s Civic Engagement Efforts

This section describes policy and other interim outcomes connected to education reform achieved between 2007 and 2009. Policy outcomes included documented legislative results, such as the adoption of bills that provided funds for mentoring and a professional development clearinghouse, as well as other kinds of results, including committee decisions, administrative decisions and special appropriations. Evaluation data provide evidence that, in addition to policy outcomes, other types of progress also occurred in areas associated with advocacy and policy-change efforts. Key outcomes resulting from 2007 to 2009 are listed in **Table 1**, below. This section presents data that explore outcomes in more depth and help explain how Chalkboard’s civic engagement efforts contributed to these positive changes.

Table 1: Outcomes Related to Chalkboard’s Civic Engagement Efforts 2007-2009

Policy Outcomes	Interim Policy Outcomes
<ul style="list-style-type: none"> ■ Teacher mentoring bill (OR HB 2574, adopted and funded in 2007; in 2009, mentoring was included in Governor’s budget and funded) ■ One-time “kicker” reform ■ Transportation savings ■ School business reviews ■ Teacher professional development clearinghouse bill (OR SB 443, funded in 2009) ■ Teacher professional development standards adopted in 2008 by the Oregon State Board of Education 	<ul style="list-style-type: none"> ■ Positive changes in the content and tone of discussions regarding education reform in Oregon ■ Strengthened base of support for education reform ■ Strengthened partnerships and alliances ■ Increased organizational capacity

Key Findings: Policy Outcomes

Chalkboard’s legislative priorities and policy change goals during the 2007-2009 time period are described earlier in this brief. As shown in **Table 1** above, Chalkboard realized several policy outcomes between 2007 and 2009. These policy outcomes included adoption of the Teacher Mentoring Bill in 2007 and adoption of the Teacher Professional Development Bill in 2009. Chalkboard was instrumental in building support for teacher professional development, having also advocated for the adoption of professional development standards based on the national standards (federal benchmarks which the Oregon State Board of Education instituted in 2008).^{xviii} In addition to the adoption of the Chalkboard-backed Mentoring Bill in 2007, funding for both mentoring and teacher professional development was included as priority items in the Governor’s 2009 budget. Support for teacher professional development was also evident within the state Senate; the bill was listed on the Senate Democratic Caucus’s short-list of 2009 legislative priorities.

In addition to the passage of the Teacher Mentoring and Teacher Professional Development bills, Chalkboard’s advocacy also resulted in one-time “kicker” reform,⁵ a student transportation cost study and school business reviews. Progress in these areas is described in more detail in **Table 2** below.

⁵ A one-time diversion of the state’s corporate tax rebate (“kicker”) which established Oregon’s first-ever comprehensive rainy day fund to hedge against decreasing budgets and maintain support for key services, including public education.

Table 2: Chalkboard’s 2007 and 2009 Policy Priorities and Outcomes^{xix}

Session	Priority Area	Progress	Brief Description
2007	Teacher effectiveness: mentoring	Bill adopted	New teachers, principals and superintendents will receive high-quality mentors for two years. Chalkboard and Stand drafted legislation.
	Improved school financing	One-time reform of corporate tax rebate (“kicker”) adopted	Chalkboard supported a one-time diversion of the “kicker” corporate tax rebate to establish Oregon’s first-ever comprehensive rainy day fund to support key services, including public education.
	K-3 student support	Some progress	Options to lower K-1 class sizes and provide more K-3 reading tutors were included as ways in which schools could apply “school improvement” funds.
	Teacher effectiveness: professional development	Bill was not passed	Proposed legislation to create a statewide network to deliver rigorous professional development programs for educators and set quality standards.
	School financing: per-student funding floor	Bill was not passed	Proposal to establish a per-student funding guarantee that created a “floor” of state spending on K-12 education.
	Fiscal accountability: management best practices	Some progress	Established best financial management practices for districts and requires mandatory school business practices reviews, begins restructure of school transportation funding formula and phases out permanent early retirement programs.
	Transportation savings	Restructure concept placed in budget note	Bill was not adopted, but idea was picked up by Ways & Means which directed the state Department of Education to conduct a thorough study of public school transportation systems to look for ways to operate more efficiently.
2009	Teacher effectiveness: mentoring	Renewed funding	\$5 million in renewed funding for the Beginning Educator Mentor Program; included in Governor’s budget and reinstated in Ways & Means Co-chair budget after initial critical cutback.
	Teacher effectiveness: professional development	Bill adopted	Established a teacher professional development commission and web-based clearinghouse listing high-quality professional development programs for teachers. Included as priority item in the Governor’s budget (\$130,000 for the biennium).
	Fiscal accountability: school business reviews	Amendment passed; bill left undone at sine die	Allowed the state Department of Education to hire private auditors (as opposed to the Secretary of State’s office) to examine the business practices of selected school districts and education service districts every six years.

How Chalkboard's Efforts Contributed to Policy Outcomes

Evaluators asked key informants to identify how Chalkboard's efforts were influential in the achievement of the policy results noted in **Table 2**, above. Despite external factors that created certain challenges (discussed in more detail in a later section of this brief), key informants referenced the importance of Chalkboard's efforts and its contribution to achieving identified results. Key themes from the data are presented below:

- **Chalkboard's relevant, accessible research and data were influential to achievement of policy outcomes.** While recognizing that data alone is rarely a singular influence on policy decisions, several respondents across all informant groups said that Chalkboard's research and data helped educate and influence leaders and decision-makers, ultimately leading to adoption of the teacher mentoring and teacher professional development bills. Leading up to and during the 2007-2009 time period, Chalkboard commissioned a number of research efforts, including economic research on specific programs and best practices, as well as public opinion studies to help document Oregonians' views and beliefs about education and education reform approaches. Chalkboard also worked diligently to disseminate results of its commissioned research to legislators, key education stakeholders and Oregonians more broadly. Legislators and civic engagement partners noted that Chalkboard's research was valuable because it both identified problems (e.g., teacher retention rate) as well as solutions (e.g., recommendations for more efficient school business practices). When asked if Chalkboard's research was influential in adoption of the teacher mentoring and professional development bills, one legislator said, "That is a big yes."

Legislative respondents pointed to specific research they had used or heard about—including Chalkboard’s public opinion data, its work on closing the achievement gap and its research on the impacts of teacher effectiveness. In addition, one legislator remarked how accessible Chalkboard’s research and data had been: “Many of us bring laptops to our committee meetings. If certain information comes up we can log on to verify it. . . . (Thanks to Chalkboard’s) openness to share data on its website, (they were) easily accessible.”

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A civic engagement partner explained her perception of the value of Chalkboard’s research with regard to the adoption of the two bills: “(Chalkboard) did a fabulous job collecting and sharing data on mentoring (which proved) to be such a useful tool. Similarly, Chalkboard found professional development standards and crafted the legislation.” According to a board member, several leaders and decision-makers publically expressed the view that Chalkboard’s research “provided unassailable testimony” regarding best practices in education. Further, informants across all groups described Chalkboard’s commissioned research as “objective” and “neutral”—perceptions that enhanced the credibility and use of Chalkboard’s studies in the policy arena.

- **Perceptions of Chalkboard as a credible, neutral “third party” contributed to policy outcomes.** As mentioned previously, Chalkboard’s shift to pursue a targeted advocacy agenda reflected a new strategy that built on previous efforts. As a new voice in the advocacy realm, Chalkboard was occasionally questioned early on. However, key informants from across stakeholder groups affirmed that by the end of the 2007 session, Chalkboard had begun to build strong credibility. A district representative explained, “When (Chalkboard) started there was a feeling that . . . they wanted to come in and fix education instead of work as a collaborative partner, but that is what they have moved to. (Now Chalkboard is) knowledgeable and respected by those of us who are doing this work daily.” The Salem Statesman Journal echoed this respect for Chalkboard in an editorial: “In its first five years, the

independent Chalkboard Project has emerged as the most trusted voice on education reform in Oregon. It has done so by supporting effective, research-based strategies; honoring Oregonians' passion for public involvement; and respecting local decision-making."^{xx}

Staff, board members and district representatives saw Chalkboard's early broad-based civic engagement work as a key contributing factor to policy outcomes. As one staff remarked, "Our civic engagement work brought us to the table in a credible way." A board member explained further, "Legislators knew we'd been in town, which generated visibility for us. If we hadn't done (the broad-based civic engagement) no one would have known who we were when we walked into the capitol and we would have been marginalized."

Representatives of school districts expressed that Chalkboard's earlier civic engagement with Oregon citizens "set up" the later legislative work. One school district representative said, "Having conversations on the ground and hooking up people in communities with local elected officials (helped to bring) the conversation volume up (regarding Chalkboard's policy priorities) and that has been very helpful."

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- **Chalkboard's strong legislative champions contributed to achievement of policy outcomes.** Going into the 2007 legislative session, Chalkboard's agenda was described by several informants as large and ambitious. The members of Chalkboard's legislative point team were strong champions in the policy arena. Many civic engagement partners and state educational sector representatives reported this was "a very important piece" propelling adoption of the teacher mentoring bill and other results in 2007. A state education representative remarked, "It was pretty rocky there at times; (Chalkboard) didn't have huge support . . . but they had enough." Another education representative recalled

that during the 2007 session legislative champions helped gather support, and “once (elements from Chalkboard’s agenda) looked like (they) would be a successful, I think others hopped on.”

Data also suggest that over time, Chalkboard’s efforts helped to foster increased breadth and depth of support for its priorities among key influencers. A state education representative pointed out that while legislative support may have been more “iffy” in 2007, by 2009 Chalkboard “had legislators’ attention.” Support from legislative champions was strong in 2007. But when legislative champions moved on to other positions, an education representative noted, “There were other (champions) and I know Chalkboard helped to cultivate them A growing number of policymakers are beginning to be willing to move away from their traditional political base and have some riskier conversations politically.” Informants felt that while other factors played a role, this change was in part due to Chalkboard’s efforts.

- **Chalkboard’s partnerships and alliances were important.** A civic engagement partner remarked, “Where (Chalkboard) has had policy success and could have more is when it finds partners.” Staff, board, civic engagement partners and representatives of the state education sector identified Chalkboard’s partnerships and alliances—especially those with Stand for Children and the business community—as influential to achievement of policy outcomes. Establishing strong partnerships furthered Chalkboard’s credibility. District and state education representatives characterized this achievement as helping Chalkboard stay “above the fray” and “neutralize partisan politics,” both of which were key to its advocacy success. Informants remarked that Chalkboard’s partnerships were helpful in the policy arena; a larger chorus of voices helped to bring increased attention to Chalkboard’s priorities. Partnership with Stand for Children (Stand) seemed to be particularly helpful because it extended Chalkboard’s reach and capacity. A civic engagement partner remarked, “(With Stand) I think (Chalkboard) could do more—get more educators into the building, have a more regular presence, meet with more legislators.” Partnering with Stand also helped further Chalkboard’s reach and influence as Stand and Chalkboard had different, but overlapping, constituencies; informants noted that Stand helped Chalkboard “fill gaps” in its civic engagement efforts.

Some civic engagement partners and state education representatives also noted Chalkboard's efforts to build alliances with key education stakeholders, such as the Confederation of Oregon School Administrators (COSA) and the Oregon Education Association (OEA), following the 2007

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session. Staff expressed this insight: "We realized during the 2007 session that we needed stronger relationships with key superintendents who could speak up for our work." Because COSA and, in particular, OEA had strong political capital, civic engagement partners and some state educational sector representatives noted that Chalkboard's alignment with these groups was helpful to achieving legislative priorities. Speaking about legislative results in 2009, a state education representative explained, "(After 2007) Chalkboard moved away from getting headlines to trying to engage people who had the real power and spent more time trying to bring them along. I think that was absolutely essential . . . a big part of (Chalkboard's) success."

■ **Positive media and editorial coverage contributed to policy outcomes.**

Chalkboard staff noted that "(our media strategy) has been critical . . . and we manage that actively." Several informants affirmed that Chalkboard's media communications efforts were strong: "(Chalkboard) has great PR and got lots of editorial mentions." One civic engagement partner referred to Chalkboard as a "media darling." Some thought that Chalkboard's media attention and support (especially in the populous Portland metropolitan area and the state capital, Salem) helped get legislators' attention. Recalling a legislator's remarks, a staff member described reaction to media and editorials during the 2007 session. The legislator said, "Every time I turn on the radio, all I hear about is Chalkboard." Data show that Chalkboard had consistent, strong and complimentary media coverage and that positive media and editorials influenced the achievement of policy outcomes. However, some key informants noted that media coverage may not have been as important to achieving policy outcomes as other factors, such as Chalkboard's research, legislative advocacy, and its alliances and partnerships.

Key Findings: Interim Policy Outcome Areas

The policy outcomes achieved between 2007 and 2009 were notable, but they were not the only results that reflect Chalkboard’s influence on education reform in Oregon. Recognizing that broad policy change typically occurs over a long time frame, evaluators identified several interim outcome areas (i.e., kinds of changes that may result from advocacy and policy efforts that also are relevant to Chalkboard’s civic engagement). These interim outcome categories were widely vetted with advocates, funders and evaluators, all of whom generally agreed they reflect key areas of progress toward achieving policy reform goals.^{xxi} This section presents data that illustrate key interim outcomes related to Chalkboard’s civic engagement efforts, including the following:

- **Positive changes in the content and tone of civic dialogue regarding education reform;**
- **A strengthened base of support for education reform;**
- **Strengthened partnerships and alliances; and**
- **Increased organizational capacity.**

These are described further below.

- **Oregon has experienced a positive reframe of public dialogue about education reform.** Aligning messages with core and enduring social values is an important step in achieving policy outcomes. Data suggest that between 2007 and 2009, Oregon experienced a positive evolution of civic dialogue regarding education reform. As one representative of the state educational sector said, “(In 2007) Oregonians saw education as a glass-half-full issue.” Thus, education was not a high-priority issue. Between 2007 and 2009, Chalkboard managed to alter the tone of the debate and shift the general sense among Oregonians toward “the education glass is half-empty.”

“(In 2007) Oregonians saw education as a glass-half-full issue.” Between 2007 and 2009, Chalkboard managed to alter the tone of the debate and shift the general sense among Oregonians towards the view that the glass is half-empty.

According to informants, Chalkboard’s civic engagement efforts helped catalyze this reframe. A representative of the state education sector noted, “Before, we were doing a disservice to ourselves by believing all our kids were above average. (Chalkboard’s efforts) helped Oregonians understand we could be so much better . . . (and) helped change a point of view. . . . They are not running around telling everyone that all is fine. They are pointing out the deficits more often. That is part of what we needed: to get the public and the policy makers to be open to (making) changes.” Informants noted that Chalkboard was instrumental in keeping education reform on the minds of practitioners and policymakers and helped to spark a “growing sense of urgency around the need to get education reform on the table,” an awareness that led to changes in the tone of education reform discussions. A legislator described how the dialogue around education had changed in Salem: “In 2005, it was just about the dollars. After 2007 it was more about the policy and the connection (to) targeted best practices in the classroom.” The legislator went on to credit Chalkboard, whose data and research helped to identify best practices and associated policy recommendations.

Data suggest that part of Chalkboard’s power in reframing debate stemmed from the group’s support from six well-respected Oregon foundations. One civic engagement partner said, “(With Chalkboard), this is the first time that somebody with some political capital and some money behind them has stood up to all these bureaucracies.” A representative of the national education sector explained how, because of FBO’s backing, Chalkboard was in a unique position to effect change: “Chalkboard is able to affect policy and fund change. Generally those two things reside in two separate entities. Often you will find a group that comes together that will impact change but they are not a funding entity or vice versa. I think it is a great combination.” An editorial described the power of FBO’s collaborative work in Chalkboard and expressed support for the work: “This group of avant-garde thinkers and doers is quickly leaving hand-wringers behind as they study and plan and dream for a better education for all Oregon youngsters, urban and rural We fully support the Chalkboard Project in their endeavors this legislative session, and we urge you to do the same.”^{xxii}

Data also suggest that Chalkboard’s close work with individual school districts helped change local conversations. Because the CLASS model both promotes and depends on engagement among local stakeholders and is designed to be flexible and tailored to local circumstances, many educators and administrators found CLASS reforms to be “not as scary” as they had anticipated. Chalkboard’s effectiveness as convener and facilitator with CLASS districts, along with the

Chalkboard’s effectiveness as a convener and facilitator with CLASS districts, along with the credibility of their education policy director, helped achieve buy-in among participating districts regarding the importance of reforms related to teacher effectiveness. This has contributed to an increased level support for Chalkboard’s priorities among education practitioners.

credibility of their education policy director, has helped achieve buy-in among participating districts regarding importance of reforms related to teacher effectiveness and has contributed to an increased level support for Chalkboard’s education reform priorities among education practitioners. An education representative explained: “I think (CLASS) is opening the door for us to talk about doing other things. Without Chalkboard’s work we could have never gotten that far. It may be influencing what this or that district (now thinks is possible). I know it is influencing us and gubernatorial candidates as far as what they think is possible.”

- **Chalkboard cultivated a strong base of support for education reform.** Related to strengthened partnerships, data provide evidence that Chalkboard’s efforts also helped to strengthen the breadth and depth of support for education reform. Chalkboard’s commissioned research and public opinion polling, along with its persistent media communications work, created an effective “call to action” that was increasingly heeded. For example, Chalkboard established and was able to call on its Citizen Corps of community leaders who support Chalkboard’s education reform priorities and help deliver Chalkboard’s messages to their communities. Citizen Corps members, whose numbers grew from 60 in 2007 to around 500 in 2009, participated in Chalkboard’s 2007 and 2009 legislative Advocacy Day in Salem, meeting personally with Oregon legislators. Data suggest this legislative advocacy not only resulted in increased legislative support for Chalkboard’s educator-quality agenda, but also helped further galvanize the commitment of Citizen Corps members. According to Chalkboard staff, all participants said they would attend another advocacy event.

Data also indicate that Chalkboard was able to gain support from groups focused on the needs of minority students, such as the Black Parent Initiative, during the 2007 to 2009 time period. The support from these groups was primarily due to Chalkboard's commissioned research on closing the achievement gap.

Data indicate that Chalkboard was able to cultivate broader and deeper support from educators and district superintendents. While staff, advisors and civic engagement partners noted challenges associated with Chalkboard achieving progress on its priorities via engaging solely with state groups, one partner noted: "(Chalkboard) has made some good allies in terms of teachers, principals, and superintendents who love what they are doing (with CLASS)." Many of these CLASS district representatives have been willing to speak out on Chalkboard's behalf. As one informant civic engagement partner noted, "(In CLASS districts) they are beginning to hear teacher voices. School board members are also stepping forward and talking about the way they want to work in their district." Civic engagement partners also observed that support from local educators and administrators had increased despite weaker support (or even opposition) from the state union. One partner remarked on how implementation of CLASS has led to greater support for Chalkboard's efforts: "(CLASS) has built a level of success and credibility with decision-makers—not necessarily the traditional K-12 folks, but certainly those within that community." Several key informants across stakeholder groups advised that to really tip the political scales with education stakeholders, CLASS needed to build even broader support at the local level. Stakeholders also commented on the strong potential for this result via the excitement CLASS has generated and Chalkboard's potential to build additional support.

Finally, informants noted the support of business leaders and elected leaders, particularly certain legislators and the governor. Data indicate that during the 2007 to 2009 time period Chalkboard had strong legislative champions who spoke on behalf of Chalkboard's priorities. For example, the 2007 Chairman of the House Education Committee cited Chalkboard's research in an opinion piece urging citizens to support teacher professional development standards.^{xxiii} While Chalkboard staff described its support from the then current governor as "mixed," data indicated he eventually became more supportive of at least some of Chalkboard's priorities. As noted earlier, for example, as a result of Chalkboard's advocacy, two of Chalkboard's legislative priorities—Teacher Mentoring and Teacher Professional Development—were included in the 2009 Governor's budget.

■ **Chalkboard’s partnerships and alliances contributed to policy outcomes and also strengthened and deepened over time.**

Data suggest that Chalkboard was perceived in 2007 as the “new kid on the block” in the area of education reform. According to staff, Chalkboard knew this

meant it needed to form and strengthen partnerships. Data indicate that between 2007 and 2009, Chalkboard did just that—it developed visible, important and mutually beneficial alliances with Stand for Children and the Oregon Business Association—groups already active in education reform. Informants noted that during this period Chalkboard also strengthened alliances with local and national education groups, including Oregon Latino community organizations, the Oregon Black Parent Association, individual Oregon school districts (especially those involved in the design and implementation of CLASS), the National Commission on Teaching and America’s Future (NCTAF), and the Policy Innovators in Education (PIE) network.

Data indicate that Chalkboard also deepened its relationships with key education groups between 2007 and 2009. In particular, a stronger partnership between Chalkboard and the Oregon Department of Education (ODE) and other education stakeholders developed following Chalkboard’s creation of Open Books, a website that relies on ODE data to show how education funding is allocated. One civic engagement partner noted, “Chalkboard’s implementation of (Open Books) really did win over (education stakeholders who had previously been skeptical about Chalkboard’s priorities). Chalkboard was very honest about what its goals were. It allowed for a significant amount of input from stakeholders . . . and at the end of the day, got broad levels of buy-in from traditional K-12 advocates.” Chalkboard also nurtured a deeper relationship with the Oregon State Board of Education (OSBE), which, along with Chalkboard’s advocacy, contributed to the adoption of statewide standards for teacher professional development. Additionally, Chalkboard actively sought out education representatives to participate as members of its Advisory Council, a group that was formed in 2007. Informants explained that Chalkboard’s efforts with education groups were visible and well-received and demonstrated a commitment to partner. A civic engagement partner explained, “(Chalkboard has) reached out to the teachers association. They have reached out to the administrative group (COSA) . . . and partnered with Stand for Children. . . . That has gained them credibility and trust.” Speaking about Chalkboard’s growing partnerships with education groups, one district

Between 2007 and 2009, Chalkboard developed visible, important and mutually beneficial alliances with Stand for Children and the Oregon Business Association.

representative said, “Chalkboard has become more inclusive and engaged more in conversation (with practitioners). I think they learned about how things can get done in the political arena—you have to (have partners).”

- **Increased organizational capacity supported Chalkboard’s effective advocacy and policy change efforts.** Certain core capacities are critical to effective advocacy: leadership, skilled staff, stable finances, a well-articulated strategic plan, and the ability to be nimble and adaptive as opportunities emerge.^{xxiv}

Data provide strong evidence that Chalkboard demonstrated high capacity in all of these areas, abilities which likely contributed to policy outcomes and related interim changes. Several examples of Chalkboard’s capacity were referenced by informants, including Chalkboard’s strong staff and board leadership. One civic engagement partner explained the connection between Chalkboard’s leadership capacity and its effectiveness: “Given what (Chalkboard) collectively brings to the conversation, I don’t know if (its efforts) would have been as effective with other people at the helm.” District representatives specifically mentioned that the hire of an Education Policy Director in February 2007—a seasoned professional who brought in strong relationships with the education community—helped to increase both Chalkboard’s capacity and its credibility with that community.^{xxv}

Across key informant groups, respondents mentioned what has been identified as a key component of advocacy capacity: Chalkboard’s nimbleness and ability to adapt its strategies and tactics over time.^{xxvi} Chalkboard’s adaptiveness was facilitated by several mutually reinforcing factors: secure funding, the skills and expertise of Chalkboard’s president (who recognized emergent opportunities and sought timely advice from Chalkboard consultants), and the board’s investment of trust in Chalkboard staff and their decisions. Describing how Chalkboard displayed its adaptiveness following the 2007 legislative session, several advisors and partners described how Chalkboard had faced tough political battles when it was a relative newcomer to the policy arena. Key informants said that following the

Certain core capacities are critical to effective advocacy: leadership, skilled staff, stable finances, a well-articulated strategic plan, and the ability to be nimble and adaptive. Data provide strong evidence that Chalkboard demonstrated high capacity in all of these areas, abilities which likely contributed to policy outcomes and related interim changes.

session, Chalkboard sought and was receptive to critique and feedback from its advisors and civic engagement partners, including its Advisory Council, and used this feedback to strengthen its efforts. One key adjustment mentioned by many informants was Chalkboard's narrowed focus on policy priorities and targeted civic engagement efforts. One partner noted that experiences in the 2007 session seemed to help Chalkboard "fine tune" its civic engagement strategy: "(Chalkboard) became more coherent from a policy perspective." Another partner noted Chalkboard's shift after the 2007 session from "everything-and-the-kitchen-sink civic engagement" to a greater focus on education leaders and decision-makers. In addition, Chalkboard made changes within its lobby team to strengthen its efforts and ensure connections with legislators on both sides of the aisle. A few informants noted this helped ensure Chalkboard continued to be perceived as politically neutral, a view that was "important and productive" for its policy change efforts. Finally, Chalkboard began to implement pilot projects which involved some adaptation of its role. Through these projects, Chalkboard was able to

both broaden engagement with education stakeholders and begin development of an evidence base for some of its proposed priorities. Chalkboard's strategic adjustments have also contributed to interim outcomes such as strengthened alliances and partnerships.

While Chalkboard may not have gotten every result it wanted between 2007 and 2009, its multiple efforts represent "a great menu of achievement."

In addition to Chalkboard's strong leadership and willingness to adapt, data suggest that another indicator of Chalkboard's strong capacity was its ability to skillfully implement a combination of multiple efforts. Chalkboard's data and research, legislative advocacy, engagement of key influencers and implementation of CLASS seemed to work synergistically. One education representative observed, "It is one thing to be an advocate for change . . . but when that is coupled with rolling up your sleeves and trying something and showing what you find . . . I think you are on a much firmer ground for advocating for change." Speaking to Chalkboard's willingness to both adapt and "stick with it," a district administrator said, "I think the challenge of any organization engaged (in policy change efforts) is to keep that vision evolving. It is easy to get set in 'this is the way we do something' and stay focused on a product as opposed to a process . . . and I think (Chalkboard is) aware of this." A partner said that while Chalkboard may not have gotten every result it wanted between 2007 and 2009, its multiple efforts represent "a great menu of achievement."

External Factors that Influenced Chalkboard's Results

Education reform is a complex issue. Often it requires addressing entrenched interests that can affect both the scope and pace of progress.^{xxvii} Several informants across stakeholder groups described the inherent difficulties of education reform in Oregon. One respondent commented that the interests of certain stakeholders, particularly teachers unions, present “political hurdles.” Key informants also noted the state’s complex school financing formula which, along with strong support for unions, makes the politics of education reform in Oregon especially challenging. External factors that affected Chalkboard’s efforts and results are described below:

- **Chalkboard was not consistently in alignment with traditional education groups.** Key informants across groups noted that prior to 2007, education policy in Oregon had been influenced by four “big players” representing the education establishment: the Oregon Department of Education (ODE), the Oregon School Board Association (OSBA), the Oregon Education Association (OEA) and the Confederation of School Administrators (COSA). Civic engagement partners and education representatives noted these entities tended to “run the show in Salem” and were not advocating for the kinds of reforms that Chalkboard had proposed in late 2006. These powerful interests impacted Chalkboard’s work, especially in the 2007 legislative session. Some education representatives noted that Chalkboard prioritized the issue of differential teacher pay in the 2007 session, an issue that was not supported by the union. Several informants’ comments indicated that other issues may have had greater support from the union. By prioritizing teacher compensation, Chalkboard may have contributed to tensions between itself and education groups (particularly OEA) and may have inhibited education groups’ willingness to align with Chalkboard. In addition, Chalkboard received early support in the session from Republican legislators. According to some informants, this led to perceptions among the education establishment that Chalkboard was representing Republican Party interests. Thus, there was significant push-back on some of Chalkboard’s priorities because of how education groups interpreted Chalkboard’s agenda. Despite these tensions, civic engagement partners and education representatives pointed out that Chalkboard was able to find common ground with education organizations concerning support for teacher mentoring and professional development. As noted previously, Chalkboard adjusted its strategies and tactics to seek greater alignment with the influential education groups and clearly convey its nonpartisanship. The group has

made notable progress aligning with districts and individual members of education organizations as a result, although some tensions still remain at the state level.

■ **Oregon lacks strong political leadership around education reform.**

When asked what other efforts besides Chalkboard’s were being directed at education reform in 2007, one school district representative said: “Nothing of significance. That sounds harsh but it is true.” One civic engagement partner noted the lack of commitment to education reform among the traditional education stakeholders: “(Those organizations are) resistant to change.” In terms of legislative leadership, a civic engagement partner stated, “I don’t know if we have a lot of big picture thinkers in the legislature.” A legislator described cautiousness among peers: “(Oregon legislators) are hesitant to move forward because (previous efforts to address education reform that occurred in Oregon in the early **1990s**). . . really failed in many ways. (Most legislators) are very cautious to make change. I believe that part of the culture (within the legislature) is to keep the status quo.” One civic engagement partner identified Oregon’s state budget pressures as a possible contributor to weak leadership: “There is a leadership vacuum It is hard to be a leader when you are on your knees and continuing to cut and cut.” Lack of political leadership meant challenges. Although Chalkboard had strong research supporting its priorities, the tendency among education and political leaders to defer to the status quo meant that, as one civic engagement partner noted, “(Chalkboard probably won) the policy debate but (lost) the political debate.”

Lack of forceful political leadership regarding education reform continued to be a challenge through 2009. In a 2009 Oregonian opinion piece, Susan Nielson called out this lack of leadership and Oregon’s “ambivalence” towards public education, noting that “the state perennially teeters on the edge of crisis, saving the bare minimum while giving away much of its reserves in tax rebate (“kicker”) checks to middle-class and affluent people Meanwhile, Oregon practically sprints from education reforms that require significant compromise, change or money.”^{xxviii}

- **The economic recession and the resulting state budget pressures created challenges.** Adding to a lack of leadership was the fact that by 2009, as one civic engagement partner noted, “everything had started to collapse (The legislature] was doing emergency measures to try

“There is growing awareness now that the state has to wake up and get to the table on education reform issues.”

— District representative

and solve the current budget while at the same time build the next one.” The economic downturn became a significant factor in Chalkboard’s ability to make gains on its priorities. Data indicated that concerns about employment and the state budget consumed much of the 2009 legislative session, a competing focus that affected the degree of discussion and progress regarding education reform. A state education representative explained, “As the budget environment gets worse (legislators) get less willing to tolerate a new idea. The budget environment (in 2009) hurt a lot.”

Despite challenges, some key informants noted that by late 2009, the landscape for education reform in Oregon had become “more ripe” for change. Data suggest that the “salience of education reform grew” in part due to the issue’s prominence at the federal level. For instance, several informants mentioned Oregon’s low placement

(37th) among states that applied for federal Race to the Top funds as a “wake-up call” to the education establishment and to Oregonians more broadly about the need for reform. As a district representative explained, “There is growing awareness now that the state has to wake up and get to the table on reform issues.” A 2009 editorial affirmed the awakened potential, noting Chalkboard’s leadership on education reform as well as the need for more leadership from elected officials: “Oregon has the potential to regain its educational footing. Several reform-minded lawmakers, an army of parent advocates and a few effective organizations, such as the Chalkboard Project and Stand for Children, can make a world of difference. But Oregon needs more—more from its governor, its Legislature, its education department, its state Board of Education. Otherwise, Oregon will find itself a national player in only one area: Making excuses.”^{xxix} The editorial’s view echoes Chalkboard’s position. Thus, while the state budget and politics of education reform present challenges, new opportunities may emerge as more elected and civic leaders tune in to and support Chalkboard’s efforts.

While the state budget and politics of education reform present challenges, new opportunities may emerge as more elected and civic leaders tune in to and support Chalkboard’s efforts.

Conclusion

The data presented in this brief provide evidence that Chalkboard’s civic engagement efforts, which were directed at education reform in Oregon, contributed to several clear outcomes during the 2007 to 2009 time period.

Together with key partners, Chalkboard implemented effective advocacy with decision-makers and influential leaders which led to achievement of notable policy outcomes, including adoption of Oregon’s teacher mentoring and teacher professional development bills, as well as other decisions reflecting interim progress towards broad education reform.

In addition to policy outcomes, data analysis provided evidence of other important results, including the following:

- **Chalkboard became a strong, credible and well-recognized leader regarding education reform in Oregon.**
- **Chalkboard effectively utilized and continued to strengthen its partnerships and alliances, building complementary relationships that helped to increase awareness and support for Chalkboard’s education reform priorities among civic leaders, citizen groups, education stakeholders and legislators and to achieve key policy outcomes.**
- **Chalkboard’s efforts positively altered both the tone and content of education reform discussions in Oregon at both state and local levels and helped to create a new, more conducive space for dialogue.**

ⁱSee: *A Guide for Evaluation of Advocacy and Policy*. (2007) Organizational Research Services on behalf of the Annie E. Casey Foundation. Available at: www.organizationalresearch.com.

ⁱⁱ Further information about the Chalkboard Project can be found at www.chalkboardproject.org

ⁱⁱⁱ Chalkboard Outcome Map, (1/21/10)

^{iv} Others also use the term “advocacy” for this type of work. For example, the seminal *Evaluation Exchange* issue on advocacy and policy change notes, “Advocacy here represents the strategies devised, actions taken and solutions proposed to inform or influence local, state or federal decision making.” (Volume X11, Number 1, Spring, 2007, p. 1). Innonet’s Point K website defines advocacy as “... ‘a wide range of activities conducted to influence decision makers at various levels.’ This means not only traditional advocacy work like litigation, lobbying, and public education, but also capacity building, network formation, relationship building, communication, organizing, and leadership development.” <http://www.innonet.org/resources/> (retrieved 9_30_10)

^v From Summary of Civic Engagement Feedback – Cross-Section of Oregonians August, 2005. Available:

<http://www.chalkboardproject.org/images/PDF/CivicEngagementAug05.pdf>. And from Chronicle p. 37.

^{vi} 2004 Survey: Davis, Hibbitts & Midghall, Inc. (DHM) surveyed 1,800 Oregonians statewide for the Chalkboard Project. Available:

<http://www.chalkboardproject.org/images/PDF/StatewideSurveyHighlight.pdf>.

^{vii} See Chalkboard presentation:

<http://www.chalkboardproject.org/images/PDF/PublicOpinionSlides.pdf>.

^{viii} The Chalkboard Chronicle. p.39

^{ix} See press release: <http://www.chalkboardproject.org/news/press-releases/2008-05-01.php>. Results available:

<http://www.chalkboardproject.org/images/Oregon%202008%20Teacher%20PD%20Survey%20Report.pdf>.

^x See Chalkboard's website for complete listing of commissioned research and reports:

<http://www.chalkboardproject.org/research-reports/reports.php>.

^{xi} See Chalkboard Press Release: <http://www.chalkboardproject.org/news/press-releases/2007-02-13.php>.

^{xii} See press release: <http://www.chalkboardproject.org/news/press-releases/2006-09-26.php>

^{xiii} See press release: <http://www.chalkboardproject.org/news/press-releases/2008-11-24.php>.

^{xiv} See press release:

http://www.chalkboardproject.org/images/press_releases_pdf/NCTAF_PR_July_09.pdf.

^{xv} See press release:

http://www.chalkboardproject.org/images/press_releases_pdf/May6thConvoPR.pdf.

^{xvi} See press release: <http://www.chalkboardproject.org/news/press-releases/2006-02-17.php>.

^{xvii} More information available at: <http://www.chalkboardproject.org/get-involved/teachers-corps.php>.

^{xviii} See Chalkboard policy update: <http://www.chalkboardproject.org/news/public-policy/feb-2010.php>.

^{xix} <http://www.chalkboardproject.org/news/press-releases/2007-02-13.php>

^{xx} Editorial. (2009) Chalkboard Project Deserves Our Support. *Statesman Journal*. Salem, Oregon. September 8, 2009.

^{xxi} See: *A Guide for Evaluation of Advocacy and Policy*. (2007) Organizational Research Services on behalf of the Annie E. Casey Foundation. Available at:

www.organizationalresearch.com and www.aecf.org

^{xxii} Editorial. (2007). Focus on education. *Newport News Times*. Newport, Oregon. January 17, 2007.

^{xxiii} Buckley, Peter. (2008). Teachers need better professional development. *The Register-Guard*. Eugene, Oregon. March 31, 2010.

^{xxiv} See: *What Makes an Effective Advocacy Organization? A Framework for Determining Advocacy Capacity*. (2009) TCC Group on behalf of the California Endowment.

^{xxv} Press release: <http://www.chalkboardproject.org/news/press-releases/2007-02-02.php>

^{xxvi} See: *What Makes an Effective Advocacy Organization? A Framework for Determining Advocacy Capacity*. (2009) TCC Group on behalf of the California Endowment.

^{xxvii} See: <http://www.nytimes.com/2010/05/23/magazine/23Race-t.html>

^{xxviii} Nielson, Susan. (2009) Ambivalence and Oregon Schools. *The Oregonian*. Portland, Oregon. January 25, 2009.

^{xxix} Editorial. (2009) A Race to the Sidelines. *The Oregonian*. Portland, Oregon. September 1, 2009.

Appendix A

Evaluation Design and Methodology

Evaluation Purpose

Evaluators, in conjunction with Chalkboard staff and board members, developed a series of questions to guide evaluation efforts. Questions were directed at helping evaluators describe and explain the extent to which Chalkboard's civic engagement efforts influenced education reform in Oregon. Overall questions underlying data collection efforts were as follows:

- What were influential factors that contributed to adoption of state level policy changes in 2007 and 2009?
- What were interim signs of progress related to education reform efforts and how did Chalkboard's civic engagement efforts (including those associated with Chalkboard's CLASS project) influence or contribute to progress?
- In what ways did Chalkboard's initial civic engagement efforts with Oregon citizens contribute to policy changes and other outcomes?
- What were other factors that facilitated and/or challenged Chalkboard's civic engagement efforts or results (e.g., external context)?

Evaluation Methodology and Data Collection Methods

To address these questions and evaluate Chalkboard's past civic engagement efforts, ORS implemented a non-experimental design using mixed qualitative methods. Qualitative methods are common to many advocacy evaluation efforts because they allow for collection of rich data and are highly adaptable and nimble. Evaluators used the following qualitative data collection methods:

- Document Review. Evaluators reviewed background materials, including bi-monthly Operations Reports reflecting the 2007-2009 time period, *The Chalkboard Chronicle* (which documented Chalkboard's creation and efforts from 2003 to 2006), press releases and media coverage, archives available on Chalkboard's website, and other relevant internal documents; and
- Key informant interviews. Evaluators conducted 31 key informant interviews in two phases. The first phase consisted of five interviews with Chalkboard staff and civic engagement partners to help refine questions and focus data collection efforts. The ORS team then created protocols for a second phase of interviews and, via consultation with Chalkboard staff, a list of 58 individuals that included those with the following role or relationship to Chalkboard: current and former staff; civic engagement partners; board members; members of the Oregon state legislature; and representatives of the local, state and national educational sectors. Evaluators attempted to achieve a representative sample of informants

from all of these stakeholder groups. Within the stakeholder categories, evaluators used convenience sampling methods to complete informant interviews. Interviews ranged in length from 20 to 60 minutes. All informants were offered confidentiality.

Considerations Regarding Evaluation Methodology and Data Collection Methods

Evaluation of civic engagement and advocacy represents a relatively new area of evaluation, a “new frontier” for this field of research.⁶ As funders and nonprofits have increasingly recognized the potential of civic engagement and advocacy efforts to further their broad social change goals, a corresponding interest has grown in how to evaluate such efforts. Over the past five years, leading philanthropic organizations have supported the development of tools and approaches to measure impacts in these areas.⁷

In some ways, evaluation of civic engagement and advocacy efforts is similar to evaluation of other types of programs or services. For example, advocacy evaluation relies on systematic and data-based inquiries which may be implemented using traditional quantitative or qualitative methods. However, in other ways advocacy evaluation approaches differ from those relevant to other types of programs and services. Differences reflect the fact that civic engagement and advocacy occur in a dynamic environment that involves many unpredictable variables; civic engagement and advocacy strategies often evolve during the course of the evaluation. In addition, the types of interim changes associated with civic engagement and advocacy that occur “on the way” to longer-term policy or social change goals may be difficult to quantify (e.g., changes in social norms or civic dialogue) and certainly difficult to attribute to discrete efforts. Some evaluators have likened the complexity associated with evaluation of civic engagement and advocacy to assessing the outcomes associated with successfully raising a child (as opposed to assessing the outcomes associated with successfully following a recipe).⁸ In addition, another important aspect is the orientation towards evaluation of civic engagement and advocacy as a vehicle for strategic learning. That is, while data can help document and examine past results, it is also valuable to use data to understand how civic engagement and advocacy strategies *are contributing to desired longer-term outcomes*. It is fair to say that because the field is still emerging, approaches are still being developed and tested and lessons synthesized.

Since civic engagement and advocacy occur in dynamic and uncontrollable environments, non-experimental evaluation designs are often considered the most appropriate means of capturing progress

⁶ For example, “*Advocacy and Policy Change*” was the focus of the Spring 2007 *Evaluation Exchange of the Harvard Family Research Project*; and the American Evaluation Association established a topical interest group on advocacy and policy change in 2008. Evaluation groups such as *Organizational Research Services*, the *Center for Evaluation Innovation*, and *The Innovation Network* (which maintains a repository of advocacy evaluation articles on its “Point K” website) have focused attention on the emerging area of measuring advocacy and civic engagement.

⁷ For example, see: *A Guide for Evaluation of Advocacy and Policy*. (2007) Organizational Research Services on behalf of the Annie E. Casey Foundation, p.1 . Available at: www.organizationalresearch.com

⁸ Westley, Francis; Zimmerman, Brenda; and Patton, Michael Quinn. (2006). *Getting to Maybe: How the World is Changed*. Random House Canada.

towards key outcomes. To ensure rigor, evaluators identified three approaches to promote validity and reliability of data.⁹ These included the following:

- Use of mixed qualitative methods. Evaluation drew on both secondary data (background documents and materials, media, historical/chronological documentation) and primary data (key informant interviews). Document and media review uncovered relevant facts and context regarding Chalkboard’s efforts and influence. Interviews offered rich data and a broad set of perspectives about questions of interest. Evaluators determined that the combination of facts and rich data about evaluation questions would yield important themes and elicit a fuller picture regarding Chalkboard’s areas of interest than would likely have emerged through other methods, such as surveys or polling.
- Overlapping protocol. The interview protocol was uniquely tailored for each stakeholder group (e.g. legislators, civic engagement partners, board members), but evaluators made sure that each question was addressed by more than one key informant group. This helped ensure validity by allowing for response comparisons among those with different roles and relationships to Chalkboard.
- Expert review. Evaluators obtained an external review of the evaluation design and findings.¹⁰

Again, owing to the complex and dynamic nature of civic engagement and advocacy campaigns, key informant interviews followed a semi-structured, naturalistic inquiry approach. This allowed evaluators to capture systematic data from all informants while also digging deeper into areas of interest within each interview. In addition, for evaluation of advocacy effort it is sometimes necessary to adapt interview protocol as early data collection or other contextual variables can reveal important areas for inquiry that were initially unpredicted. In this case, evaluators based key informant interviews on specific protocol but original questions were adjusted slightly in response to emergent data.

While quantitative data analysis is often directed at identifying majority responses, qualitative data analysis yielded themes that reflect the following: (1) the consensus of multiple informants and sources or (2) unique perspectives that the evaluators thought important to note. While it can be useful to identify common themes or widely held views (as would typically be the case with quantitative data analysis), using qualitative analysis to examine unique responses also provided important and meaningful insights.

A caveat is worth noting. Qualitative data and a relatively small key informant sample mean that findings should not be, nor were they intended to be, generalized. For example, from the data collected, evaluators cannot definitively identify factors that most strongly influenced *all* Oregon legislators in their decision to fund Chalkboard’s teacher mentoring bill. Further, the perspectives of those with a

⁹ As noted in Coffman J. *Advocacy Evaluation: Trends and Practical Advice* (2007), in the case of advocacy evaluation, “rigor is appropriately defined as achieving clarity and consensus about the evaluation’s outcomes and indicators, and the ways in which the evaluation will ensure it produces credible and defensible findings.”

¹⁰ Julia Coffman served as the reviewer. Julia is an evaluation consultant with 17 years of experience in the evaluation field. Julia is the Director of the Center for Evaluation Innovation, a nonprofit effort that was founded to build the field of evaluation in hard-to-measure areas, including advocacy and public policy (as well as civic engagement), and has worked since 1996 with the Harvard Family Research Project at the Harvard Graduate School of Education.

certain role or relationship to Chalkboard cannot be generalized to others with the same role or relationship. Another consideration is that the findings reflect informants' best recollections about a certain point in time.

The spectrum of interviews and secondary data sources, as well as data collected as part of a prospective evaluation for Chalkboard, provided opportunities for triangulation (corroboration) and a definitive picture of Chalkboard's efforts and results. Evaluators have strong confidence in the quality of the data and validity of findings.

Appendix B

Key Informants

Staff

- **Aimee Craig**, Communications Manager, the Chalkboard Project
- **Sue Hildick**, President, the Chalkboard Project
- **Shirley Skidmore**, Communications Director (former), the Chalkboard Project
- **Kate Dickson**, Vice President of Education Policy, the Chalkboard Project

Consultants and Advocacy Partners

- **Eduardo Angulo**, Chairman & Executive Director, Salem/Keizer Coalition for Equality
- **Ryan Deckert**, President, Oregon Business Association (OBA)
- **Dana Hepper**, Advocacy Director, Oregon Stand for Children (Stand)
- **Cindy Robert**, Lobbyist, Rainmakers LLC
- **Deborah Sommer**, Superintendent (former), Canby School District / CLASS Coach, the Chalkboard Project; Chalkboard Advisory Council
- **Sarah Stephan**, Portland Managing Director, Pyramid Communications
- **John Tapogna**, President, ECONorthwest
- **Chip Terhune**, Chief of Staff (former), Governor Ted Kulongoski

FBO Board Members

- **Greg Chaillé**, President, Oregon Community Foundation
- **Bill Early**, Trustee, JELD-WEN Foundation
- **Jerry Hudson**, Trustee, Collins Foundation
- **Bob Kingzett**, Executive Director, JELD-WEN Foundation
- **Norm Smith**, CEO, Ford Family Foundation

Legislators

- **Peter Buckley**, Oregon Representative, House Education Committee Chair (2007); Joint Ways & Means Committee Chair (2009)
- **Betty Komp**, Oregon Representative, House Education Committee Member (2007); Ways & Means Education Subcommittee co-Chair (2009)
- **Karen Minnis**, Oregon Representative (former)
- **Frank Morse**, Oregon Senator, Senate Education Policy Committee Member (2007-2009)

Education Representatives – District-level

- **Jerry Colonna**, Superintendent, Beaverton School District; Chalkboard Advisory Council
- **Vicki Fleming**, Superintendent, Redmond School District; Chalkboard Advisory Council
- **Dan Jamison**, Superintendent, Sherwood School District; Chalkboard Advisory Council
- **Todd Jones**, Teacher, West Linn High School; Chalkboard Advisory Council
- **Ford Morishita**, Teacher, Clackamas School District; Chalkboard Advisory Council
- **Randy Schild**, Superintendent, Tillamook School District

Education Representatives—State and National level

- **Ed Dennis**, Deputy Superintendent, Oregon Department of Education (ODE); Chalkboard Advisory Council
- **Jill Powers Kirk**, Vice President, Oregon Business Council (OBC)
- **Gail Rasmussen**, President, Oregon Education Association (OEA)
- **Karen Smith**, Chief Operating Officer, National Commission on Teaching and America’s Future (NCTAF)

