the SCHOOLS AND COMMUNITIES ORGANIZING FOR RACIAL EQUITY toolkit

INTRODUCTION

The Schools and Communities Organizing for Racial Equity (SCORE) project launched in Providence, Rhode Island in 2021. SCORE is a collaborative, action-oriented research project that brings together an intergenerational Community Research Team (CRT) of youth and parent leaders. With support from university- and/or community-based partner organizations, this team:

- Conducts community research;
- Identifies community priorities for educational and racial equity;
- Identifies indicators to measure progress on these priorities; and
- Develops a tool or "SCOREcard" that presents the community priority areas, identified indicators and related data, and ultimately assesses a school district on measures of educational and racial equity that the community identifies as important.

Project staff members have designed this SCORE Toolkit to support communities in planning and conducting their own SCORE projects, and it includes tools, resources, and lessons learned from the Providence pilot.

Purpose of SCORE

SCORE represents an effort to:

- **Measure what matters** to students and families of color, students and families experiencing economic hardship, and others most directly impacted by inequities;
- Help school districts understand, be responsive to, and be held accountable to **community priorities for educational and racial equity**;
- **Share school district progress** on community priorities with youth, parents, and other community members; and
- Give youth, parents, and community information they need to **advocate or organize for equity-centered change** in schools and school districts.

Measures of school accountability, including those that include equity as a guiding objective and framework, have traditionally been determined by top-down processes that privilege perspectives distant from the lived experience of students and parents. As a result, accountability for school improvement and success often relies on oversimplified indicators, such as standardized tests, that leave out the perspectives, priorities, and expertise of youth, parents, and community members, or even harm them. Furthermore, too many of these metrics measure outcomes at the individual level, and overlook the ways in which the policies and practices in education systems create or contribute to race- and class-based inequities. Standards-based accountability, in particular, has contributed to the deficit positioning of students of color, narrowed curriculum, and brought sanctions, including school closure, to communities[1].

SCORE seeks not only to support but also to transform district and school improvement via community-driven accountability and parent and student leadership. Parent and student leaders' ideas, wisdom, and visions for educational and racial equity are starting points and driving forces of SCORE.

[1] Oliva, M. and Martinez, M. (2021). What were the Unintended Consequences of SBR Particularly on Students of Color? Standards-Based Reform Evidence Synthesis Series, RQ2. EduDream. Chicago, IL.

Why Indicators?

The SCORE project is centered around the development and implementation of educational equity indicators -- data and statistics that describe key aspects of schooling, and which help to monitor and evaluate schools, programs, educators, and students. This core design characteristic is linked to the project's goals, perspectives, and theory of action, which reframes accountability so that young people and families are positioned to hold schools and systems accountable. This is a fundamental shift in the historic dynamic between school systems, communities, and reform initiatives. Its goal is to position communities with the power to make decisions about schools and to demand that school systems meet their standards for educational equity. Community-developed indicators facilitate these shifts in power and provide a foundation for sustainable community activism, advocacy, and organizing.

As members of our Community Research Team have noted, indicators show both desires and outcomes, and where progress is or isn't being made over time. When youth, families, and communities are given not only data but the tools to understand it, they build a form of power -- information that supports the ability to advocate for the changes they want to see in their school system. When communities develop indicators in the areas of educational equity that are important to them, they are asserting that it is the responsibility of the school system and policy leaders to meet their standards. When they have access to and monitor data in these areas, they have the information needed to hold school systems accountable to their priorities.

SCORE Partners

The following partners play a role in the SCORE process. For organizational partners in particular, alignment with the core values and commitments listed below is crucial.

- **Community Research Team (CRT)**: This is the group of students and parents/family members (typically 8-10 total) who are part of the school or district community, and whose interests, needs, ideas, and priorities drive the project. They are deeply engaged in all aspects of the SCORE process, and receive stipends for their work. Community Research Team membership should prioritize those students and families most directly impacted by inequities, such as students and families of color, those who experience economic hardship, multilingual learners, immigrant families, and students with disabilities and their families.
- **University- or Community-Based Partner Organizations**: One or more organizations provides training, support, guidance, and resources for the Community Research Team and their work. Capacities needed to support a SCORE project include: logistical management, planning, facilitation, and training/support on the research and indicator development processes. Grassroots community-based organizations in particular may lead advocacy and organizing around the use and adoption of SCORE indicators.
- **School or School District**: Ideally, schools or school districts are willing partners in a SCORE process -- valuing the wisdom and work of the Community Research Team, being responsive to the educational and racial equity priorities of the community, and ultimately adopting the set of indicators generated from the project. However, contexts differ greatly, and this may not always be realistic or possible. In such cases, advocacy and organizing efforts may be directed at the school system to encourage or demand their attention to and adoption of SCORE indicators.
- **Funders**: Values-aligned funders support a SCORE process by providing the resources necessary to carry out the process. It is also possible for school districts to invest resources in SCORE as a strategic improvement initiative.

Values & Commitments

Values and Commitments

We have found that a set of interrelated values and commitments are necessary to do the work of SCORE well. These are values also found in Critical Participatory Action Research (CPAR) and community organizing, both of which have influenced the SCORE approach.

- **Community Voice and Agency:** At the heart of SCORE is the belief that the perspectives and experiences of people most affected by social injustice must be at the center of finding and implementing solutions. In education, the people most affected by inequity and injustice are youth and families (particularly those who are low-income and of color) and educators. Centering the voices of youth and families in defining educational equity priorities is most likely to result in the educational changes communities want and need. This belief must be recognized and respected by research partners, school system partners, and funders, whose positional power too often drives agendas and decisions.
- **Relationships:** The SCORE process is rooted in relationship-building, which provides a critical foundation for the collaborative, intensive work of research, analysis, and indicator development that lies ahead. The ongoing relationships and trust cultivated between the youth and families on the Community Research Team, the Community Research Team and partner organization staff/facilitators, and ideally with school/district leaders who support the SCORE process and adopt the resulting indicators, are critical for the project to move forward and be successful.
- **Redefining Expertise:** Too often, research is done to, rather than with, communities, and lived experience is not held in the same regard as professional or academic knowledge. SCORE requires a conviction that community members are expert problem-solvers, uniquely positioned to articulate the educational experiences, needs, and dreams of the community. Staff/facilitators from university- and/or community-based partner organizations bring guidance, tools, and support to the process, but must have the humility to recognize the leadership of students and families and ensure that their expertise, vision, and ideas guide the project and its outcomes.
- **Leadership Development and Support:** Community Research Team members will likely bring different levels of understanding and experience with research. Staff facilitators should build shared understanding and comfort with research tools and processes across the Community Research Team. This may necessitate one-to-one check-ins and/or working sessions as needed. Individualized support can go far in ensuring that all members of the Community Research Team can fully engage, feel ownership of the SCORE process and outcomes, and are adequately prepared to talk about it with others, including decision-makers.
- **Accessibility:** Both research and school accountability measures can be alienating to youth and parents. Technical language and jargon, complicated data sets with non-intuitive navigation, and lack of resources in languages other than English can all serve to send a message that this is not for you, even when resources are publicly available. SCORE strives to make research and accountability concepts and products accessible and relevant to a broad community audience.
- **Action and Impact:** While the experience of Community Research Team members is critically important to the SCORE process, SCORE is intended to have a lasting impact beyond the Community Research Team's involvement. Cultivating connections with the broader community and in particular with those youth, families, and educators who are advocating and organizing for educational and racial equity can help to ensure that SCORE is more than a one-off project.
- **Justice and Liberation:** We believe that education should equip communities to recognize and challenge injustice and oppression, and use their collective power and creativity to build a world that is equitable and just.

The SCORE Process

The SCORE Process

This outline shows the “typical” phases of a SCORE project, however this can be modified to meet a community’s needs and context, and to take into account any existing work (research, advocacy, issue prioritization) that has already occurred. The resources in this toolkit are organized by these phases, which are connected to and build upon one another. The timeline for this process is context-dependent. In the SCORE pilot, the Community Research Team met biweekly for 10 months for Phases 1-4 listed below, and four SCORE Fellows were recruited to continue work on Phase 5 (Implementation). However, this can be modified to fit your own timeline parameters and possibilities.

Preparation
Prior to a project launch, preparation for SCORE entails solidifying partnerships, recruiting Community Research Team members, project planning, and handling logistics.

Phase 1
Relationship/Team Building, Storytelling, and Issue Identification: Focuses on building relationships, trust, and understanding between Community Research Team members and with staff/facilitators, and includes identifying issues or focus areas for the SCORE project via shared stories around educational experiences and visions.

Phase 2
Research Preparation and Design: Focuses on preparing for research by working with Community Research Team members to identify root causes of problems they’re seeing in their school district, understand research ethics, develop research questions, and learn research methods.

Phase 3
Data Collection: Focuses on designing research instruments (such as surveys and interview protocols) and collecting data through the methods identified in the design phase.

Phase 4
Data Analysis and Indicator Development: Data Analysis and Indicator Development: Focuses on using research findings to develop indicators, and planning for how to present those indicators and related data to a wider audience.

Phase 5
Implementation: Focuses on planning, strategizing for, and conducting outreach with various stakeholders who may be able to adopt, advocate for, or use information from the SCOREcard/ indicators.

Using the SCORE Toolkit

Using the SCORE Toolkit

The pilot SCORE project took place during the midpoint of the COVID-19 pandemic. Given health and safety considerations, the entire project was conducted virtually, using Zoom for meetings. The tools and activities in this toolkit are thus presented with instructions for virtual implementation, and Appendix A gives an overview of virtual resources that we found helpful. However, if you are holding in-person meetings, there are relatively simple modifications that can be made – for example, using chart paper and post-its rather than an online collaboration tool such as Jamboard for activities where participants contribute individually and then view one anothers' responses, or spreading discussion pairs throughout a room instead of using Zoom breakout rooms.

Our meeting schedule was shaped in part by our virtual format. Knowing the difficulties of sustaining engagement virtually for long periods, meetings were held biweekly and were usually 90 minutes long with a 5-10 minute break at the midpoint. Depending on your context, meeting lengths and frequency, as well as your overall timeline, may vary. We thus present our tools as a menu of options that you can adapt for your own context. The tools are organized by project phase and broken down into roughly sequential sections within those phases. Recommended length for each activity is included so that you can build customized meeting agendas that are suitable for your needs and preferences.

An early lesson we learned in the SCORE pilot was that although it may be tempting to pack an agenda with activities and get through more content in your meeting, rushing often shortchanges individual activities and undermines the group's overall work. Having fewer activities per meeting will give ample time for richer discussions, unanticipated hiccups (such as late arrivals, interruptions, and technology challenges), and for activities to "breathe."

Additional lessons learned are embedded within individual tools, most often in sections under the header, "A Note About..." These represent reflections on the challenges and obstacles we faced during the pilot SCORE process, with guidance on how you might navigate them.

Given the high percentage of Spanish-speaking students and families in Providence, it was important to us that the SCORE pilot be a fully bilingual project. To continue honoring that commitment, we have developed a Spanish version of this toolkit, which can be found here. Because of this commitment to a bilingual project, you will find that many of our slide decks and resources include both English and Spanish. These can be easily modified for a monolingual audience. Considerations for running a multilingual SCORE project, as well as other aspects related to planning, can be found in the **Preparation Phase: Questions and Considerations** tool.

Influences and Inspiration

We are grateful to have learned from and, in some cases adapted, resources from existing toolkits and organizations focused on participatory action research, community-building, and facilitation. Links and/or citations are included in individual tools where adaptations have occurred or resources have been embedded.

Acknowledgments

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SCORE would not exist without the nine members of our **Providence Community Research Team**, whose wisdom, dedication, leadership, passion, and hard work were not only a source of inspiration for project staff, but also motivated us to reflect upon and refine the SCORE process and the resources within this toolkit. We are honored to have worked beside and learned from you.

The Providence SCORE Community Research Team is:
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The **Center for Youth & Community Leadership (CYCLE) at Roger Williams University** partners with youth, families, educators, and other stakeholders to build collective power and fight for educational justice. More information can be found at **https://cycle-rwu.org/**.

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The mission of the **Social Policy Hub for Equity Research in Education (SPHERE)** is to engage Rhode Island College students and faculty, in partnership with Rhode Island community members, in conducting and disseminating research for equitable educational and social policies. SPHERE endeavors to help community members understand, and become more involved in education policy decisions. More information can be found at **https://www.ric.edu/department-directory/social-policy-hub-equity-research-education.**

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Related Resources

The Providence SCOREcard is in development, and set to be released soon. If you would like to receive notification when the SCOREcard is live, please sign up for updates here: **cycle_score@rwu.edu**

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PREPARATION PHASE

Questions and Considerations

Prior to beginning your SCORE project, there are a number of planning considerations and decisions to be made. The questions and checklists in this tool will help you to assess important capacity and budget considerations, and to address planning needs from establishing productive partnerships, to naming barriers to community participation, to selecting Community Research Team (CRT) members. Topics addressed include:

Establishing Partner Roles and Responsibilities

The following set of questions is designed to name the partners involved in your SCORE project, map out the roles each is taking on, and build team structures for communication and planning.

1) Who are the partners involved in your SCORE project? What kinds of organizations do they represent? (community-based organizations, university researchers, school district staff, others)
2) If you have community-based organization partners, do they truly represent or work with community members who are most impacted by educational problems and inequities? Are they grassroots organizations who work or engage directly with students, families, or other community members who are part of your school system? Or are they "grasstops" organizations, comprised mainly of professional staff, "experts," or others who have positional or relational influence?
3) What strengths does each partner bring to the project? Where might each partner organization take a lead or supporting role?
4) Is a formal contract or memorandum of understanding between partners needed or wanted?
5) Who will be the specific staff on the SCORE project? How much of their time is allocated to SCORE? What are their specific roles?
6) If there are multiple partners, what portion of the budget will be allocated to each organization?
7) When and how often are team meetings needed? How much time is needed for ample internal learning, planning, and reflection?
8) How will partners develop a shared understanding of workflow for the project? How will disagreements be handled?
9) If your SCORE project needs to be approved by an Institutional Review Board (IRB), who will be the IRB lead? What will the IRB process entail?

Language Justice

The following set of questions is designed to help you assess whether you have the need, capacity, and budget to have a bilingual or multilingual Community Research Team for your SCORE project. The goal of any multilingual project should be to ensure that the project is fully accessible to CRT members who may not be fluent in the language staff speak, so it will be important to understand these factors prior to deciding if you're recruiting participants who do not speak the dominant language.

1) What are the most prominent languages spoken in your school district or community?
2) What is the percentage of multilingual learners or non-dominant language speakers/families in your school district and/or community? Are the perspectives of these students and families important for you to have as part of your Community Research Team, and overall SCORE project?
3) What companies or individuals provide language interpretation and translation services in your community? How much do interpretation and translation services cost?
4) Do you have multilingual staff involved in the SCORE project? Can or should they take on roles interpreting, translating, or facilitating in languages other than those spoken by the majority of the staff?
5) Given responses to the items above, what budget is needed to make the SCORE project fully accessible to bilingual or multilingual students and families? How does this compare to the budget you have for the project? Which/how many languages can you accommodate?
6) If you are unable to have a multilingual Community Research Team, what are other ways that you could bring in the perspectives of multilingual learners or students and families speaking other languages elsewhere in the SCORE project? What capacities or resources will be needed?

If you are able to run a bilingual or multilingual SCORE project, consider how you're addressing the following items in planning, Community Research Team recruitment, and implementation.

1) Building in time at all stages for translation of all materials (including recruitment materials, CRT meeting materials such as presentations or worksheets, and resources for independent reading or work).
2) Consider the timing implications of running multilingual meetings - when interpretation is factored in, things typically take longer.
3) Having capacity within CRT meetings to translate any live notes or participant contributions to collaborative platforms/tools.
4) Booking or assigning simultaneous interpreters for CRT meetings, and sharing meeting materials with interpreters in advance.
5) Understanding and testing how interpretation will work in the format you're using. If you are running virtual meetings through Zoom, you will need a paid account. Details and additional setup information can be found on the Zoom website. Additionally, Zoom interpretation may not be compatible with Chromebooks or mobile devices, so you will need to check the technology being used by both staff and CRT members in advance.

Forecasting and Addressing Barriers to Participation

SCORE can be a significant commitment for parents and youth who already lead busy lives, and will likely be coming from differing circumstances. Having a plan to determine and address potential barriers will help to ensure that all CRT members can participate actively. Solutions to address these barriers often have budget implications, so it's important to think ahead about the costs associated with these elements both in a financial sense and in terms of capacity. In addition to the list below, there may be additional barriers that you may not anticipate or cannot predict. Maintaining open lines of communication, including building in regular one-on-one check-ins with CRT members, will be critical to addressing any needs that arise.

Stipends:

CRT members should be compensated for the work and effort they're putting in for SCORE, and stipends can also offer incentives for participation. Questions to consider include:

1) What budget do you have available for CRT stipends?
2) How many hours per month do you anticipate CRT members will spend on SCORE? What level of stipend compensation is appropriate for the anticipated time and effort?
3) Will parents and youth receive the same stipends, or different amounts?
4) How often will stipend payments be released (for example, monthly, quarterly, twice in the project)?
5) What is your organization's process for disbursing stipends? In what ways will stipends be disbursed (checks/direct deposit, gift cards, etc.)? What paperwork might be needed (scope of work, contract, W-9 forms)?

Technology:

If you're conducting SCORE virtually, or if you expect CRT members to complete independent computer-based work between meetings, CRT members will need reliable access to technology.

1) Laptops: Do you have or can you purchase loaner laptops or Chromebooks for CRT members who need them? How much will you need to budget for this? When and how will you determine which CRT members need them?
2) Wi-Fi: Is a reliable internet connection necessary for your project? Do you have or can you purchase Wi-Fi hotspots to loan CRT members who need them? How much will you need to budget for this expense? When and how will you determine which members need them?
3) Virtual meeting tools: If your SCORE CRT will be meeting virtually, what tools will you need? A virtual meeting platform (such as Zoom or Google Meet)? Collaborative whiteboard platforms (such as Mural, Miro, or Jamboard)? Others? What are the cost implications associated with each?
4) How often will stipend payments be released (for example, monthly, quarterly, twice in the project)?
5) What is your organization's process for disbursing stipends? In what ways will stipends be disbursed (checks/direct deposit, gift cards, etc.) What paperwork might be needed (scope of work, contract, W-9 forms)?

Schedule:

Given work, family, and school/after-school commitments, meeting with parents and youth often requires scheduling time outside the typical (9:00 a.m. - 5:00 p.m. Monday - Friday) workday. To ensure that CRT members can participate, scheduling should only be done when their preferences and availability are known. Additionally, required meetings should be scheduled as predictably and far in advance as possible so that CRT members can make any necessary preparations to be able to participate.

In-Person Meeting Considerations:

If you anticipate having in-person meetings, determine whether you will need the following to enable CRT members to participate, and the cost associated with each.

1) Meeting space:
   - Conveniently located
   - Physical accessibility (elevators, ramps, etc.)
2) Transportation
3) Food
4) Child care

Community Research Team Outreach, Selection, and Recruitment

The nature of your outreach and recruitment process for the SCORE Community Research Team will depend on your context. You may have an already established group of parents and/or youth who will become your Community Research Team, or you may opt to have a wider, open recruitment and/or application process. The checklist below includes steps that are suitable for carrying out an open recruitment and/or application process, however several of these elements are also useful if a CRT is coming from an established group.

Note: The nature of your selection and recruitment process may also dictate to some extent the specifics of your SCORE process, including the focus of your research and indicator development in subsequent phases. For example, if your CRT is drawn from an established group of parents and youth, such as those who might be affiliated with a particular grassroots community-based organization, they may already have existing issue areas of interest or even pre-existing research. If you have a more open application and/or recruitment process with unaffiliated parents and youth, you will likely use a process to identify issue areas of interest that starts with a broad exploration of educational equity and experience.

Area	Specific Task	Open Application Processs	Established Group
Outreach and Recruitment	Develop informational/recruitment materials, such as: • Recruitment flyer* • Information/FAQ document*	X	X
	Develop application questions*; create application (online or paper)	X	
	Determine deadline for application submission	X	
	Build webpage with easy access to SCORE info and/or application link	X	X
	Develop outreach list (youth/parent organizations, district/school contacts, partner organizations) for sharing recruitment/application materials	X	
	Hold information session(s) where interested parents/youth can get more details and ask questions	X	X
CRT Selection Process	Determine who is reviewing applications and making final selections	X	
	Develop selection criteria* or scoring rubric; include both individual and cohort considerations	X	
	Determine if you will conduct follow-up interviews with applicants or a subset of finalists. If yes: • Develop interview protocol* • Schedule interviews • Create a system for taking/storing interview notes *Note: If interviews are not conducted as part of the selection process, or if you have an established group, conducting informal interviews with CRT members prior to the start of the SCORE project can establish a connection, help get to know them, understand any barriers to participation and supports needed, and hear and respond to their questions.*	X	X
	Final selection of CRT members and notify applicants	X	

*Example documents available in “Related Resources” below

A Note About the Institutional Review Board Process

Institutional Review Boards (IRB) are committees, usually based at colleges/universities and potentially at school districts, that review proposed research projects to ensure that research methods are ethical and that the rights of "human subjects," or the people involved in the research project, are protected. If your SCORE partnership involves university researchers or school district personnel, you may have to get approval from the IRB before beginning any outreach or recruitment for your project. This would include a review of any survey or interview questions and potentially outreach materials (such as flyers or information sheets) themselves.

If IRB approval is required for any of the SCORE partner organizations, you will likely have to go through a process called "informed consent" in which community participants are given information about the project and its risks and benefits, and asked to give an official consent to participate. If you are working with students under 18, informed consent will be needed from their parents or guardians. Depending on your IRB, parental permission may be needed before minors can even submit an application. If your organization, or one of the organizations in your SCORE partnership, requires IRB approval, reach out to the IRB chair early to understand what is needed and the IRB process and timeline, and be sure to build in ample time for preparing the necessary proposal and receiving approval.

A Note About Multilingual Access

Multilingual access is something we prioritized throughout SCORE as language justice was a core value for the project. Oftentimes, the voices of those who do not speak English or are not fluent in it are excluded from conversations around equity, even when those conversations deal directly with the issues non-English speaking families face. We did not want to replicate the same harm that this causes many of our community members. Because of this, and given the demographic makeup of our inaugural SCORE site, the inclusion of and accessibility for Spanish speaking members of our community was paramount, and enabled our CRT to more accurately represent the students and families in the school district. Having a multilingual project allowed us to include these unique perspectives of parents and students who must navigate an education system that is often not built from them, and ultimately created a richer and more powerful project.

It is also important to note, however, that conducting a fully bilingual or multilingual project necessitates a degree of capacity and budgetary implications that not every group will be able to meet. Interpretation and translation, if coming from outside the team, are expensive. Even if these are things you are able to do internally, they take a lot of staff capacity to do well. Keep in mind that even if you do not have the budget or capacity to have a fully multilingual project, there are still actions you can take to help your project connect with folks who are not fluent in English. Things like the translation of documents and deliverables, or interpretation for community meetings (even if you cannot have interpretation at every internal meeting), can help make that connection.

Related Resources

- **Sample recruitment flyer**
- **Sample information/frequently asked questions document**
  See the FAQ document on the next page
- **Sample student application questionnaire**
- **Sample student selection process and criteria**
- **Sample interview protocol**

Sample SCORE Project FAQ

What Is the SCORE Project?
SCORE is a 10-month (DATE - DATE) collaborative, action-oriented research project that will bring together an intergenerational community design team consisting of 1) five youth currently attending [school district and/or organization] ; and 2) five parent leaders from [school district and/or organization. . With support from partner organizations, this team will develop a tool or "SCOREcard" that will assess [school district] on indicators of equity that the community identifies as important.

What Is the Overall Goal of the SCORE Project?
Too often, accountability for school improvement and success relies on oversimplified measures, such as standardized tests, that leave out the important perspectives and expertise of youth, parents, and community members. Students of color and students in families experiencing economic hardship in [state] have a very different experience in public school than their white, middle- and upper-class peers. In the time of the coronavirus pandemic, inequities are becoming even more apparent. This project seeks to shift the lines of accountability for school improvement so that they are community-driven, collaborative, and equity-oriented, and so that [school district] can understand and be responsive to the educational priorities that are important to youth and families.

Who Is Supporting the SCORE Project?
Researchers from [partner organizations] will partner with and support the team of parent and youth leaders in the project overall. Include partner organization mission statements and/or other relevant information.

How Much Time Will Community Design Team Members Spend on the Project?
The project will take place over a 10-month period between Date - Date. On average, we estimate that community design team members will spend about 3-4 hours a week on the project. Project activities will include [detail on meeting frequency, duration, and format]. . Community design team members will also do follow-up activities on their own between meetings.

What Will Community Design Team Members Do, and How Will They Be Compensated?
Community Design Team members will: Share their knowledge about and experiences with the [school district] , as well as their visions for change; Learn ways to conduct research in their own communities to better understand the experiences, needs, and visions for change of other parents and youth; Review and analyze existing data to better understand the realities and inequities of the educational system; and Decide which indicators of educational equity are most important to measure in the [school district] , and make recommendations for how to do so. Parent members will receive a [amount] stipend, and youth members will receive a [amount] stipend to recognize their time and effort. Stipends will be paid in [number] installments.

Who Is Eligible, and How Can I Apply?
If you are a current high school student in the [school district] who speaks English and/or Spanish, and can commit 3-4 hours a week to the project through [end date], you are eligible to apply! Our application process will have two phases.

> Phase 1: We'll ask you to share basic contact information for you and your parent/guardian. We will reach out to your parent/guardian via telephone to get verbal permission for you to apply to this project. The form for Phase 1 of the application can be found at [web page] and is due by [Date].
>
> Phase 2: Once we have your parent/guardian's permission, we will email you a link to an application form with more questions. This application form is due by [Date]

Who Do I Talk to if I Have Questions?
We are happy to talk if you have questions! Please reach out to [name, role, organization] , at [email and/or phone].

Key Terms

- Indicators: Educational indicators are data and statistics that describe key aspects of schooling, and which help to monitor and evaluate schools, programs, educators, and students. (Definition from International Encyclopedia of Education)
- Accountability: Accountability refers to how students, educators, schools, and districts are held responsible for achieving certain goals. Accountability systems may include incentives to encourage achievement, and consequences for failing to meet certain expectations. (Definition from the SPHERE 2020 RI Education Policy Primer)
- Equity: Equity means that all groups have access to the resources and opportunities necessary to improve the quality of their lives. It also means that differences in life outcomes cannot be predicted on the basis of race, class, or other dimensions of identity. (Definition from Interaction Institute for Social Change)

PHASE I

Relationship Building, Storytelling, & Issue Identification

In collaborative work, building relationships, trust, and understanding is essential, particularly when participants may come from different backgrounds, identities, and positions of privilege or power. For SCORE, investing in relationship building early, as well as throughout the duration of the Community Research Team's time together, provides the necessary groundwork for members to share their own experiences with schooling, advocate for their own needs and interests, and actively contribute to issue identification, research design, and indicator development. This phase includes four groupings of tools and activities representative of a progressive approach to developing trust and sharing experiences.

Building Shared Understanding and Common Language: The tools in this section are designed to ensure a collective baseline understanding of fundamental project goals, logistics, and terms.

Developing Relationships: The initial relationship-building activities in this section are designed to help the parent and youth members of the Community Research Team get to know each other and project facilitators, and become comfortable sharing with the group in relatively low-stakes ways. Activities then progress to sharing stories more directly related to the goals of the project, including Community Research Team members' motivations and hopes, and to how elements of identity impact their educational experiences. Tools to promote relationship-building throughout the project are also included.

Power Dynamics and Intergenerational Group Work: The tools in this section focus on addressing the ways that power can show up in collaborative group work, and establishing the kind of culture that enables all participants to actively contribute and have their experiences and ideas be valued and respected. The tools include norm-setting; opportunities to name and address power dynamics and potential power imbalances that can surface in collaborative and intergenerational work, with a focus on adultism; and reflection on values that guide the Community Research Team's work with the community.

Storytelling and Issue Identification: With the "River of Life" activity, Community Research Team members take steps toward identifying potential focus areas for their research projects through sharing experiences with and reflections on the education system and, in a collective visioning process, radically reimagining the education system that they want to see. This activity sets the stage for SCORE Phase II: Research Preparation and Design.

Project facilitators should choose the tools from this section that feel most useful to their project and that fit within their time constraints. However, facilitators should not shortchange this phase. Building strong relationships and trust among Community Research Team members, and between Community Research Team members and project facilitators, holds equal importance to the research activities that follow. Cultivating an environment in which participants can both share their experiences honestly and develop an understanding of the experiences of others provides a necessary foundation for the more technical work to come.

1.1 Building Shared Understanding and Common Language

1.1.1

Introductory Key Terms

Creating shared definitions of key terms and concepts early in the SCORE process helps to build understanding and common language across the Community Research Team (CRT). The following definitions offer starting points. Providing the CRT an opportunity to edit or add to these definitions allows for not only greater ownership but builds on the knowledge and experience of team members.

Collaborative:	Two or more parties working together.
Intergenerational:	Youth and adults working together.
Educational Equity:	Each child receives what they need to develop to their full academic and social potential.*
Racial Equity:	When race does not determine or predict the distribution of resources, opportunities, and burdens for group members in society.**
Indicators:	Data and statistics that describe key aspects of schooling, and which help to evaluate schools, programs, educators, and students. Indicators are measured to show progress over time and/or differences.

* From The National Equity Project
** From The Office of Equity and Human Rights, Portland, Oregon

SCORE Project Overview

It will be important in the initial SCORE team session to develop a shared understanding of what the SCORE project is, what Community Research Team (CRT) members can expect during their time on the project, and to answer any questions that CRT members may still have. Ideally, this information will also be included in shared presentation slides or a handout so that CRT members can easily refer back to it. Some of the information may also be included in recruitment materials. Project facilitators will have an understanding of what's important to share in each SCORE context - the following are suggestions from an overview presented in the first meeting of the pilot SCORE project.

Project Overview and Goals

A brief overview of the key components and goals of SCORE.

For example:

> SCORE is a collaborative, action-oriented research project that brings together an intergenerational Community Research Team (CRT) of youth and parent leaders from [school district]. This team will:
> - Focus on racial equity in [school district], and creating environments that support all students to thrive;
> - Identify issues/indicators related to racial equity in education that are important to [school district] students and families, and how they can be measured;
> - Develop a tool or "SCOREcard" that will assess [school district] on indicators of equity that the community identifies as important.

Key Terms

See the **Introductory Key Terms** tool for suggestions of terms that may need shared definitions.

Timeline, Phases, and Major Activities

A graphic or short overview of the overall timeline of the SCORE project with its major phases, what CRT members should expect to do in each phase, partner roles, and relevant logistics (schedule, stipend information, etc.).

Related Resources

- **SCORE Preparation Phase: Questions and Considerations**
- **Introductory Key Terms**

1.2.1

Relationship and Team Building Activities

The following are examples of introductory relationship and team building activities to be used in initial SCORE meetings. Using different types of group configurations (pairs/triads, small groups, full group) can help to ensure that individual connections are able to happen alongside the full group getting to know each other. Activities and protocols in this tool include:

- **Introductions**
- **Building Initial Relationships**
- **Motivations and Hopes**

Introductions

In addition to Community Research Team (CRT) members, an initial SCORE meeting will likely have additional partners represented. At minimum these include staff/facilitators, but could also include leaders from partner organizations, representatives from the school system, and support staff such as interpreters. As noted below, you may want to approach introductions slightly differently for members of each of the represented role groups. In any SCORE meeting, but especially in early meetings when the group is getting to know each other, it will be important to limit individuals who are simply “observers” and make the role of each participant who is not part of the CRT clear.

Time Needed

Depends on group size; about 2 minutes per person

Process

Process

Starting with the CRT members, ask each person to share their name, pronouns, and organization/position (if applicable), and one or more tailored prompt questions based on their role group. Sample prompts are included in the descriptions below.

Community Research Team: Having CRT members share the schools that they or their children attend can give context to similarities or differences in educational experiences, and sharing their educational hopes can preview why they’ve engaged in this work.

Sample question: "What are your hopes and dreams for your/your child’s education?"

Facilitators/Staff: Developing trusting relationships between staff/facilitators and CRT members will be critical to the success of the project. Sharing information of a more personal nature can help to both humanize staff/facilitators and frame them not as leaders, but rather supporters or partners to the CRT.

Sample question: "Where do you come from? Why do you do this work?"

Partner Organizations: It may be useful to have leaders from additional partner organizations (including community based organizations and/or the school system) attend part of an introductory meeting to clarify their roles and show support for the project. Regular participation of these individuals is usually unadvisable, given that it may constrain the CRT's willingness to speak freely. However, engaging them at strategic points throughout the process can help to ensure ongoing support.

Sample question: "Why are you/your organization supporting SCORE?"

Building Initial Relationships

Starting with casual, fun questions can help participants get to know each other as people and become comfortable sharing with others in the group. This will ideally prime individuals to be more comfortable sharing when later meetings delve into weightier discussions of educational experiences, educational inequities, and desired changes in the school system. Staff/facilitators should participate in (but not dominate) these initial relationship-building discussions to soften power dynamics and help humanize staff.

Time Needed

25-30 Minutes

Materials/Resources

1) **Virtual breakout rooms**

Process

Preparation

Pre-plan triads in advance, ensuring that to the extent possible each contains a combination of a student, parent, and facilitator/staff member.

Process

Participants take part in a series of triad (three-person) discussions, held in virtual (using a platform such as Zoom) breakout rooms.

Each discussion round lasts for 7-8 minutes and has two prompt questions (see sample questions below). Facilitator keeps time and lets participants know when they're at the halfway point and when the round is completed.

The activity should have at least two discussion rounds, but can continue for additional rounds if there is time in the agenda. For each round after the first, the triads are changed so that participants get to talk with different individuals.

Debrief the activity by asking a few volunteers to share something that stood out to them from the experience. This could include (but is not limited to) things like how it felt to get to know other participants or staff, any commonalities or differences they found with others in the group, or any surprises that came up in their conversation.

Note that opportunities for relationship-building will regularly be built into future meetings.

Sample Questions/Prompts:

- What is your favorite food ever and why?
- What is your favorite thing to do by yourself?
- What is something you consider yourself really good at?
- If you could have any superpower, what would it be and why?
- What is one thing you do to recharge your batteries when you are burnt out?

Motivations and Hopes

Having Community Research Team (CRT) members reflect on and share their motivations for being part of SCORE and hopes for what will result can further connect members, and also provide a touchpoint to return to at strategic points in the process. An anonymized summary of motivations and/or hopes (see below for sample) can also be a useful tool to share with partner organizations or decision-makers.

Time Needed

20 - 25 Minutes

Materials/Resources

1) Virtual breakout rooms
2) Interactive slides (such as Google Slides) or virtual whiteboard tool (such as Jamboard)

Preparation

Interactive whiteboard/slides prepared with prompt questions.

Process

Participants have 5 minutes for individual silent reflection and writing on discussion prompts (below).

Participants type their responses into an interactive virtual whiteboard or slides that the group can view. If participants are having trouble with the interactive tools, they can share their responses with a facilitator who can type on the platform being used.

Break into two small groups to share reflections. In each small group, each participant shares responses for one or both questions (as much as they are comfortable sharing or as much as there is time for). If time allows, discuss as a group after sharing individual responses.

If the CRT is multilingual, consider having one of the two small groups facilitated/conducted in a language other than English, so that non-English speakers can engage directly rather than via an interpreter. If you have mixed-multilingual groups, translate contributions to the virtual whiteboard/slides in real time.

Sample Discussion Prompts:

- What is motivating you to be part of the SCORE project?
- What end result do you hope to see from this project? Who might benefit from the project?

Follow-Up

Following the meeting, facilitators compile the motivations and hopes to share in the future, as a reminder of why participants have taken part in the project and what they hope to see come out of it, as well as a way of showing common motivations and hopes across the group (see sample on the next page).


Motivaciones del Equipo de Investigación Comunitaria / Community Research Team's Motivations
Las experiencias que puedo compartir como padre.
Experiences I can share as a parent.
Para que mis hermanxs tengan una mejor experiencia que yo.
So that my siblings can have a better experience than I did.
Ver a mi hija y sus compañeras prosperar.
Seeing my daughter and her peers thrive.
Aprender más sobre lo que están enfrentando otros estudiantes.
Learning more about what other students are facing.
Darle a las madres y padres las herramientas y conciencia para prosperar.
Giving parents the proper tools and awareness to thrive.
Una pasión para mejorar PPSD.
Passion for bettering PPSD.
Escuchar de otros padres y estudiantes.
To hear from other parents and students.
Representación para minorías.
Representation for minority folks.
Asegurarse de que nuestros hijos sean respetados en sus escuelas.
Making sure our children are respected in their schools.

Identity Mapping and Paseo

This activity, which was adapted from a protocol developed by the **School Reform Initiative**, asks participants to name elements of their identities that they view as particularly important and then reflect on and share how these identities have informed their educational experiences. In the progression of relationship building for Community Research Team (CRT) members, this activity marks the transition from relatively casual "getting to know each other" conversations to sharing more personal stories related to educational experiences and inequities.

Time Needed

35 - 55 Minutes

Materials/Resources

1) Virtual breakout rooms
2) CRT members should have paper and something to write with, or facilitators may share an electronic identity map template

Process

Preparation

Create a sample identity map.

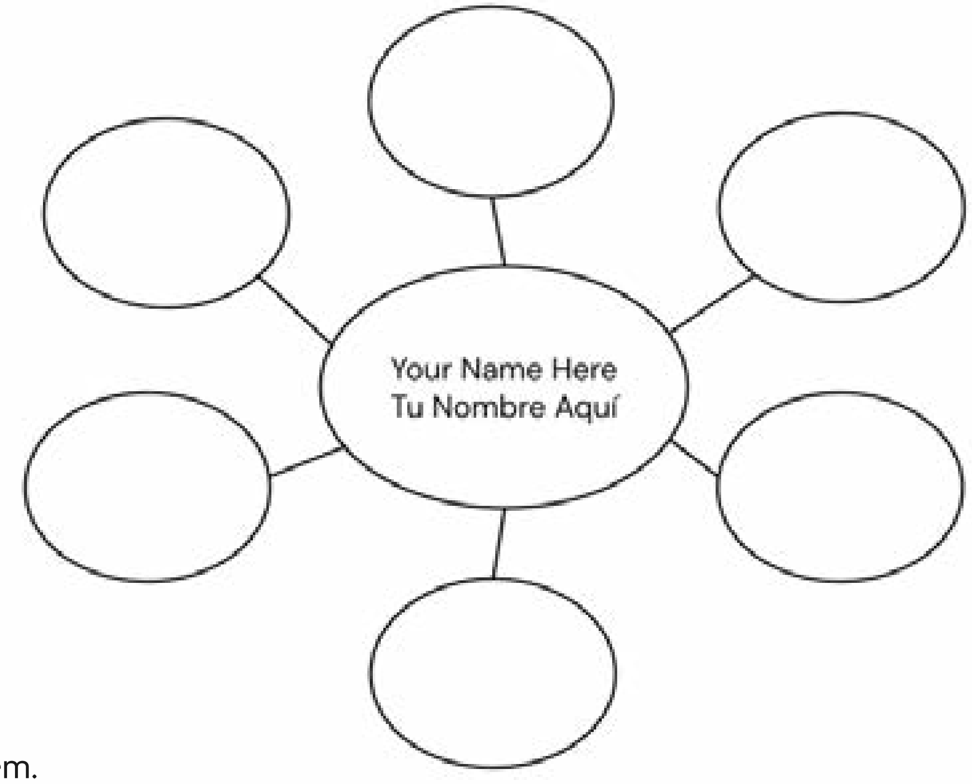
Pre-plan Paseo pairings for all rounds, with a goal of creating interactions between CRT members and/or staff who may not have yet connected one-on-one

Process

Project staff should participate in this activity, with the exception of the main facilitator/timekeeper.

Part I: Identity Mapping (10-15 Minutes)

Have participants draw a central circle that has their name, with five to six connected circles surrounding it (see example on the right).



In each of the surrounding circles, participants write a word or phrase that captures some element of their identity. These are terms or descriptors that have most shaped who they are and how they interact with the world. Identity elements such as race and ethnicity, gender identity, sexuality, hometown or regional affiliation could be included, as could descriptors like "funny" or "shy" or "first generation college student." There is no right or wrong way to do this activity - the ultimate goal is for each participant to name five or six identity elements that are most important to them.

A facilitator may want to show an example of a completed identity map.

Make clear that individuals won't be asked to share their identity maps with anyone else, though they will have discussions related to the elements of identity that they listed.

Note: To save time, Part I of this activity may be assigned as homework, so that participants come to the activity with identity maps completed. A homework guide with a modifiable Identity Map template can be found here: **Identity Map Homework**.

Part II: Paseo (25-30 Minutes)

In a series of rounds, the facilitator will ask the group to think about and discuss in pairs their responses to a series of questions (see sample prompts, below). Explain the process for each round before sharing the discussion questions:

- Each round will take approximately five minutes.
- The facilitator will ask a question to the full group. Participant pairs will then be placed in virtual breakout rooms.
- Everyone will have one minute to think silently about their response to the question. This helps to ensure that pairs can listen to one another's responses and not be focused on what they're going to share while the other person talks.
- When one minute reflection time is up, each person takes turns responding, without interruption, for two minutes. The facilitator will note when the first two minutes have passed, and the second person in each pair should share.
- At the end of the second two minutes, the facilitator will call time and ask pairs to say goodbye to their current partner, and will close virtual breakout rooms.
- A new round will then begin, with the facilitator asking a new question and participants being placed into new pairs and virtual breakout rooms.

Three rounds will allow for a variety of pairs and a series of questions that can grow incrementally deeper, though you can modify to have as many rounds as you have time or interest for.

See the original **School Reform Initiative** protocol for information on setup for in-person meetings.

Part III: Debrief (5 Minutes)

Allow time for participants to reflect on the experience of participating in the Paseo.
Debrief questions may include:

- What did you learn (about yourself, or about others) during this activity?
- What from this activity will you take with you as we continue with SCORE?

Sample Questions & Prompts

- Which elements of your identity (and related experiences) most powerfully inform how you approach this project?
- Describe a time when one of the elements of your identity worked to your advantage in an educational setting.
- Describe a time when one of the elements of your identity worked to your disadvantage in an educational setting.
- In your experience, which elements of young peoples' identities seem most important or relevant to their educational experiences? Why?

Related Resources

- **Identity Mapping Homework** Assignment
- Original **Paseo Protocol** (from the School Reform Initiative)

Ongoing Relationship-Building Activities

Check-In Questions

Starting each Community Research Team (CRT) meeting with a check-in question is a simple way to continue the thread of relationship-building throughout SCORE. Check-in questions can help participants learn more about one another's lives and cultures, gauge the temperature or mood of the group, and/or connect to the content of the session. Check-in questions can also be used to engage participants who are early or on time for a meeting while giving a few extra moments for latecomers to arrive before diving into the agenda.

Time Needed

5 Minutes

Process

Process

In the opening few minutes of each meeting, invite participants to respond popcorn-style to a brief check-in question. In virtual meetings, participants can either unmute to share or type a response into the chat.

Sample Check-In Questions

- What is your favorite flower or plant?
- What's been a high and a low of the week so far?
- On the **chihuahua scale,** what number chihuahua are you feeling today?
- Assuming you had the talent, in which Olympic sport would you like to compete?
- Who were your favorite celebrities as a young child?
- What is your favorite local activity or event?
- You have your own talk show - who do you invite as your first guest?
- What is your favorite breakfast food?
- What's your favorite way to get in some exercise?
- Who is your favorite superhero?
- What superpower would you like to have?
- If they made a museum about your life, what's the first thing they would display?
- If you could have credit for any invention in history, what would you choose?
- Would you rather travel back in time to meet your ancestors or to the future to meet your (or your family's) descendants?
- Who is someone in your community who makes a difference?
- What is something you've come across recently that's given you hope or inspiration?
- What is your favorite Halloween, Día de los Muertos, or other fall holiday memory?
- What's your favorite fall comfort food?
- If you could go back to any grade in school, which one would you go to?

1:1 Check-In Protocol

The purpose of one-to-one check-ins is to have the opportunity for project staff/facilitators to touch base with Community Research Team (CRT) participants outside of a large group setting and to continue to foster community between CRT members and project staff/facilitators. Both the relationship-building component as well as the individualized setting can encourage CRT members to share candid feedback on how the project is going for them and to identify any additional supports that would aid their participation.

Time Needed

- 30 minutes each (via phone, video call, or in person).
- Check-in calls should happen about every six to eight weeks, and on an as-needed basis if a particular member is not engaged or having trouble participating.
- As the project progresses and relationships between staff/facilitators and CRT members become stronger, check-ins may become less frequent or formal, or may focus on support or clarity for particular SCORE tasks or catching participants up if they miss a session.
- CRT members should also be encouraged to reach out if they'd like to have a check-in with project staff for any reason (including to arrange individualized support on project activities).

Preparation

Determine any guiding questions for the check-in, including items that need to be addressed with particular CRT members.

Process

Reach out to CRT members individually to schedule check-ins via phone, video call, or in-person.
1:1 check-ins should feel like conversations, not interviews. Feel free to share your own thoughts as project staff about how project sessions have been going.

The script and prompt questions below can be used as a guide, though ideally conversations are more organic. Staff/facilitators can best gauge the questions that should be asked based on observations about how SCORE is going at various points in the process.

Jot down some notes if you're able during the conversation, or write reflections after the call is done.

1:1 Check-In Sample Script

1:1 Check-In Sample Script

Introduction:

We are scheduling these one-on-one conversations with all of the members of the Community Research Team. We understand that sometimes it's not easy to share in a large group, especially as we are all still getting to know each other. This is why we wanted to have these opportunities to check in with you and see how you are feeling about the project and what opportunities we may have to improve the work that we're doing.

Check-in Question:

See **Check-In Question Tool** for suggestions.

Sample discussion prompts:

- How do you think the SCORE project is going so far? Ask to explain.
- Is there anything we could be doing to make your participation easier or more comfortable?
- What activity or activities have you enjoyed the most so far? Ask to explain.
- What would you recommend that we change or do differently as we move forward?
- What is something you are looking forward to doing with the team?
- Check on any potential barriers to full participation (technology, transportation, child care, etc.)
- Is there anything else that you would like us to know or you would like to add?

Closing:

Thank you so much. If you think of anything else you would like to check in about, please don't hesitate to email/call. We hope to have these check-in conversations about every six to eight weeks to make sure we can be responsive to anything that may come up for folks as they participate in the project.

Related Resources

- Check-in Questions Tool

Follow-Up

Follow-up to address any individual support needs that arise.

If multiple project staff are conducting 1:1s, schedule a debrief to share themes, discuss common feedback or differences in participant experiences, address support needs, and make project modifications based on participant feedback.

Mid-Point Check-In:

At roughly the project mid-point, when research activities are well underway, it may be useful to have more reflective questions for the CRT to process their SCORE experience so far. This may be done as a brief survey rather than conversation to allow more time for reflective thought.

Sample Questions:

- What is one thing you have learned about research design?
- What is one thing you have learned about yourself?
- What is one thing you have learned about your community?

1.3 Power Dynamics and Intergenerational Group Work

1.3.1

Developing Community Agreements

Collectively setting community agreements (also called group norms) gives Community Research Team (CRT) members an opportunity to name guidelines or expectations for how all participants (including facilitators) show up, participate, and interact in the group space. Thus, they begin to shape the kind of group culture that participants feel will be most beneficial throughout their time on the project. Community agreements also offer a point of reference if behavior or interactions surface that are hampering the group's overall participation or collective work.

Time Needed

10-15 Minutes

Materials/Resources

1) Interactive slides (such as Google Slides) or virtual whiteboard tool (such as Jamboard)

Process

Preparation

Prepare interactive slide or whiteboard with virtual post-it notes (see **sample here**).

Process

Ask participants to share popcorn-style what would make them feel comfortable/safe in this space.

For each suggestion, ask for group agreement. If all agree, record the suggestion. Be sure to check the chat for suggestions from participants who may not feel comfortable speaking up or be able to unmute. Additionally, if your group is multilingual, translate contributions to the virtual whiteboard/slides in real time.

If needed, facilitators add a few suggestions, which go through the same process of group agreement (suggestions .are included below).

Sample Community Agreements:

- Don’t diss my rice: If someone gives their opinion, don’t invalidate what they think.
- Ouch, Oops, Whoa: If something hurts you say ouch. Oops means you realize you said something hurtful. Whoa means you need to take a moment to have a conversation about this.
- ELMO: Enough, let’s move on.
- Make space take space: Make sure everyone has an opportunity to speak.
- Step up, Step up: If you take space in conversations make sure to leave space for others, and if you don’t speak up push yourself to say something.
- Don’t yuck my yum: Don’t compromise how people feel about their opinion.
- A literacy moment: Don’t be afraid to ask to explain what terms and acronyms mean, or if you need help understanding something.
- Vegas Rule: What’s said here stays here, what is learned here leaves here.
- Use “I” statements: Speak for yourself and not other people.
- Listening: Listen to understand, not to respond.
- Stack: For virtual meetings, write “stack” in the chat to get “in line” to speak.

Follow-Up

Note that community agreements are only useful if they’re used. Many projects develop community agreements early on, without referring to them later in the project. Community agreements should be included or posted in all future meetings, reinforced through their use, and should be open to additions or edits as needed throughout the life of the project. Community agreements should also be provided ahead of time to any guest speakers or others joining the group.

Related Resources

- Sample Interactive Community Agreements Slide

Youth Can Activity

In intergenerational work, it can be unfortunately common for adults to lead spaces of planning, decision-making, and power, or for adults to take young peoples' opinions and ideas less seriously than their own. This is known as adultism, and can deprive groups of the valuable energy, experiences, and wisdom that youth bring.

This activity, adapted from the New York youth-led organizing group Youth Force, is designed to examine participants' attitudes about youth participation and leadership using different scenarios. It prompts valuable discussions among the Community Research Team (CRT), and sets the stage for all participants to see and respect the many capacities and leadership that youth participants bring to the SCORE project.

Time Needed

60 Minutes

Materials/Resources

1) Virtual breakout rooms
2) Interactive slides (such as Google Slides) or virtual whiteboard tool (such as Jamboard)

Process

Preparation

- Determine "Youth Can..." prompt statements, including some that directly connect to your project's core activities
- Create virtual slides/whiteboard with prompt statements and position category choices (see **example here**)
- Create four virtual breakout rooms named with the four position category choices

Process

Note: This activity is a virtual adaptation of a "Four Corner" activity, in which participants show their position on a specific issue or statement by standing in a designated corner of the room. For a virtual context, breakout rooms are used to mimic the corners where participants would stand.

Part I: Youth Can Activity (50 Minutes)

The facilitator introduces the purpose of the activity and outlines the instructions below to the full group.

Each round of the activity takes about 12-15 minutes. For each round, the facilitator will start by reading one statement that includes a task or action. Each statement is framed with the opening words, "Youth Can...." (See sample statements/prompts below.)

Participants will each take a moment to determine which of the following options, represented visually on an interactive slide/virtual whiteboard (see **example here**), best describes their opinion about that statement. The choices are:

1) Youth can do this alone.
2) Adults should do this alone.
3) Adults should do this with input from youth.
4) Youth can do this with some adult assistance.

Participants will first share their choice in the group chat, then self-select into virtual breakout rooms based on the choice they selected. Have a staff facilitator assist any participant having difficulty selecting a breakout room.

In each breakout room, participants have 5-7 minutes to discuss why they made the choices that they did. If possible, it may be helpful to have a facilitator in each breakout room to get the conversation started. Encourage participants to be honest and transparent about their beliefs so that they can have fruitful conversations throughout the activity.

Facilitators alert participants when they have one minute of breakout time remaining, and each room should choose one spokesperson to explain to the full group why their group chose the way they did.

When back in the full group, each group's spokesperson takes about one minute to summarize their group's position. When all have shared, the facilitator may open up the opportunity for group discussion or debate with a prompt question such as, "After hearing from the other groups, would anyone change their position?"

Once a round is completed, the facilitator reads a new statement and the process repeats. If possible, have a minimum of two or three rounds, though the precise number of rounds that you do will depend on the time that you have available.

Part II: Debrief and Closing (10 Minutes)

After the final round is completed, debrief the activity with the full group. Ask for a few volunteers to share out loud, and for others to add thoughts in the chat. Discussion prompts may include:

- How did you feel doing that activity?
- What lessons can we take from it in our work with young people?

Close the activity by thanking everyone for sharing and reiterating the purpose of the activity. While sometimes we may be accustomed to thinking of adults as "doers," and young people as "helpers" or "followers," it will be crucial in SCORE for youth and adults to work alongside each other and for adult participants to intentionally make space – and often follow the leadership of – the young people on the team.

Sample Statements & Prompts:

1) **Youth can** plan and facilitate a workshop.
2) **Youth can** design, distribute, and analyze a research survey.
3) **Youth can** conduct research interviews
4) **Youth can** present research findings to educators and school district administrators.
5) **Youth can** create an evaluation plan for [your school district].
6) **Youth can** lead negotiations with the school district.

A Note About Intergenerational Work

In the pilot SCORE application process, a number of youth specifically raised concerns about their voices being undervalued or diminished when working with adults, so it felt important to address this issue early in our time with the Community Research Team (CRT). In addition to conducting activities around adultism and other power dynamics, our project staff also intentionally observed meetings with an eye toward intergenerational wdynamics, to identify and address not only examples of adultism from either CRT members or ourselves, but any situations or activities where youth were not participating at the same level as adults.

Related Resources

- **Sample Youth Can Position Statements Slide**

Levels of Youth Participation and Power

This tool, developed by CYCLE's Youth Leadership Team, can be used with both adults and youth to reflect and assess where an organization or group stands with relation to levels of power held by youth, or to kick off conversations about how young people want more or less support from adults in a group or project. Asking participants to first think about other groups they have been part of allows them to draw on past experiences to help inform the levels of youth power they would like to see in the SCORE Community Research Team (CRT). The Levels of Youth Participation and Power[1] graphic can be referred to throughout the duration of the project, or the group can repeat this activity at strategic points in the project as a self-reflection tool or to see if there has been movement in the group's positioning.

Time Needed

35 Minutes

Materials/Resources

1) <u>Levels of Youth Participation/Power</u> Graphic
2) Virtual breakout rooms

Process

Preparation

Pre-plan small groups in advance, to ensure that each has at least two youth representatives.

Process

Introduction (5 minutes): Introduce the Levels of <u>**Youth Participation/Power Graphic**</u> to participants. The chart graphic is used to explain different levels of power that are held by youth in an organizational or group context.

Divide the group into two virtual breakout rooms, each of which contains at least two youth.

Silent reflection (5 minutes): Ask participants to think of an organization or group that they are or have been a part of that involves young people. They can choose to share the name of the organization or group with other participants or keep it anonymous. For the organizations or groups that they have identified, ask participants to write their own notes about:

- Where on the chart they think the group is today, and why
- Where on the chart they would ideally want their group to be, and why
- What it would take for their group to move from where they are today, to where they want them to be

Small group discussion (10 minutes): Ask for a few volunteers to share their thoughts on the reflection questions. If possible, encourage youth participants to share first.

Transition all participants back to the main Zoom room.

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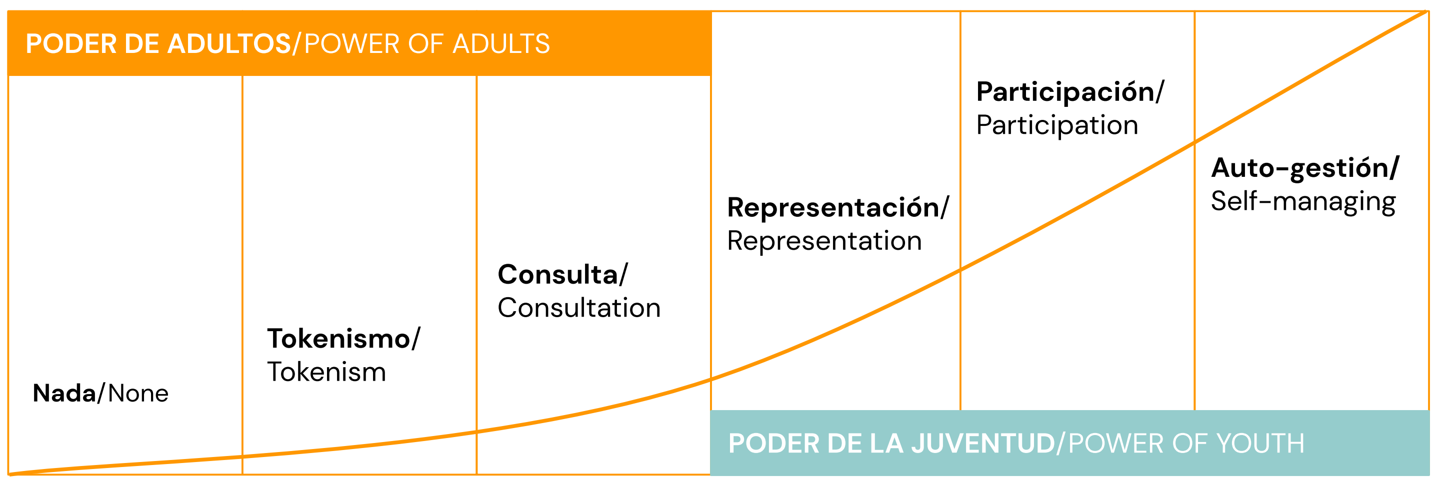
[1] Levels of Youth Participation/Power was adapted from Northern Ireland Youth Council and BEST Initiative, (Health Resources in Action, 2011). This tool also draws from Hart's Ladder of Participation:: Hart, R. A. (1992). Children's participation: From tokenism to citizenship (pp. 1-38, Rep. No. 4). Florence, Italy: UNICEF International Child Development Centre.

Full group (15 minutes): Ask participants to once again review the Levels of Youth Participation and Power Graphic (shown below), this time thinking about the SCORE project. Ask them to take a few minutes of silent reflection to write notes about:

- Where on the chart they want the SCORE CRT to be, and why?

Ask for participants to share in the chat which level they would like the CRT to be, and ask for volunteers to share why they selected their chosen level. Take note if there is consensus among the group, or if further discussions need to be had about the level of participation and power that youth will have in SCORE. If there is consensus, ask the group to brainstorm how the group can ensure that they reach the desired level in practice and take notes.

Niveles de Participación/Poder de la Juventud Levels of Youth Participation/Power



Nada/None	**Juventud no es incluida**/Youth are not included.
Tokenismo/Tokenism	**Los adultos establecen la agenda y hacen decisiones. Puede ser que consulten con uno o dos jóvenes o que ellos sean visibles, pero sus perspectivas no son consideradas necesariamente/** Adults set agenda and make decisions. One or two young people may be consulted or visible, but their views are not necessarily considered.
Consulta/Consultation	**Los adultos consultan a los jóvenes dentro de los parámetros de los adultos/** Adults consult young people within adult parameters.
Representación/Representation	**Un cierto número de jóvenes son puestos al frente representado al resto del grupo/** A select number of youth are put forward for their peers, in collaboration with adults.
Participación/Participation	**Jóvenes establecen la agenda, eligen asuntos y actividades y tienen responsabilidad junto a los adultos/** Youth set agenda, decide on issues and activities, and have joint accountability with adults.
Auto-genstión/Self-managing	**Jóvenes trabajan sin ninguna o con poca autoridad de adultos/** Youth work with little or no adult authority.

Follow-Up

It may be useful to return to this tool at the project mid-point to rate where the group is on the chart relative to where they would like to be, and if necessary, what changes should be made to move in the appropriate direction. A similar process can be used for reflection at the project's conclusion.

Related Resources

- **Levels of Youth Participation and Power Chart Slide** (English and Spanish)

Power in Group Settings and Identifying Power Moves

In addition to adultism (see related tools **here** and **here**), many other types of power dynamics or disparities can emerge in collaborative group work. These are often tied to patterns or systems of identity-based power, privilege, and bias that can lead to disrespectful or even discriminatory thinking or behavior - for example, with factors such as race, gender, class, language fluency, ability, educational attainment, and formal role or hierarchical position, among others. By having participants reflect on their past experiences with power in group settings, they can begin to envision and define how power might show up and can be addressed in the SCORE Community Research Team (CRT). Note that it is important for staff facilitators to be aware of and acknowledge the power differential that may accompany their role and to be intentional and transparent about sharing power with the CRT members.

Time Needed

25 Minutes

Materials/Resources

1) **Sample Questions/Prompts** assigned as homework
2) Virtual breakout rooms

Process

Preparation

Pre-plan pairs in advance, particularly if you want to ensure that each has an adult and youth participant.

Process

Have participants reflect on the sample prompts below as homework, so they come to the activity ready to discuss their responses.

Pair discussion (10 minutes): Assign participants to pairs and put in virtual breakout rooms to discuss their responses. Note that they should prepare to share out their collective responses to questions 3 and 4 (which deal with power in the SCORE project specifically) with the full group. It may be useful to have each pair consist of one adult and one youth participant.

Full group discussion (15 minutes): After transitioning back to the full group, have each pair first share out their responses to question 3 (what the group can do to show a commitment to sharing power) and then their responses to question 4 (what actions or behaviors related to power the group would want to discourage). As participants share out, capture their response on a series of **"Power Moves"** slides that are shared with the group:

- Power With - Things to Do
- Power Over - Things to Avoid

If your group is multilingual, translate contributions to the "Power Moves" slides in real time.

The list of Power Moves can be used as a companion piece to the group's **Community Agreements**.

Sample Questions & Prompts

Sample Questions & Prompts

Power dynamics, or the distribution of power in groups, most often shows its impact with whose voices are most respected or given priority, and who is given (or takes) authority to make decisions. An example of a problematic power dynamic could include one member of a group dominating discussions to the exclusion of other opinions, and moving forward with decisions that represent their individual interest over the collective interests of the group.

Shared power, on the other hand, is rooted in respect for all voices, mutual support and encouragement, and a commitment to collaborative decision making. An example of shared power could include those who have a role as formal leaders making sure to hear from each member of a group, and moving forward with the consensus of the group even if it differs from their own ideas.

Prompts

1) Describe a time when problematic power dynamics showed up in another group or setting. What do you think contributed to that dynamic? How did you feel or respond?
2) Describe an experience you've had in a group setting in which people were sharing power in a positive way. What do you think contributed to this dynamic? How did you feel or respond?
3) What do you think the Community Research Team AND staff facilitators can do to show a commitment to sharing power and ensuring all voices are heard and respected?
4) What kinds of actions or behaviors (on the part of Community Research Team members AND staff facilitators) would we want to discourage?
5) After thinking about the questions above, is there anything you would like to add to our SCORE norms/community agreements?

Follow-Up

As with the community agreements, it is wise to have the list of Power Moves available for reference, and it may be useful to return to them explicitly at any point necessary during the CRT's time together.

Related Resources

- Sample "Power Moves" Slides
- Developing Community Agreements Tool

Liberatory Design Mindsets

The Community Research Team (CRT) wears many hats throughout the SCORE process, one being designers. The team will largely design how the project unfolds, conduct research design, and ultimately design the equity indicators that they will take back to the community. As designers, it is important for the CRT to try to liberate themselves from habits that may maintain inequity and rethink the relationships between those who hold power to design and those impacted.

Using the Liberatory Design Mindsets created by the **National Equity Project**, this session engages the CRT in personal reflection and group discussion about the collective attitudes, beliefs, and values that guide their collaborative group work and, ultimately, community-based research. These attitudes, beliefs, and values will shape how they engage with each other and other community members while resisting structures and processes that too often disempower youth and parents. Ultimately, the use of this tool can help the CRT decide which approaches make sense for them and ensure that their decisions throughout the SCORE project center equity and liberation and align with their values.

Time Needed

20-30 Minutes

Materials/Resources

1) Handout with the set of Liberatory Design Mindsets adapted from the National Equity Project
2) Virtual breakout rooms

Process

Preparation

Optional: The set of Liberatory Design Mindsets may be given as pre-work, with instructions for CRT members to think about which 2 or 3 of the mindsets are most important for their work with each other and as they begin conducting research in the community.

Process

Part I: Read and prepare to discuss the Liberatory Design Mindsets (5-10 Minutes)

If pre-work was not assigned, provide copies of the document and 10 minutes to prepare for break-out conversations. Ask participants to read the set of Liberatory Design Mindsets and think about which 2 or 3 of these are most important for their work with each other and in the community.

If pre-work was assigned, ask participants to take an additional 3-5 minutes to review the Liberatory Design Mindsets and identify the 2 or 3 that they think are most important for their collective work.

Play quiet music while people are reading and thinking.

Levels of Youth Participation/Power was adapted from Northern Ireland Youth Council and BEST Initiative, (Health Resources in Action, 2011). This tool also draws from Hart's Ladder of Participation:: Hart, R. A. (1992). Children's participation: From tokenism to citizenship (pp. 1-38, Rep. No. 4). Florence, Italy: UNICEF International Child Development Centre.

Part II: Discuss the Liberatory Design Mindsets (20-25 Minutes)

In virtual break-out rooms of about 3 people each, participants share the Liberatory Design Mindsets they chose and talk about WHY they chose them - what makes these mindsets so important for the work they are doing? (15 minutes)

After coming back together as a full group, each small group shares one Liberatory Design Mindset they discussed, focusing on what makes it important for their work. Facilitators record the mindsets that were named and how they relate to the project. (5 minutes)

Thank everyone for engaging in the conversation. Explain that as the group continues with the work, they will keep returning to the Liberatory Design Mindsets to refocus on how they want to do the work.

Follow-Up

Connecting values-based mindsets with community research: Aligning on equity - or liberatory - mindsets is part of the CRT's preparation to do research in the community. It will be helpful to return to the highlights from this discussion and/or the Liberatory Design Mindsets handout before or after a session focused on how to conduct research with good ethics.

The visual below highlights how these mindsets might provide a bridge between ethics training and the technical work of designing research plans and tools, which will ultimately help to reground the group in the common values and goals they have for their work.

Related Resources

- Liberatory Design Mindsets Handout (adapted from the National Equity Project)

1.4 Storytelling and Issue Identification

1.4.1

River of Life

This activity, inspired by and adapted from the work of the **Family Leadership Design Collaborative**, aims to engage the Community Research Team (CRT) in collective storytelling and (re)imagining the education systems that they want to see, reaching beyond the limitations of what feels impossible, and creating a visual representation of the group's shared experiences and future vision. It uses the visual of a flowing river as a space in which participants can name and discuss their individual experiences with education in the past and present, as well as the school system they want to see in the future. Taken together, the River of Life begins to identify collective issues of interest and importance from which the group can determine their areas of focus for research projects and, eventually, indicators.

Time Needed

2 Hours

Note: *If you have time constraints, this activity works well when spaced out over two consecutive meetings. For example:*

- Meeting I: Introducing the activity, sharing and discussing the Message from the Future II video, and completing the "Present" section of the River of Life.
- Meeting II: Completing the "Past" and "Future" sections of the River of Life.

Materials/Resources

1) **A Message from the Future II: The Years of Repair" video with subtitles enabled (if needed) - available on The Intercept website or YouTube**
2) **Interactive slides (such as Google Slides) or virtual whiteboard tool (such as Jamboard or Mural)**
3) **Virtual breakout rooms**

Preparation

Using a virtual whiteboard tool or interactive slides, create a graphic of a River that has three panels or segments running from left to right:

- The Past (left side)
- The Present (middle)
- The Future (right side)

A sample, created using Mural, can be found **here**. You can use whichever platform is accessible to and best for your group - the most important factor is that the platform is interactive, and participants are able to add words or phrases directly onto the River itself.

Process

Part I: Radical Reimagining and Moving Beyond "What's Possible" (Video and Discussion) (20 Minutes)

The 9-minute video, "A Message from the Future II: The Years of Repair," was developed by The Intercept and can be found on **their website** or **YouTube**.

The purpose of sharing this video is to prime CRT members to deeply (re)imagine what their education system could look like. Encourage participants to pay attention to the ways in which the video reimagines the future.

Note that the video does have some intense imagery, so participants should feel free to "step out" as they see fit.

After viewing the video, open up for full group discussion on the prompts:

- What stood out to you in this video?
- Where did you see examples of the future being radically reimagined? How did that make you feel?

Part II: River of Life Introduction and Demo (10 Minutes)

Introduce your graphic of a River that has three panels or segments running from left to right:

- The Past (left side)
- The Present (middle)
- The Future (right side)

Participants should begin with the "Present" panel, and begin thinking through needs, challenges, and opportunities that they see in their educational landscape. This can include those related to family, communities, schools, out of school settings, and educational justice as a whole. Share the prompt question for the Present:

- Present: What are the current needs, challenges, and opportunities that you see when thinking about the educational landscape in [school district]?

After thinking the question through, participants will begin to add their responses as words, short phrases, or drawings to the "Present" river panel. Participants can add as many responses as they like.

The facilitator can illustrate the process with an example from their own experience. This is not added to the final river, but can be used to both humanize the facilitator and provide guidance for the activity. Depending on participant familiarity with the online platform, it will be useful to give a demonstration and check to ensure that all participants are able to access the interactive platform and add directly to the River.

Part III: River of Life Contributions and Discussion (30 Minutes Per Segment)

5 Minutes Think/reflect and add words/phrases to the appropriate segment of the River.

10 Minutes Pair participants, and put pairs in virtual breakout rooms to discuss what they added to the River segment. Share prompt questions:

- Discuss the words/phrases/drawings you added to the river. What led you to include these?
- Feel free to ask questions. Just make sure each person has time to share!

15 Minutes Transition back to the full group, where each participant shares verbally at least one of their contributions (whichever they feel is most important) to the segment of the River with the full group. To the extent to which they feel comfortable, participants can give context to what they wrote with personal experiences, or connect to broader systemic issues and/or forms of oppression. Ask participants to hold verbal questions or comments until everyone has shared, though they can make a note in the chat when things resonate with them or to thank others for sharing, or use virtual reactions (thumbs up, applause, emojis, etc.)

5 Minutes Debrief overall process

- If time permits, participants can state who made an impact for them with what they shared.

When the "Present" phase of the River is complete, move on to the Past, and finally the Future panels.

Prompt questions for each phase are outlined below.

Once the activity is finished, the group will have created a representation of their shared past, shared present, and a shared vision for what they want to see in their school system's future.

Sample Questions & Prompts

Present

- What are the current needs, challenges, and opportunities that you see when thinking about the educational landscape in [school district]?

Past

- Think back through your whole educational experience. Youth, think about your experience from elementary and middle school. Parents, think about your own education as well as that of your children.
- What from your past influences how you view the education system today?
- How have those experiences contributed to your wanting to make change in [school district]?

Note: Given that sharing past experiences may be difficult or even triggering, you may consider having the "Share" portion of the activity take place in small groups rather than the full group, and remind participants to share only what they are comfortable with.

Future

Begin to build your vision of educational equity in [school district] and its schools. Think of the best school system you can imagine for youth and families. Participants can respond to whichever question(s) resonate with them. Remind participants to think bravely, beyond the barriers set by the current realities of their school system.

- What would this school/district look like?
- What sounds (and conversations) would you hear?
- What would it feel like to go to this school/district or for your child to go to this school/district?
- What is happening (in classrooms, other school spaces, outside or around the building)?
- Who would be part of the school/district community?
- What would decision making look like in this school/district community?

Follow-Up

As a follow-up to the activity, project facilitators: 1) translate items added to the River of Life into additional language(s) as needed; 2) bucket the responses on the River of Life into theme areas, which will help to identify overarching issue areas that can become the focus of research projects and indicator development. These should be shared with the CRT at a subsequent meeting. Alternatively, if time allows, facilitators may opt to engage the CRT in a collective process of theme development. An example of a completed River of Life including theme areas can be found **here**.

Related Resources

- **A Message from the Future II: The Years of Repair** video (The Intercept)
- **Blank River of Life** (designed using Mural)
- **Completed River of Life with theme areas** (designed using Mural)
- **Community Design Circles: Co-designing Justice and Wellbeing in Family-Community Research Partnerships** (article from which the River of Life activity was adapted)

PHASE II

2.1 Research Preparation & Design

In order for the results of a research project to be considered trustworthy, attention must be paid to every detail of the research design. And in order to have a strong design, we need a clear understanding of the problems that we want to address. This phase is designed to invite participants to take a step back and get a holistic view of what is happening in their communities, and to examine possible contributing factors.

Research Preparation and Initial Design: The first set of tools in this section serves as a bridge between Phase I and Phase II. The River of Life metaphor or framework has multiple applications throughout this project. In Phase II, the river shows how the collective experiences of community members in the context of historical practices and social policies inform the present-day equity goals that we want to address. Although a number of social policies could be examined in this section, we offer a set of activities focused on redlining because of its ubiquity in the United States and its impact on school funding.

The next set of tools in the **Research Preparation and Initial Design** section introduces the concept of an educational equity indicator. Although the actual development of indicators comes at the end of this project, introducing the concept early and returning to it frequently helps remind participants what they are working toward. A brief Introduction to **Participatory Action Research** is also included in this section, to underscore the legitimacy of community members' cultural and experiential knowledge, and how it is not only valuable but essential to the research project.

Research Ethics and Design prepares community members to design their research study ethically, with integrity and attention to the values that the group wishes to uphold over the next several months.

The Research Methods & Mapping Methods to Research Questions tools are designed to emphasize the importance of aligning research questions with the methods that are best suited to address those questions. Included is an overview of several quantitative and qualitative methods to generate data.

Although each of these topics is listed separately for ease of use, they can be woven together in one or more longer sessions to build connections between these concepts and how they might be applied to a specific community.

Index of Phase II Tools

The River of Policy and Practice

The River of Life activity provided a metaphor that will extend throughout the SCORE process. As the project evolves, it is easy for Community Research Team (CRT) members to lose track of how the individual activities relate to the project as a whole. Returning to this visual frequently can help to orient the group to where they are in this process and what they are working towards.

Returning to the river metaphor throughout the research process helps to build a connecting thread through each phase of the work. In Phase II, we adapt the representation of the "river" of life to the "river" of policy. Here we emphasize that CRT members will seek to understand not just their individual experiences, but will conduct research to understand multiple people's experiences and make sense of them in the context of systemic policies and practices. These experiences can help inform present-day equity goals that address the root causes of problems in schools and communities. These equity goals then guide thinking about what future indicators are needed to measure and track progress on these equity goals. Below is an illustration of how the river might be represented - you can create it with the same tool you used for the River of Life graphic, and this example is also included in the **Phase 2 slides**.

1) (Past) Systemic Policies and Practices/ Historical Experiences
2) (Present) Present-Day Equity Goals
3) (Future) Indicators that can move us forward.

Materials/Resources

1) Phase 2 Slides
2) River of Life Activity

El "Rio" de Politicas / The "River" of Policy

Socio-Historical Influences in Education Policy: Redlining & Education

Understanding the connection between a community's history of housing segregation and other planning efforts can reveal disinvestments that have contributed to inequitable school district finances, and ultimately, students' inequitable access to resources. For example, as a result of redlining, Black, Latinx, Southeast Asian, and other children of color are more likely to live in communities with fewer resources. Because school funding is tied to property taxes in most districts across the country, wealthier communities have better-resourced schools.

Research shows that students attending schools in wealthier communities are more likely to have stronger performance on multiple measures of academic achievement, such as standardized exams.

Materials/Resources

1) **NPR Code Switch video: Housing Segregation and Redlining in America: A Short History** [Warning: Explicit language]
   - To turn on subtitles in a different language, click on the CC
   - Then, click on the little gear
   - Select "Subtitles/CC"
   - Select "Auto-translate"
   - Finally, click on the language you need subtitles for
2) Redlining maps for the community (if available, through a source such as **Mapping Inequality**)

Time Needed

30-35 Minutes

Process

Note:

You may opt to do either or both parts of the activity below depending on time and resources available to you.

Process

Part I: The History of Redlining (15-30 Minutes)

Watch as a group **NPR Code Switch's video, Housing Segregation and Redlining in America: A Short History**. [Warning: Explicit language.]

Allow participants to reflect silently on the content of the video.

Discuss as a full group the consequences of historical disinvestments in the community on present-day school funding, and how that might affect other aspects of school. Possible discussion questions:

- Was any of the content in this video new or surprising?
- What practices made it so that having access to a well-resourced school is a challenge today?
- Other than redlining, what else might be contributing to the present-day challenges with access to a well-resourced school?

Share an example of disaggregated data to outline how differences among groups can be significant. An example is provided below, though local data may be more relatable and interesting to the CRT.

Part II: Understanding Local Redlining (15-30 minutes)

Use a resource like **Mapping Inequality** to locate redlining maps for the community. Participants should be able to identify familiar areas in the map before continuing.

Possible discussion questions after viewing the maps:

- What do you notice in these maps? Does anything surprise you?
- If funding is one of the root problems with inequity in schools, can we improve student performance by solely focusing on curriculum or test preparation? What do students need in order to improve their experience in school?
- Can the school district do anything to compensate for disinvestments in the community?

If redlining maps are not available for your community, consider **community mapping activities** (such as the community mapping activity available on the University of California at Berkeley's YPAR Hub) to identify community resources and areas of need.

Related Resources

- NPR Code Switch video: **Housing Segregation and Redlining in America: A Short History** [Warning: Explicit language]
- **Mapping Inequality website**
- **UC Berkeley YPAR Hub: Community Mapping Activity**
- **New Study: 5 Ways Racist 1930s Housing Policies Still Haunt Schools**

Developing Issue Briefs

Facilitators may wish to create issue or topic briefs from the themes that arise from the **River of Life** activity. These background briefs can serve as resources for informing Community Research Team (CRT) members of history and available data around these themes, highlight the ways in which issues are often systemic and long-standing and connected to the history of multiple types of oppression, and build understanding of the root causes of problems. As the CRT continues through the research process and to indicator development, this will help give context to why "quick fixes" to the problems they identified may not be available, and help the CRT to avoid surface-level indicators or recommendations. Additionally, the issue briefs can serve as foundational pieces for more detailed policy briefs around the eventual indicators chosen for the SCOREcard. These issue briefs should be developed following the River of Life activity, with time for CRT members to read them before they begin research design.

The issue brief is a short summary used to quickly inform readers about the issue or problem. The brief should be short, clear, concise, and presented in a community-friendly format. (Sample issue briefs can be found **here**.) Separating the brief into sections with headers and utilizing visual aids will keep the brief well organized and make the document more accessible. **Canva**, a free graphic design platform with a wide array of user-friendly features and templates, provides extensive design options for those without design knowledge or experience.

Issue briefs may include the following information:

- Background on the issue, including summaries and findings from research studies
- Relevant policies around the issue and a summary of the approach that the policy takes towards solving or addressing the issue
- A description of the historical evolution of the policy or issue, with an eye toward outlining the systemic nature of the issue and how it is tied to different types of oppressions.
- A description of which stakeholders are impacted by this issue/policy and how. For example, what are barriers to parents being involved in their children's schools? What are some barriers to youth leadership in schools?
- Connection with and description of current inequities
- National data, for example, data from the **Civil Rights Data Collection**, **National Center for Education Statistics**, or similar sources
- Relevant local data (if available), for example, from state departments of education, or school or district websites.
- Easily accessed and relevant information about current local work addressing the issue, for example from newspaper searches, campaigns by local community-based organizations, etc.
- References or bibliography, including online links where possible for further issue exploration.

Issue briefs may be given to CRT members to read on their own time, and/or you may choose to dedicate meeting time for small or large group discussion of the briefs.

Materials/Resources

Sample issue briefs:

1) English Learning Education and Immigration (**English** / **Spanish**)
2) School Counselors and Student Mental Health Supports (**English**/**Spanish**)
3) Youth and Family Engagement and Leadership (**English**/**Spanish**)

Understanding Educational Equity Indicators

Indicators are measures used to track progress or monitor conditions. Indicators can help guard against superficial actions and are a way to hold entities (e.g., school districts) accountable. For instance, a school district can respond to calls for more effective school-home communication by creating a newsletter or starting a parent advisory council. These actions may be helpful, but they do little to show that communication has improved in any way. If the district kept track, however, of the percentage of parents who respond favorably to a survey question like, "I feel that the district communicates important information in a timely manner," or, "I feel that the district listens to and responds to my needs," these could be indicators of effective school-home communications. Indicators let us know if something really has changed.

The activity found in the Equity Indicators handout is designed to facilitate the Community Research Team's (CRT) exploration of what indicators are and what they do and do not tell us. Note that there will be an ongoing tension between identifying indicators that address root problems and identifying indicators that the district has the capacity to do something about.

Time Needed

35-40 Minutes

Materials/Resources

1) Equity Indicators **Handout** and **Sample Knswer Key**
2) **Phase 2 Slides** (slides 2-5)
3) Virtual breakout rooms

Process

Process

Part I: Indicators Overview (10-15 Minutes)

Walk through key terms and the purpose of equity indicators. Main points are in the bullets below, and can be found on slides 2-5 of the **Phase 2 slides**.

Key terms and definitions:

- Equity (working definition): Each child receives what they need to develop to their full academic and social potential.
- Indicator: A measure used to track progress toward objectives, or monitor conditions over time.
- Proxy: A proxy stands in for something that is difficult to measure directly.

Purpose of equity indicators. Equity indicators:

- Guard against superficial actions.
- Are a way to hold the district accountable.
- Let us know if something has really changed.

After this introduction, give an overview of the content of the Equity Indicators Handout, focusing on main points that will give CRT members a grounding in what indicators are. (Participants can read the handout more closely on their own at another time.) Emphasize how indicators are often proxy measures for what they might really want to know.

Part II: Indicator Development Practice (25-30 Minutes)

Introduce the indicator development practice chart found on page 4 of the **Equity Indicators Handout**, which lists sample areas that community members might want to measure and asks them to brainstorm:

- A possible indicator
- What that indicator would tell us
- What that indicator wouldn't tell us (why it's a proxy)

Walk through the example (students' access to mental health support) in the first row.

Break participants into small groups to complete 2-3 additional rows (or as many as time allows) of the chart. Note that the measures listed in the table are just suggestions of what community members may want to learn more about. It may be useful to have a staff facilitator with each small group.

After the small groups have had a chance to complete additional rows of the chart, return to the full group to discuss their responses to each column.

A sample answer key can be found **here**.

Related Resources

- **Phase 2 Slides**
- **Equity Indicators Handout**
- **Sample Answer Key** to practice exercises

Introduction to Participatory Action Research (PAR) and Research Design

What comes to mind when thinking about researchers or experts? Some might think of professors in universities or science labs. But that is a limited way to think about research or expertise. There are lots of different ways of researching and knowing information. In fact, there is no consensus on the number of "types" of knowledge that exist, but there are three that are worth considering here: academic knowledge, experiential knowledge, and community knowledge (defined below). Community knowledge and experiential knowledge are valuable, and can be woven together with academic knowledge to comprise a fuller understanding of equity challenges. External researchers who may not be from the community (for example, university-based researchers) cannot always capture the nuances in community knowledge and experiential knowledge. This is why each community member on a PAR project is so valuable.

This activity, adapted from **Research for Organizing: A Toolkit for Participatory Action Research from TakeRoot Justice**, includes an introduction to PAR and an opportunity for the Community Research Team (CRT) to begin designing their research, and should leave CRT members feeling confident about their ability to contribute meaningfully to a research project. Note that the Research Design Handout is a critical element for shaping the rest of the PAR process, and will provide guidance for what research instruments and other tools will be needed in the coming months.

Time Needed

60-90 Minutes

Materials/Resources

1) **Phase 2 Slides** (slides 6-7)
2) **Research Design Handout**
3) Virtual breakout rooms

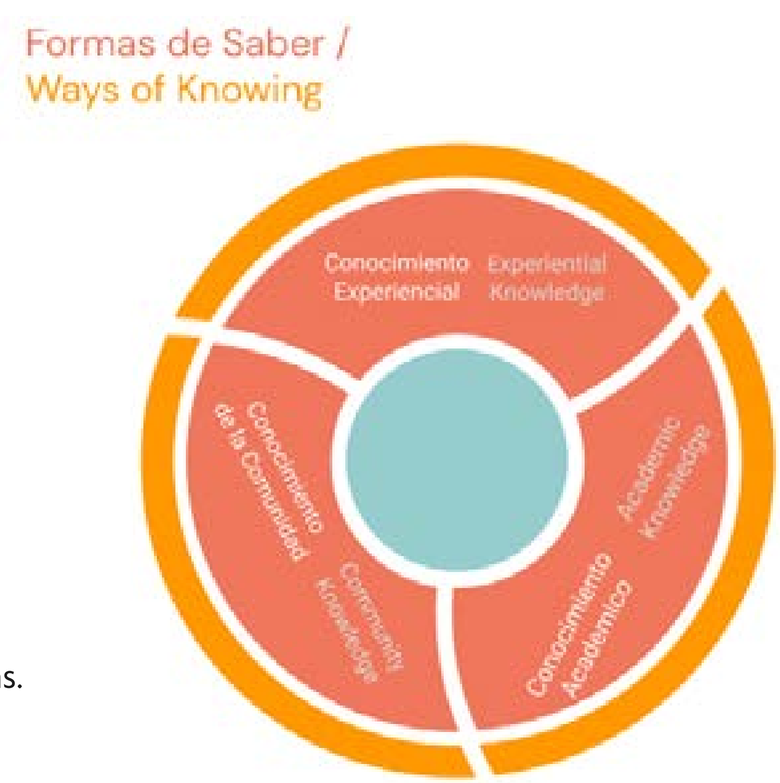
Process

Process

Part I: Introduction to Participatory Action Research (PAR) (10 Minutes)

Share with the CRT the "Ways of Knowing" graphic/slide (see the graphic on the right and on Slide 6 of the **Phase 2 Slides**), giving definitions for each way of knowing and emphasizing the value of community and experiential knowledge.

- **Academic knowledge**: The kind of knowledge we might get from textbooks, academic publications, university professors, or other institutions.
- **Experiential knowledge**: The knowledge one gains from living and experiencing life.
- **Community knowledge**: This kind of knowledge includes cultural practices and wisdom that gets passed down for generations.



Talk through the definition of Participatory Action Research (PAR) and/or its main components (summarized below and on slide 7 of the Phase 2 slides):

> **Participatory Action Research (PAR)**: PAR is used for research problems that are complex and require a team of researchers to do well. PAR recognizes and elevates the knowledge of youth, parents and communities. The goal is that some action will result from the work.
>
> **Participatory Action Research:** Combines social analysis and social action. Addresses complex problems. Recognizes and elevates the knowledge of youth, parents, and communities

Part II: Beginning Research Design (40-60 Minutes)

Give an overview of the content in the **Research Design Handout**. Give examples of the difference between qualitative and quantitative data, and the kinds of research instruments that will yield each type of data. (See "key terms" in the handout for more information.)

Divide participants into small groups by topic of research interest. The topics of research interest may be developed from the themes that emerged from the **River of Life** activity (see the Follow-Up section of the **River of Life** tool), or the CRT may have pre-determined research interests.

Have each small group go through the questions on pages 2-3 of the Research Design Handout - these address the What, Who, Where, and How of designing research. Each group should have a facilitator to help CRT members move through each set of questions.

At some point during this process, it might be helpful to give participants an opportunity to switch research groups if they find that they are not really addressing the research topics that best align with their interests. By the end of the process, encourage participants to make a (somewhat) final decision about the focus of their research.

Part III: Exploring Data Sources (10-20 Minutes)

At the end of the Research Design Handout is an appendix of secondary data sources. Encourage participants to explore what type of data is already available to address their research questions (which will be adapted from responses in the "What" section of the Research Design Handout), and what additional data might be needed. This document should be modified to include state-level data sources that might be helpful.

Some members of the CRT might have a hard time navigating or understanding these secondary sources, so staff facilitators should be ready to support them in looking through them. Take time to show participants how to use each source, and give them time to explore the tools.

Related Resources

- **Phase 2 Slides**
- **Research Design Handout**
- **River of Life tool**
- **Research for Organizing: A Toolkit for Participatory Action Research from TakeRoot Justice**

Follow-Up

The responses to the Research Design Handout will be critical for articulating research questions, deciding on methods, developing research instruments, determining research participants, and finding existing information on the research topics. Take good notes and be ready to come back to the handout as the CRT continues with research design!

A Note for Researchers in an Academic Setting

Once finalized, each group's Research Design Handout can be used to begin the process of amending an IRB protocol if needed.

2.2.1

Overview of Ethical Research

There are multiple approaches to research ethics, but the Belmont Report governs the ethical guidelines used by most academic institutional review boards (IRBs). Many IRBs do not have guidelines in place to address the unique conditions of community-based research and may require that community members participate in some form of research ethics training. The purposes of these tools are twofold: a) to help meet the requirements of an academic IRB; and b) to give the Community Research Team (CRT) a minimal foundation for research ethics. These tools were adapted from the **University of Pittsburgh Clinical and Translational Science Institute (CTSI), Community PARTners Core**.

This is primarily a training session. The content of this session is outlined below, and can also be found in the linked Overview of Ethical Research slide presentation, which contains presenter notes.

Time Needed

45-60 Minutes

Materials/Resources

1) Presentation points below and/or **Overview of Ethical Research** slides (including presenter notes).
2) **Tuskegee Syphilis Study** video (from Black History in Two Minutes)

Process

Process

Present the Ethical Research training using the presentation outline below or the Overview of Ethical Research slides. Some opportunities for discussion are built into the presentation, but be sure to also leave space for questions from the CRT throughout.

1) What is ethics? (Slides 3-4)
    a) Ethics involves doing the right thing.
    b) Good research ethics start with respect for everyone involved and a focus on benefits for the greater good.
    c) Ethical research is aligned to good values.
    d) When researchers are not ethical, people lose trust and are hesitant to be involved. This undermines future research.
2) Historical events have informed current guidelines. (Slides 5-7)
    a) Nuremberg Code (1947): "Rules for Treating Participants"
        i) Voluntary agreement of the participant is required.
        ii) Research must have potential to help society.
        iii) Should not cause mental or physical suffering.
        iv) Participant is free to stop at any time.
    b) Tuskegee Syphilis Study (**Tuskegee Syphilis Study** video)
        i) Ethics involves going the right thing. It starts with respect for the people involved and it benefits the greater good.
        ii) How is this an example of bad research ethics?
        iii) What was the impact?

3) **Belmont's 3 Key Ethical Principles** (Slide 8)
    a) Respect for persons (informed consent)
    b) Moral obligation to be good to others (risks vs. benefits)
    c) Justice (choosing and protecting participants)
4) Institutional Review Board (IRB) (Slide 9)
    a) The IRB makes sure researchers - including us - follow the three ethical principles.
    b) The IRB's role is to protect the rights and welfare of people involved in research.
5) What does the IRB do? (Slide 10)
    a) Provides support and guidelines on how to conduct ethical research
    b) Reviews and approves research studies (including changes)
    c) Protects human subjects involved in ongoing IRB-approved research
6) Informed consent is an important part of respect for persons. (Slide 11)
    a) Do participants have all the information they need about the study and their rights?
    b) Do they agree of their own free will?
    c) To give legal consent, a person must be 18 years old or older. If participants are minors, have their parents given informed consent? Have participants who are minors given assent, or agreement, to participate?
7) Informed consent means people have a real choice to participate and aren't coerced or persuaded by someone with power. (Slide 12)
    a) Coercion is when a participant feels pressured to participate.
    b) Coercion is an ethics problem that can happen unintentionally.
    c) Discussion: Approaching which potential participants (in this project), might involve coercion?
8) Loss of privacy is one of the biggest risks for participants. (Slide 13)
    a) All personal information must remain confidential (private).
        i) Behaviors
        ii) Observations
        iii) Interview results
        iv) Name, age, phone numbers, etc.
9) Protection from harm is the responsibility of the researcher. (Slide 14)
    a) Telling people about all possible risks.
    b) Do not enroll people who are likely to be harmed.
    c) For many studies, not observing privacy is the biggest risk of harm.
    d) Getting parent consent for youth is important.
10) Share with participants the risks and benefits. (Slide 15)
    a) Risks:
        i) Results from the study survey/questionnaires
        ii) Breach of confidentiality
        iii) Discussion: others?
    b) Benefits:
        i) Gain in knowledge
        ii) Having your voice heard
        iii) Process connects community to each other
        iv) May not be immediate
        v) Does not include compensation
        vi) Discussion: others?

11) Choosing participants (Slide 16)
   a) Fair process
   b) Include all who may benefit from research
   c) Include a diverse group of participants from all types of schools and programs
   d) Be careful with vulnerable populations
      i) Pregnant women
      ii) Children/youth
      iii) Prisoners
      iv) Mentally impaired
12) When thinking about the ethics involved in a situation, a researcher can look to the **three ethical principles** and ask themselves these questions: (Slide 17)
   a) Informed consent:
      i) Do participants have all the information they need about the study and their rights?
      ii) Did they agree of their own free will?
   b) Risks vs. benefits
      i) Do the possible benefits of this study outweigh the potential risks to the participants?
      ii) Have we reduced the risks as much as possible?
      iii) Are we protecting participants' privacy?
   c) Justice
      i) Have the researchers protected participants, especially participants who are vulnerable to exploitation (like children), from harm?
13) In summary, research involving people... (Slide 18)
   a) Attempts to improve programs
   b) Is only done with permission of participants
   c) Follows rules to make it as safe as possible
   d) Must be approved by an IRB

Related Resources

- **Overview of Ethical Research Slides** This presentation was adapted from an original presentation developed by: Michael Yonas, Elizabeth Miller, Maria Catrina Jaime and Shannon Valenti – University of Pittsburgh CTSI
- **Tuskegee Syphilis Study** video (from Black History in Two Minutes)
- **Belmont's 3 Key Ethical Principles**
- **Ethics Glossary**

Ethical Decision-Making Practice

The purpose of this tool is to train the Community Research Team (CRT) to make strong ethical decisions, especially when faced with tricky situations, and allow them opportunity for discussion and practice by using scenarios. This activity can be paired with and/or follow the **Overview of Ethical Research Training**.

Time Needed

30-60 Minutes

Materials/Resources

1) **"Three Ethical Principles" graphic/slide** (adapted from The Belmont Report: Ethical Principles and Guidelines for the Protection of Human Subjects of Research).
2) A set of four **Ethical Practice Scenarios** - you can use the practice scenarios included as part of this toolkit, and/or develop scenarios that relate more directly to your context
3) Virtual breakout rooms.

Process

Process

Part I: Ethical Principles Overview (5-10 Minutes)

Ground the discussion by reviewing the **Three Ethical Principles slide**, and the questions researchers can ask themselves when thinking through situations ethically.

- Informed consent
    - Do participants have all the information they need about the study and their rights? group or from a particular school)
    - Did they agree of their own free will?
- Risks vs. benefits
    - Do the possible benefits of this study outweigh the potential risks to the participants?
    - Have we reduced the risks as much as possible?
    - Are we protecting participants' privacy?
- Justice
    - Have the researchers protected participants, especially participants who are vulnerable to exploitation (like children), from harm?

Part II: Whole-Group Scenario Discussion (10-20 Minutes)

Go through the two scenarios below (also found in the **Ethical Practice Scenario slides**) and lead the group in a discussion about the research ethics involved. Scenario 1 presents good ethics decisions for discussion. Scenario 2 offers ethical problems for discussion. Encourage participants to refer back to the Three Ethical Principles slide as needed.

scenario 1

Scenario 1: Good Research Ethics

The Scenario: Researchers were conducting a violence prevention research project with high school male athletes. They distributed parent consent forms to students to take home to their parents to sign. The consent forms gave parent permission for each athlete to participate in an anonymous survey. The parent consent form included an introductory letter and contact information for the lead researcher (also called the principal investigator, or PI). A parent called with questions about the study and concerns about her son's participation. The PI followed up and addressed the parent's follow up questions about the study and discussed the parents' concerns. The parent had a positive reaction to the PIs follow up, especially her willingness to talk about their concerns. Within the following week, the high school athlete returned with the signed parent consent form. Before his participation in the study, the researcher also reviewed information about the research project with him and got his assent before he took the survey.

Basics:

- Participant – High School Male Athlete
- Research Staff – Worked in community based research projects
- Outcome – Staff addressed parent's concerns and developed an open, honest and comfortable relationship with parent and participant

Examples of Good Research Ethics:

- Consent process was conducted properly with participant and parent
- Researchers promptly followed up with parent's concerns
- Researcher provided support regarding non-study related concerns

scenario 2

Scenario 2: Poor Research Ethics

The Scenario: A group of researchers was doing a community research project. They came into a recreation center and started to interview the players who were waiting for the pre-game warm-up to begin. The players were between the ages of 12 and 14. The researchers did not explain the research project, or get consent from the parents or assent from the players. They just sat down and started to ask questions. When parents arrived to watch their children play, they were very upset to see these researchers (who were strangers) sitting and talking to their children and taking notes.

Basics:

- Participant: Child coming to recreation center to participate in after school basketball league.
- Research Staff: Recruited student during participation in basketball league without parent consent.
- Outcome – Inadequate consent process and poor research ethics

Examples of Poor Research Ethics:

- Approached participant inappropriately
- Improper consent process
- Made participant uncomfortable
- Made parents upset/angry

Part III: Small Group Ethical Scenario Practice (15-30 Minutes)

Break participants into smaller groups to discuss one or two more of the practice scenarios below (also found in the **Ethical Practice Scenario slides**). After reading the scenarios, ask participants: What would be examples of good ethical practice? What would be examples of bad ethical practice?

scenario 3

Scenario 3: Tricky Situation

A teacher in a school joins a research team to study reasons for absences in the school district. She needs to recruit students and parents to interview and she thinks, "I have access to all of my students and their parents right here in my daily work."

scenario 4

Scenario 4: Tricky Situation

Two members of the CRT just happen to meet each other in a local supermarket in the checkout line while shopping with their mothers and teenage children. The store is crowded and there are many people in line ahead of them and behind them. Being that they are both working on the SCORE research project, they would love to chat about where they are at in their research and what they have learned so far.

Related Resources

- "Three Ethical Principles" graphic/slide
- Ethical Practice Scenarios
- Overview of Ethical Research Training
- The Belmont Report: Ethical Principles and Guidelines for the Protection of Human Subjects of Research

Informed Consent Practice

An important part of ethical research is informed consent, and obtaining consent is one of a researcher's first steps when working with research participants. The purpose of this tool is to help the Community Research Team (CRT) to understand the purpose and process of informed consent, as well as what information must be shared, and ultimately to become comfortable obtaining informed consent from participants.

Time Needed

25-30 Minutes

Materials/Resources

1) **Informed Consent Practice Script**
2) Virtual breakout rooms

Process

Process

Part I: The Purpose and Process of Informed Consent (5 Minutes)

Review the purpose of informed consent (found in the Overview of Ethical Research tool and Slide Presentation). To ensure respect for persons participating in the study, you will need to make sure that:

- Participants have all the information they need about the study and their rights.
- Participants agree to take part in the study of their own free will.
- If they are minors, their parents have given informed consent.
- Note: To give legal consent, a person must be 18 years old or older. If participants are minors, have their parents given informed consent? Have participants who are minors given assent, or agreement, to participate?

Share an overview of the informed consent process:

- The researcher describes the research study.
- The participant asks the researcher questions and has time to make a decision on whether they want to participate.
- The participant agrees to participate (if 17 or younger, the parent gives consent and the participant gives assent).

Explain that, as part of informed consent, researchers must share and participants will need to understand:

- The fact that this is research
- Description of the study
- Risks and benefits
- Whether or not there are payments for participation
- Participation is voluntary and confidential
- You can withdraw at any time
- Contact person and information
- This information should be shared in a way that is accessible and easily understood by all potential research participants.

Part II: Informed Consent Role-Play and Practice (15-20 Minutes)

Role-Play Practice: In groups of 3, practice the informed consent process with a role play. Taking turns, try the process with the following different situations: (1) a compliant participant, (2) an uncertain participant, and (3) a participant that is hesitant and decides NOT to participate. Each participant should have a turn role-playing both the researcher (who will read the informed consent practice script) and a participant.

Practice Script (also available on the **Informed Consent Practice Script Slide**):

My name is __________ and I am conducting research about equity in [name of school district] and I am interested in your experiences as a [student/parent/teacher/administrator]. Your participation will involve one informal interview and/or a survey that will last no more than one hour. We will conduct this either on the phone or on Zoom. This research will benefit [your city/town] community because it helps us to understand how different [students/parents/teachers/administrators] perceive their school district experience.

This research has no known risks. I will work to make sure you feel safe and comfortable to share your thoughts and experiences. Also, please know that I will do everything I can to protect your privacy. Your identity or personal information will not be disclosed in any publication that may result from the study, nor will any direct quotes from this interview. Notes that are taken during the interview will be stored in a secure location during the process of the study, and then destroyed afterwards. Please know that your participation is voluntary, and you should feel free to discontinue this interview at any time if you feel at all uncomfortable.

- Do you give your consent to begin this interview (if 18 or over)? (Participant indicated yes/no)
- Does the youth's parent give consent to begin this interview? (Parent indicated yes/no)
- Does youth give assent to begin this interview? (Youth indicated yes/no)

*Researcher Note: You may take notes, but you are not to record the interviews in any way.

Part II: Debrief (5 Minutes)

After the small groups have had time to practice, return to the full group to share questions, reflections on the experience, and next steps.

Related Resources

- **Informed Consent Practice Script**
- **Overview of Ethical Research Tool** and **Slide Presentation**
- **Belmont's 3 Key Ethical Principles**

2.3 Research Ethics and Mapping Methods

Research Methods and Mapping Methods to Research Questions

A variety of methods can be used with participatory action research. It is important to note that certain types of research questions require certain types of methods. For instance, if a research question seeks to describe a trend or pattern across the district, then it makes sense to use a survey with a large number of people. If a research question seeks to understand why or how something is happening, then interviews or focus groups with a smaller number of people will be more appropriate. In this activity, facilitators will work with the Community Research Team (CRT) to provide an overview of different research methods (including surveys, interviews, focus groups, and visual methods), and to consider which method will best help to address a particular research question. Tools to help develop research instruments and analyze data for qualitative and quantitative research methods can be found in Phase III of this toolkit.

Materials/Resources

1) **Overview of Research Methods slides** (including presenter notes).
2) **Participatory Action Research (PAR) Menu of Methods** (from Research for Organizing: A Toolkit for Participatory Action Research from TakeRoot Justice)
3) Research questions drawn from the **Research Design Handout** used earlier in this toolkit (found under the question "What are the overarching questions you want to answer through your research?"). If needed, these questions can be refined or revised prior to the mapping methods activity.
4) **Mapping Methods to Research Questions Worksheet**
5) Virtual breakout rooms

Time Needed

60-75 Minutes

Process

Process

Part I: Overview of Research Methods (20-30 Minutes)

Review the Participatory Action Research (PAR) Menu of Methods (from Research for Organizing: A Toolkit for Participatory Action Research from TakeRoot Justice). This can also be given as assigned reading prior to this session.

Review the Overview of Research Methods slides. Leave time for questions throughout each major section of the presentation.

Part II: Mapping Methods to Research Questions (30-45 Minutes)

Break the research team into sub-groups if the team is working in sub-groups.

Walk through the Mapping Methods to Research Questions Worksheet. Provide the groups around 30 minutes to use the worksheet to do the following:

- Review your group's research questions.
- Determine what method(s) would help you best answer each research question. The Summary of Research Methods located in the Overview of Research Methods slides and/or the PAR Menu of Methods may be used as a reference.
- Determine your research participants - these are the groups (for example, students and parents) who can help answer your research questions by participating in the methods you choose (those who would take surveys, be part of interviews or focus groups, etc.).
- Plan your next steps. Have CRT members volunteer to take the lead in drafting specific survey, interview, or other questions for your data collection. (Tools focused on drafting survey and interview questions can be found in Phase III of this toolkit.) Divide the work so that it is distributed evenly across the CRT.

Come back together in a whole group to do the following:

- Debrief the group work.
  - How did it feel? What challenges did you encounter? How did you solve them? How are you feeling about the work to come?

Related Resources

- Overview of Research Methods Slides
- Participatory Action Research (PAR) Menu of Methods (from Research for Organizing: A Toolkit for Participatory Action Research from TakeRoot Justice)
- Research Design Handout
- Mapping Methods to Research Questions Worksheet
- Summary of Research Methods

Follow-Up

Have an overall timeline prepared for the drafting of research instruments such as surveys and interview protocols. Build in sessions that give more detail on what makes for good survey and interview questions - tools to support this can be found in Phase III of this toolkit.

PHASE III

Data Collection

We end Phase II emphasizing that research questions determine research methods. In Phase III, we dig more deeply into how to use the Community Research Team's (CRT's) chosen research methods in a way that will yield trustworthy research findings.

Survey Design and Conducting Research: A community-based research project can use both quantitative and qualitative research methods. Quantitative methods like surveys are helpful for generating data that identifies trends and patterns. The results of surveys can help refine research questions. So we begin this section with tools to help develop different types of survey questions.

Qualitative Methods: Although surveys are helpful, and can collect some qualitative data, they cannot capture everything. The best way to understand how or why something is happening is through additional qualitative methods. The remaining tools help participants develop qualitative methods to address their refined research questions. Although our CRT chose to focus on one-on-one and focus group interviews, we include a brief description of additional methods of generating qualitative data for consideration in your own project, as well as resources to support your use of these methods. These are included at the end of both the one-on-one and focus group interview tools.

Index of Phase III Tools

Survey Design

Surveys are easy to take, so it is easy to assume that they are easy to make. This activity helps participants to see how important well-designed surveys are for providing helpful information to address a research question, and has them start drafting their own survey questions.

Time Needed

60 - 75 Minutes

Materials/Resources

1) YPAR Hub's Violence Survey and Answer Key
2) Survey Design slide deck
3) Survey Design Guide
4) Mapping Methods to Research Questions worksheet
5) Virtual breakout rooms

Preparation

Recreate the **Violence Survey** in Google Forms for participants to access during the meeting.

Process

Part I: Violence Survey Activity (15 Minutes)

Have participants take the **YPAR Hub's Violence Survey**. If recreated as a Google Form, share the link to the form with participants to complete.

After everyone has taken the survey, ask the following about each survey question:

- What is this question asking?
- What is wrong with the question?

Use the survey and answer key to discuss connections between the questions in the violence survey, general types of survey questions, and pitfalls to avoid when creating survey questions. The Violence Survey answer key provides comments on the problems with each of its questions. The Additional Points of Discussion column on the next page includes further comments that might be helpful.

Violence Survey Activity

Concept	Quick Definition	Item Number(s) in Violence Survey	Additional Points of Discussion
Open question/ open-ended question	A question with an unlimited number of possible responses.	5	Open questions are helpful but should be used sparingly on surveys because they are more likely to be skipped. Incomplete data causes problems with analyzing, or making sense of, the results in the survey data.
Closed question/ closed-ended question	A question with a fixed number of possible responses (e.g., yes/no; agree, neutral, disagree)	1, 2, 3, 4	Closed questions tend to simplify data analysis because people are less likely to skip them, but if the questions are poorly worded, the responses will not be trustworthy. Make sure that each option in a closed question is clear, distinct, and provides enough information to address the research question.
Leading question	A question written to elicit a certain type of response	2	Leading questions produce biased results, and should be avoided. Otherwise the responses will not be trustworthy.
Multi-part question	A question that can be separated into two or more questions.	4	Multi-part questions should be avoided with closed questions, and constructed carefully (if used at all) with open questions to ensure that each part of the question is addressed.
Biased language or culture-specific questions	Questions with unclear, unfamiliar, or vague terms	1	Avoid questions that can be misinterpreted depending on language or cultural familiarity.

Part II: Survey Design (15 Minutes)

Use the **Survey Design Slide Deck** to discuss specific details about survey construction and additional types of survey questions. Additional talking points for the slides are below.

- Demographic questions—age, race, occupation, languages spoken at home are all demographic questions
- Questions about respondents' experiences and needs are critical to deciding what equity indicators to develop.
- Rank order questions can help with prioritizing a number of possible options.
  - E.g., ask respondents to rank Advanced Placement (AP) courses in order from most desired to least desired.
- A likert scale is often used to learn about people's opinions and attitudes about something.
- A matrix table is a way to ask several questions about a similar idea.

Part III: Drafting Survey Questions (30-45 minutes)

Divide participants into their working groups and direct their attention to the **Survey Design Guide**. Have each group use this, along with their **Mapping Methods to Research Questions worksheet**, to begin drafting their survey questions.

A Note About Likert Scales

Likert scales are really easy to make, but it can be hard to tell the difference between the categories. Also, if a question doesn't apply to someone, they might select "neutral" when really it's a question that should be skipped. Some researchers try to address this by adding a category of "no basis to respond." It's better, however, to tailor the survey to a population so that all of the questions will apply to them. Otherwise, it can make analyzing the data more challenging.

A Note About Designing your Survey to Avoid "Bot" Responses

Unfortunately, surveys can be vulnerable to bad actors on the internet, especially if they are distributed widely using social media. Survey responses from respondents who are not legitimate participants, including bots, will need to be identified and removed in order to preserve the integrity of the data collected in the survey. When designing surveys, it is helpful to keep this in mind and include at least one question that will help you to easily identify an illegitimate response. For example, you might choose one question, like "which [city] school does your child attend," for respondents to type in (rather than select) responses, so that you can remove blank responses or responses that are not actually schools in your city. See more information about survey security in the **Survey Distribution Planning** tool.

Related Resources

- Find the Violence Survey and Answer Key in the **YPAR Hub's Writing Survey Questions page**
- **Survey Design Guide**
- **Drafting Demographic Questions**
- **Survey Distribution Planning**

A Note About Online Survey Platforms

You might decide to use an online survey platform. Before selecting one, test some out so that you understand their features and limitations. You should consider:

- Ease of creating questions
- Ability to ask questions in the formats desired, including length limitations
- Distribution features and limitations
- User-friendliness for respondents, including language considerations
- Security features and limitations
- Data presentation and analysis features and limitations
- Cost

You may also need to discuss survey platform selection with your institution's IRB, if applicable.

Drafting Demographic Questions

Working with the Community Research Team (CRT) to draft survey questions that capture participant demographics can be used as an entry point to survey question creation – it gives the group a chance to work with the “do's and “don’t”s of survey creation – or a final step in the survey design process. Either way, including demographic questions can help the group to understand who their survey participants are and break down (or disaggregate) the survey data in ways that show similarities or differences across different participant groups.

Time Needed

30 Minutes

Materials/Resources

1) Charts included in this section's Process

Process

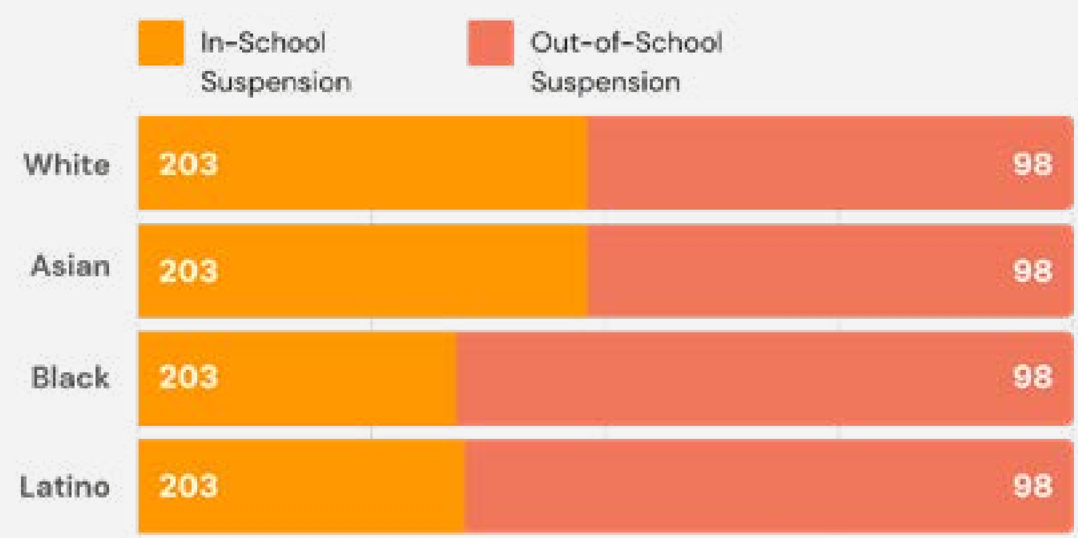
Part I: Why Demographics Are Important (5 Minutes)

Begin by reviewing with the CRT the value of collecting demographic data. Demographic data:

- Generally, gives us more information about who is taking our survey
- Helps us to understand who we're reaching with the survey, and if there are any gaps that we might have to address with additional outreach (for example, if we have few surveys from a certain role group or from a particular school)
- Helps us to understand if our sample (the group of people taking the survey) accurately reflects the larger population whose opinions we're trying to capture
- Allows us to disaggregate, or break down, the data by different groups - for example, to see if the experiences of students differ by factors such as race, gender, or school they attend.

Share an example of disaggregated data to outline how differences among groups can be significant. An example is provided on the right, titled **In-School vs Out-of-School Suspensions for Non-Violent, Non-Criminal, Non-Drug Offenses Activity**, though local data may be more relatable and interesting to the CRT.

In-School vs. Out-of-School Suspensions for Non-Violent, Non-Criminal, Non-Drug Offenses



Source: Lawyers' Committee for Civil Rights and Economic Justice Not Measuring Up: The State of School Discipline in Massachusetts

Part II: Survey Demographics Dos and Don'ts (5 Minutes)

Review the checklist of survey "do"s and "don't"s (taken from the **Survey Design slides**). These apply to demographic questions as well, though should be viewed as guidelines as opposed to strict rules (see note about defining identity categories at the end of this section).

Closed-ended questions / Preguntas cerradas

Answer choices that give you enough information / Opciones de respuesta que dan la suficiente información

X Open-ended questions / Preguntas abiertas

X Leading questions / Preguntas que induzcan respuestas

X Biased language / Lenguaje tendencioso

X Multi-part questions / Preguntas con multiples partes

X Questions that are too personal for honest answers / Preguntas que son muy personales para recibir respuestas honestas

Share examples of a few demographic questions, each framed first as a closed-ended question with answer responses, then as an open-ended question, and review why closed-ended questions are generally advantageous: 1) People are more likely to finish the survey when they have to write less; 2) Closed-ended questions make survey analysis easier.

Closed Ended	Open Ended
What grade are you in? • 9 • 10 • 11 • 12	What grade are you in? ______________
Gender (Choose all that apply) • Male • Female • Transgender • Non-binary • Prefer not to say • Other _________	What is your gender? ______________

Part III: Brainstorming Demographic Categories and Questions (20 Minutes)

Using the chart below, brainstorm the demographic categories that the CRT feels are important to capture. Sample "categories" for each prompt question are included. Note that there may not be time to brainstorm potential response options for all categories identified. This can be completed as a follow-up by project staff and shared with the CRT for review and revision at subsequent meetings as the survey is being finalized. Depending on the number of categories brainstormed, it may also be useful for the team to prioritize or edit the list of demographic questions so that it is more manageable.

Prompt Question	**Categories** Sample Responses Included	**Response Options**
Who are the respondents?	• Role (student/staff/parent) • Primary language spoken (at school and at home) • How many children in school district (for parents)* • Grade in school/child's grade in school* • Multilingual learner/English language learner	
Where are they from / where do they live?	• School they/child attend or work at • Neighborhood or zip code	
What identity categories are important to capture?	• Race/Ethnicity • Gender • Socioeconomic Status	

***Note:** When designing a survey for parents, you should discuss how parents who have multiple children in a school or school district should approach the survey. Do they complete one survey total, or one for each child? If one survey total, can you design the survey so that respondents can "choose all that apply" for questions such as "child's grade in school"?

A Note About Identity Categories

Closed-ended demographic questions are generally preferable for surveys and can make analysis easier, particularly if there are a large number of respondents. However, researchers and CRT members may experience a tension with categories such as race and gender where even an expansive range of response options is unable to capture the complexity of an individual's identity. In our experience, community members (and especially youth) will often push back on categories that feel unnecessarily limiting, or like they're putting people into boxes.

Michelle Fine and María Elena Torre discuss strategies for "creat[ing] space in [a] survey for respondents to describe in their own words their gender, sexuality, and race or ethnicity before asking them to check boxes." These include 1) a broad question such as, "What five words or phrases would you use to describe yourself?" that allow a respondent to introduce themselves in full complexity; 2) a three-question series for categories such as race and gender that strikes a balance between open-ended description and a closed-ended question with numerous options. For example, for the category of gender:

1) Open-ended: How would you describe your gender?
2) Closed-ended: If you had to use the following categories, which best describe(s) your gender? (Check ALL that apply.)
3) Open-ended: If you feel like the question above does not represent your gender expression, please explain.

Ultimately, the CRT will have to consider the goals or purpose of their survey as well as their context to make a decision about how to frame questions about identity. Discussing the ideas above or brainstorming other options with the CRT will help to ensure that, as best as possible, the final survey reflects the nuances and complexities of human identities – a foundational component of educational equity and justice.

Related Resources

- **Survey Design Tool**
- **Survey Design Slides**

[1]Fine, M., and Torre, M.E. (2021). Essentials of critical participatory action research. American Psychological Association.

3.2 Conducting Research

3.2.1

Survey Distribution Planning

Building a survey distribution plan with Community Research Team (CRT) members helps to ensure that the ideas, knowledge, and connections of community members are put to good use in getting a SCORE survey to its target respondents. The process outlined below involves group brainstorming for the HOW and the WHO of survey distribution, while also offering CRT members opportunities to lead outreach to particular groups. A related follow-up tool helps members to compose their personal outreach plan in greater detail.

Time Needed

35 - 40 Minutes

Materials/Resources

1) Charts/graphics for group brainstorming (detailed below)
2) Interactive slides (such as Google Slides) or virtual whiteboard tool (such as Jamboard or Mural)

Process

Part I: HOW - Outreach Strategies (15-20 Minutes)

Using the broad survey participant groups (such as students, parents, educators, etc.) that the CRT has identified, create a simple graphic that includes a section for each group with room to add text. An interactive slide or document, or tools such as Jamboard or Mural, work well. (See sample below.)

For each survey participant group, brainstorm together on the question of: "What are the best ways to share our survey with this group?"

- Note that outreach strategies will likely look different for different participant groups, though there may be some that are consistent across.
- If there are particular sub-groups that it is important to reach (for example, 12th grade students, or multilingual learners and their families), talk about specific strategies to reach those groups. It may also be useful to brainstorm important voices that are too often missing from discussions on the group's focus areas and think together about strategies to reach them.
- Encourage CRT members to be as specific as possible. For example, if someone says "social media," probe for a specific platform. If someone says "email," discuss whether you will use targeted emails, mass emails through a customer relationship management system, etc.
- Personal networks and connections should be included.

Students	**Parents**
Educators	**School & District Leaders**

Part II: WHO - Organizational Connections (15 - 20 Minutes)

This activity encourages the group to think about who might be able to help with survey distribution. Student, parent, and/or teacher organizations may assist with survey distribution by, for example, sharing a survey link with their mailing list, posting on social media, or displaying a flier about the survey with a link or QR code.

Create a simple graphic that has spaces for the names of organizations that have connections with broad survey participant groups, as well as any CRT member who is connected to that group (see sample at the end of this tool).

Lead the group through a brainstorm of organizations and ask for volunteers to reach out to them. Record the organizations and volunteers as the discussion progresses. Project staff may also volunteer to be the lead contact for certain organizations, particularly if CRT members are not affiliated with them.

Part III: Follow-Up

After the planning activities are completed, create a customized **Survey Distribution Resource Guide** for the CRT that provides a "one stop shop," including a personal outreach/distribution plan, notes from the group's outreach brainstorms, and any of the additional resources outlined below that feel useful.

- **Graphics**: Flyers or posters that are suitable for sharing online and/or printable. Project staff may design these, or there may be CRT members who are interested in taking on this task. All graphics should be available to CRT members in a central hub, such as a shared folder. For hard copy flyers, project staff should print and distribute to CRT members.
- **Survey Links**: Consider using an online link shortening tool such as TinyURL (**tinyurl.com**) or Bitly (**bitly.com**) to make a customized link that's easy to remember and access.
- QR Code: Consider creating a QR code that can be easily scanned with a smartphone to link to the survey. Online sites such as **https://www.the-qrcode-generator.com** or **https://www.qr-code-generator.com** can generate QR codes for free.
- **Boilerplate Text**: Developing sample text for outreach that can be easily customized can help CRT members get started on their survey distribution.

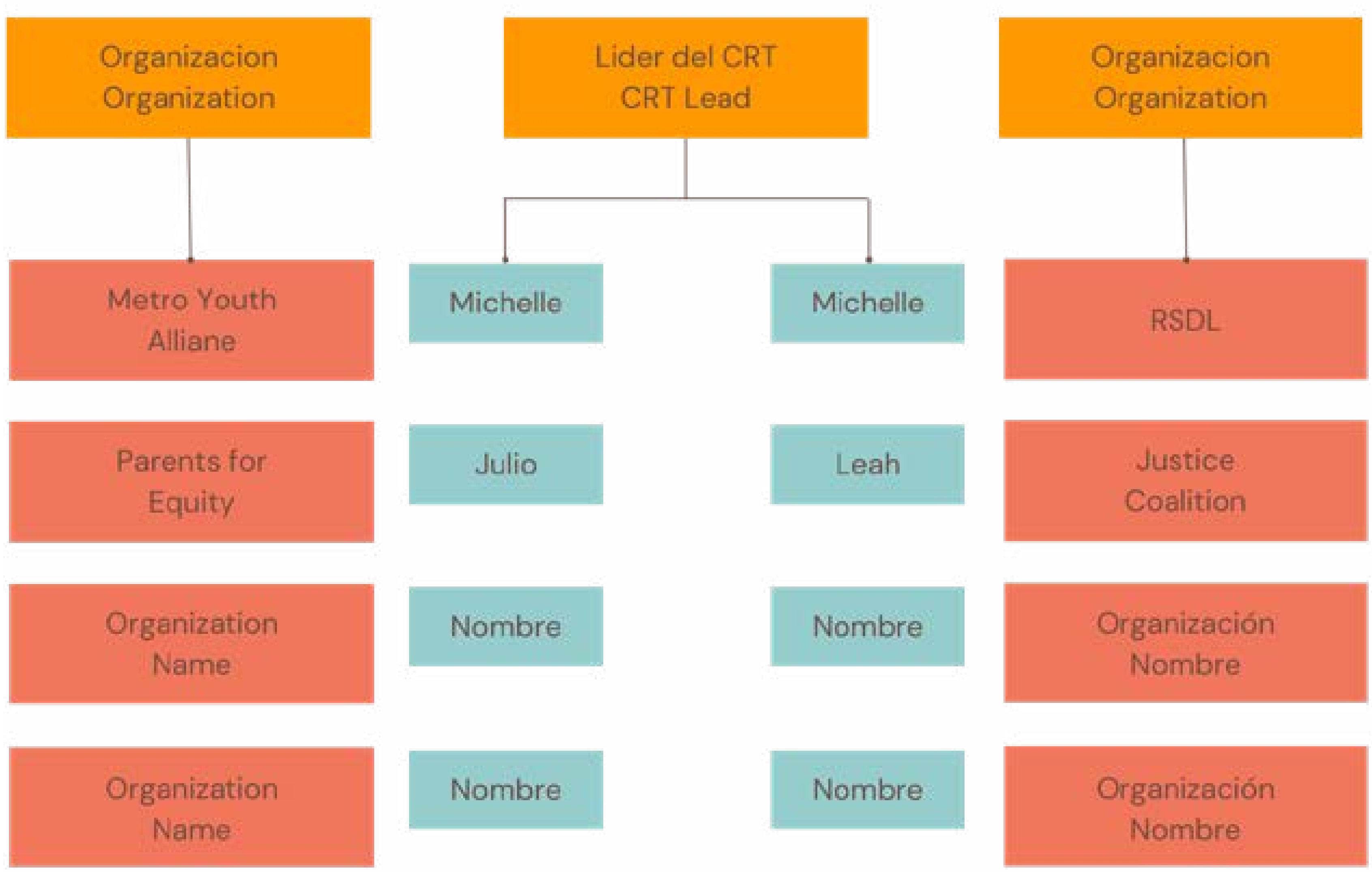
Take time at the next meeting(s) of the CRT to check in about how distribution is going and discuss any modifications that need to be made. Sharing the overall number of surveys received and some basic demographic information (such as participant group, school, or any subgroup categories that are important to your project) can help the group know where they might need to put more effort or shift strategies, particularly if the survey sample does not reflect the school or district demographics (for example, if 90% of your survey respondents identify as white and your school district overall has only 20% white students).

A Note About Survey Distribution and Incentives

While both the ease of sharing a survey link on social media and an incentive such as a gift card can help to reach more potential participants, both come with the risk of attracting individuals who may not actually be part of your school or school district community, or even bots. Sharing on Twitter, in particular, seems to leave surveys open to fraudulent responses, and we suggest avoiding it. Tools such as adding a CAPTCHA (Completely Automated Public Turing Test to Tell Computers and Humans Apart) or reCAPTCHA, can help to determine if a user is human through automated tests (such as typing in a series of letters and numbers, identifying images that contain certain objects, or clicking a box that says “I’m not a robot.”). Close monitoring of the survey responses can help to identify if there’s trouble - numerous responses coming in quick succession at odd hours, surveys that were completed in unreasonably short amounts of time, and contradictory responses in the same survey can all indicate responses that are not legitimate and should be removed from analysis. Additional strategies to help address this problem and identify false responses can be found in the **Survey Design Tool**.

Sample Graphic for Organizational Connections

Organizaciones de la Comunidad/Juventud/Padres
Community/Youth/Parent Organizations



Related Resources

- **Survey Distribution Resource Guide**
- **Survey Design Tool**

3.3.1

One-on-One Interviews

Qualitative researchers use one-on-one interviews to gain an in-depth understanding from one person's perspective. Qualitative interviews are different from the kinds of interviews often seen on television, and different from other methods of generating data. For example, these interviews might allow for discussions about more sensitive topics because their format makes it easier to preserve confidentiality than other data collection methods. A downside to one-on-one interviews is that conducting and analyzing interviews are time and labor intensive.

This activity helps community researchers think about what makes one-on-one interviews unique so that they can avoid potential pitfalls when conducting them.

Time Needed

60 - 90 Minutes

Materials/Resources

1) Phase 3 Qualitative Data Collection slide deck
2) Interview Guide worksheet
3) Mapping Methods to Research Questions worksheet
4) Virtual breakout rooms

Preparation

Review the YouTube video embedded on slide 5 of the slide deck in advance to make sure that the content (i.e., reference to drug use) is appropriate for the audience. Ensure that the closed-captioning auto-translate option is available in the languages spoken by the Community Research Team.

Make separate copies of the **Interview Guide worksheet** for each research team working group (if applicable).

Process

Process

Part I: Understanding One-on-One Interviews (20 Minutes)

Use slides 3 and 4 from the **slide deck** to discuss why the Community Research Team (CRT) might choose to conduct one-on-one interviews.

Review/discuss the following types of questions.

- Open-ended questions
    - Questions with an unlimited number of possible responses
- Clarifying questions/Probing questions
    - Questions that seek to understand what was shared/seek additional information about what was shared.
- Closed-ended questions
    - Questions with a fixed number of possible responses (e.g., yes/no; agree, neutral, disagree).
- Leading questions
    - Questions designed to elicit a certain type of response.
- Multi-part questions
    - Questions that can be separated into two or more questions.

Slide 5 includes a YouTube video of an interview between Oprah Winfrey and actor Lindsay Lohan. Play the first 2 minutes of this interview. Have the CRT listen for the kinds of questions Oprah asks.

Discuss:

- What stood out to you as you watched this?
- What kinds of questions does Oprah ask?
- Is this how interviews should go for researchers?

Explain that this type of interview is meant for television, but it is not how a researcher should conduct an interview. The interview in the video does include open-ended questions and probing questions, but there are also closed-ended questions, leading questions, and multi-part questions. Use the Interview Do's and Don'ts on slide 6 to discuss what should and should not happen in a research interview.

Part II: Developing and Facilitating a One-on-One Interview (40-70 Minutes)

Direct the CRT's attention to the **Interview Guide worksheet**. Consider discussing the following additional information in an overview of each section of the worksheet.

- Potential interview questions: Remember that the interview questions should be crafted to help address the original research questions.
- Guidelines for running the interview: Inform the community researchers that they are conducting semi-structured interviews, which means that they will ask open-ended questions that promote a discussion, instead of a strict Q&A format.
- Script for consent: If the research project requires IRB approval, remind the community researchers that they will need to read the script for consent verbatim.
- Guidelines for taking notes during interviews: Encourage those who are fluent typists to type their notes during virtual interviews.

Have CRT members divide into their research teams to draft interview questions. Interview questions can be derived from work done on the **Mapping Methods to Research Questions** worksheet and include follow-up questions based on results from any existing survey data.

At the end of the session, CRT members can try using the interview guide and their draft interview questions in mock interview sessions. In groups of three-four, CRT members can practice being the interviewer and the note-taker. Other group-members can play the role of participant being interviewed or, if there are more than three people, provide feedback to the interviewer. CRT members can use this practice exercise to refine their interview questions before conducting interviews with community members. Be sure to leave time for reflection on the mock interview experience to help CRT members process and cement take-aways for their work with the community.

A Note About Note-taking

Typing notes during an interview can save time, but this is likely to prove awkward in a face-to-face interview. CRT members should be prepared to take notes by hand during in-person interviews and type their notes immediately after the interview.

Related Resources

- "Oprah to Lindsay Lohan: 'Are You an Addict?'". YouTube. Uploaded by Oprah Winfrey Network, August 18, 2013. https://www.youtube.com/watch?v=GCY8giPElsg
- Phase 3 Qualitative Data Collection slide deck
- Interview Guide worksheet
- Mapping Methods to Research Questions worksheet
- Informed Consent Practice

Additional Data Collection Methods and Related Resources

Community mapping: A process of documenting and visually presenting trends or patterns in a given community.

- Research for Organizing's **Community Mapping activity**

Photovoice: The use of photography to document participants' experiences and/or communities.

- YPAR Hub's **Photovoice page**

Community visioning: A process where a group of community members come together to develop an alternative vision or proposal for the future of their community.

- Research for Organizing's **Community Visioning activity**

3.3.2

Focus Group Interviews

Focus groups are simply group interviews. They allow researchers to interview, and gain the perspectives of, multiple people at once. Potentially, a focus group can help some participants feel more comfortable than in one-on-one settings. Another benefit of a focus group is that participants can build on each other's responses. Because focus groups involve multiple people, they tend to be more challenging to coordinate and plan. Depending on the composition of the group, there may be different levels of participation from each person. And while having multiple people present can help participants to remember or reconsider some ideas, there is also the potential for "groupthink" bias, a tendency to respond similarly to others in order to fit in with the group. When constructed well, focus groups can be a fruitful method for generating data. This tool will provide guidelines for creating and running an effective focus group.

Time Needed

75 - 90 Minutes

Materials/Resources

1) Phase 3 Qualitative Data Collection slide deck
2) Focus Group Interview Guide worksheet
3) Mapping Methods to Research Questions worksheet
4) Virtual breakout rooms

Process

Preparation

Review the embedded YouTube video on slide 12 of the slide deck. Ensure that the closed-captioning auto-translate option is available in the languages spoken by the Community Research Team.
Make separate copies of the Focus Group Interview Guide for each research team (if applicable).

Process

Part I: Understanding Focus Group Interviews (15 Minutes)

Use slides 9-11 to discuss why the Community Research Team (CRT) might choose to conduct focus group interviews.

Slide 12 includes a YouTube video showing examples of well-run and poorly-run focus groups. Inform the CRT that they will watch a video that starts with examples of how not to run a focus group. Ask them to make a mental note of what makes this a poorly-run focus group.

Pause the video at the 02:48 mark, then ask the CRT about what was not done well. Be prepared to give additional examples that might have been missed, or continue playing the video which shows these additional examples through the 03:18 mark.

Now for the next portion of the video, invite the CRT to make a note of what makes this a well-run focus group. Start at the 03:18 mark and play to 04:48.

Discuss what the CRT saw that was done well. Be prepared to give additional examples that might have been missed, or play the remainder of the video which shows these additional examples.

Return to the slide deck and talk through the Focus Group Do's and Don'ts on slide 13, making connections to what was shown in the video.

Part II: Developing and Facilitating a Focus Group (45-55 Minutes)

Direct the CRT's attention to the **Focus Group Interview Guide** worksheet. Much of the information will be similar to the one-on-one Interview Guide worksheet. Consider discussing the following additional information in an overview of each section of the worksheet.

- **Guidelines for Developing Focus Group Questions**: Focus groups work best when the participant is comfortable with the researcher, and when the participants are comfortable with each other. So start with broad questions that help the group feel connected.
- **Potential Focus Group Interview Questions**: Remember that the interview questions should be crafted to help address original research questions.
- **Guidelines for Setting Up and Running a Focus Group Interview**: Be sure to point out the need to establish ground rules in a focus group.
- **Script for consent**: If the research project requires IRB approval, remind the community researchers that they will need to read the script verbatim.
- **Guidelines for taking notes during interviews**: Taking notes with multiple speakers can be challenging. While one CRT member facilitates, consider having a second CRT member present who can take notes and pay attention to body language.

Have CRT members divide into their research teams to draft focus group interview questions. Questions can be derived from work done on the **Mapping Methods to Research Questions** worksheet. They can also develop follow-up questions based on results from any existing survey data, or use questions developed for their one-on-one interviews.

Part III: Role Play Activity (20 Minutes)

Because data collection is a skill that gets better with practice, set aside time in the session to role play facilitating a focus group. Involve as many CRT members and program staff as possible to simulate a real focus group with about five people per group.

Encourage a CRT member to volunteer as facilitator and another CRT member to volunteer as note taker.

Creating fictional identities for each person to role play (e.g. a person that keeps going off-topic, a person who talks very little if at all, a person who tries to dominate the conversation, etc.) makes this activity a lot of fun for everyone, while increasing all CRT members' comfort with leading focus groups.

After about 10-15 minutes of role play, debrief the session, and refine any interview questions that need revising.

Follow-Up

CRT members can share revised interview questions with other team members after the session, and before the first focus group interview.

A Note About Recording Focus Groups

If the focus group interview will be recorded, opt for video recording over audio recording. Voices are difficult to distinguish in audio recordings and it will prove difficult to determine who said what after the interview is over.

Related Resources

- "Conducting a Focus Group." YouTube. Uploaded by UBC Learn, November 19, 2013. https://www.youtube.com/watch?v=Auf9pkuCc8k
- Phase 3 Qualitative Data Collection slide deck
- Focus Group Interview Guide worksheet
- Mapping Methods to Research Questions worksheet
- Interview Guide Worksheet
- Informed Consent Practice

Additional Data Collection Methods and Related Resources

Community mapping: A process of documenting and visually presenting trends or patterns in a given community.

- Research for Organizing's **Community mapping activity**

Photovoice: The use of photography to document participants' experiences and/or communities.

- YPAR Hub's **Photovoice page**

Community visioning: A process where a group of community members come together to develop an alternative vision or proposal for the future of their community.

- Research for Organizing's **Community visioning activity**

PHASE IV

Data Analysis & Indicator Development

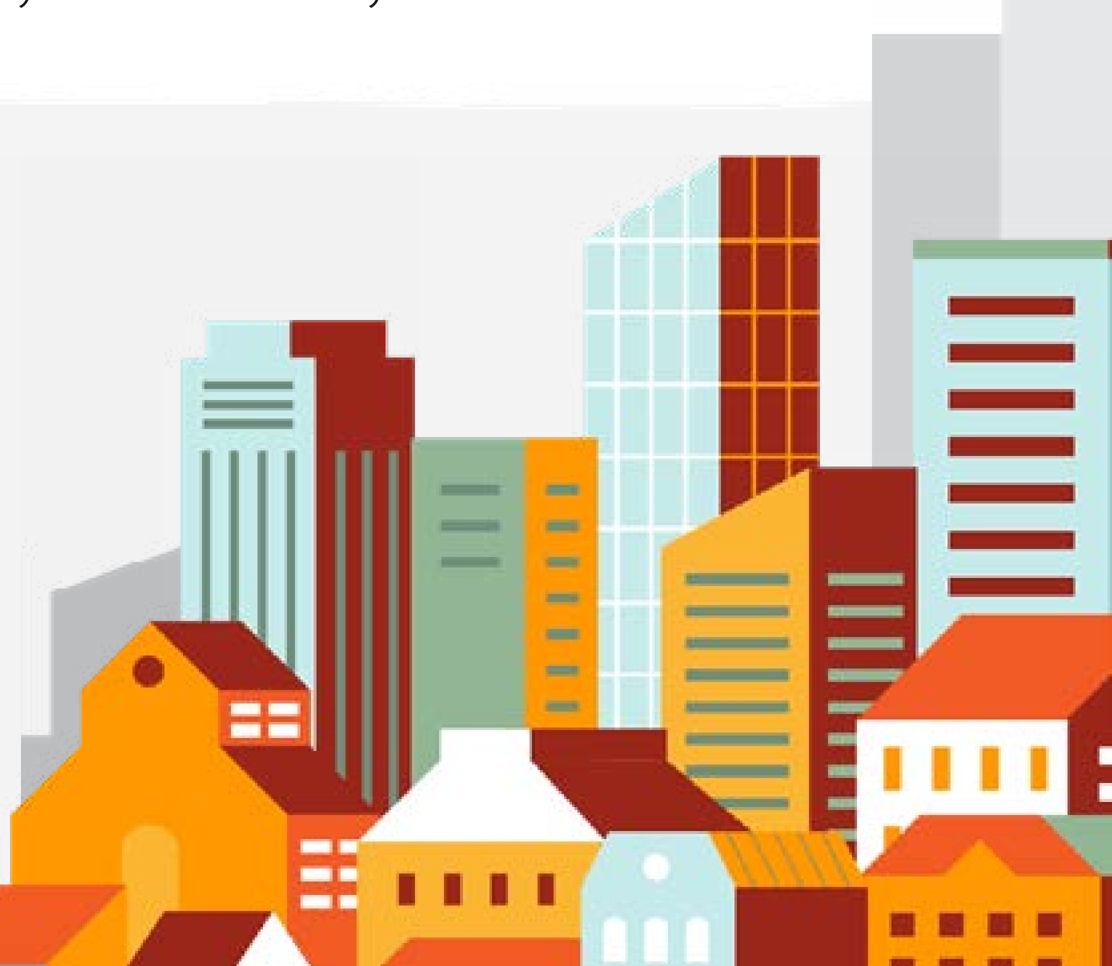
Phase IV is the culmination of the research process. Of course, once the research is completed, much more can be done in subsequent phases of this project, such as generating interest among community members and advocating for the adoption of these indicators by the school district. But first, this phase focuses on data analysis and finalizing a set of educational equity indicators. The steps in this phase can be described broadly as follows: 1) Determine what the data says about your community's needs and experiences; 2) Decide what is important to measure related to these experiences and needs; 3) Identify what information is needed for these measures; 4) Determine whether each measure is feasible to obtain. The development of these tools was highly contextualized, so our examples may not mirror your own, but hopefully they will be illustrative of how to adapt this for your community. The amount of time required to work through these tools can be extensive, and will require a considerable amount of staff time in supplemental data analysis and CRT meeting preparation.

The Data Analysis tools show our approach to collaboratively and systematically analyzing quantitative and qualitative data. Multiple rounds of data analysis, reflection, and discussion are needed to ensure that research findings are trustworthy and accurately reflect the experiences and needs of the CRT and their research participants.

From Analysis to Indicator Development tools are designed to help the CRT decide what is important to measure, and what information is needed for these measures. These tools are highly time- and labor-intensive; the **Outcomes and Measures Part I** tool is designed to prepare staff to guide the CRT through **Outcomes and Measures Part II**. Depending on the number of CRT members, Part I can take approximately three hours (or more) of staff time, and Part II can require 3-4 hours' worth of working sessions for the CRT members.

Reflection and Preparing for Implementation tools include opportunities to look both forward and back, and serve as a bridge to the next phase of the work – moving toward implementation of the CRT's indicators and products that will be developed from them. **From Indicators to Implementation Brainstorm** has CRT members start to think about how and by whom their indicators can be used, while the **Participant Reflection** tool asks them to pause to reflect on their experiences with SCORE and the significant amount of work they've done over the course of the project, as well as hopes for the impact that this work will have on their school system.

Index of Phase IV Tools



4.1 Data Analysis

4.1.1

Conducting Research Analysis: Quantitative Data

Quantitative data analysis is especially difficult to do in a collaborative way. Data visualization is very important because it helps make analysis more accessible to folks who may not have formal data analysis training. Quantitative methods can vary, but often will include some sort of survey or poll. Much like in **qualitative analysis**, a certain level of decision making will have to happen at the staff level to narrow down the universe of data the team will review at one time. This needs to be an iterative process, guided by the interests and instincts of the Community Research Team (CRT).

Time Needed

60 Minutes (Each Session)

Materials/Resources

1) Survey data points/visualizations for analysis (see note on preparation below)
2) Virtual whiteboard tool (such as Jamboard or Mural)
3) Virtual breakout rooms

Preparation: Preparing Data for Analysis

Staff will have to make some decisions over which data points to analyze first. This will largely depend on the interests of the CRT, previous conversations about what folks did or did not expect to see, and what data points stood out to those who did the initial data review. For this first iteration of this process, choose single variables (e.g., how many people selected x) rather than more complex data (e.g., how many people selected x dissagregated by race and gender).

Pull 3 data points and create a data visualization for each. This can be a bar graph, a pie chart, a column chart, or whatever makes the data easiest to understand. Put these charts and/or graphs into a collaborative whiteboard platform such as Jamboard. Create a separate panel for each graph or chart (you can see an example **here**) and include the following questions: What do you see in this graph/chart? What are people experiencing? What challenges are they facing? What needs do they have? What opportunities are presented by this data? Why are things this way?

Create a set of panels for every 2 or 3 people you have in each group so they can be split into teams for data analysis. Add one final panel for themes and further questions.

Process

Process

Part I: Introduction (5 Minutes)

Divide the team into groups of 2-3, with a staff facilitator for each group (if possible). Provide a link to the whiteboard application you are using for the data analysis process. Each facilitator should spend about 5 minutes orienting their group to what each graph or chart is showing. Explain what each axis represents and how to read the data that is presented. Make room for clarifying questions, but save any questions about what these data mean for the next section of the activity.

Note on time management: To ensure all data points will be covered, start each team on a different graph/chart (team 1 starts on graph 1, team 2 on graph 2, etc.) so even if you run late on time and each team does not get to analyze each data point, all data points will be covered.

Part II: Analysis (30 Minutes)

Following the **SHOW protocol** shown below, each facilitator will move their group through the panels of data on their whiteboard application, taking notes right on the platform. If you have a multilingual space with interpretation, make sure you have someone in charge of translating the notes on the whiteboard application in real time. Spend about 10 minutes on each panel/data point and have the group answer the following questions:

S What do you ***S***ee in the data?
H What is really ***H***appening here? (What is the unseen story behind the data?)
O What does this data tell us about ***O***ur lives or community? Does it resonate with your experience?
W ***W***hy are things this way?[1] (Why does this situation, concern, or strength exist?)

Part III: Gallery Walk (10 Minutes)

Have CRT members look through the panels from every group to see what came up in their discussions. Provide the following guiding questions to think through individually as they look through the panels (including their own):

Question 1 What word or phrase sums up this data?
Question 2 What is the essence of the story?
Question 3 Are there any things that other groups put down that surprised you? Why?

Part IV: Theme Development (15 Minutes)

Return to the full group. Have one staff member facilitate the conversation and another staff member take notes right on the whiteboard application, on the last slide created for themes.

[1] This protocol has been adapted from the SHOWED protocol, which is commonly used in Photovoice research projects.

Go through each of the 3 panels/data points and for each one, have a discussion about what words or phrases can sum up this data for the team. These will be the themes that are emerging from the quantitative data analysis process.

Follow-Up

For homework, have members of the CRT go back to the poll or survey they created (or whatever other method of quantitative data collection was used). Given what they learned through this first iteration of quantitative data analysis, ask them to think through what other data they may find useful or interesting to review. Use a feedback form (such as Google Forms) to have members of the team indicate which data points they are interested in looking at next. A sample feedback form can be found in the document **Quantitative Analysis (Survey) Feedback Form**.

Staff should use the responses to this feedback form to determine which data points to pull for the next iteration of this quantitative analysis activity.

A Note About This Being an Iterative Process

Given time constraints and capacity limitations, it may be impossible for the whole CRT to analyze every piece of data that is collected through the research portion of this project. This is where staff decisions need to be made to help the team focus on certain areas and sets of data to review. For this reason, this analysis process needs to be done more than one time – in each iteration the team builds on what they learned.

Related Resources

- **Survey Visualization and Discussion Example**
- **Data Analysis Discussion Guide**
- **Quantitative Analysis Feedback Form**
- **Conducting Research Analysis - Qualitative Data**

Conducting Research Analysis: Qualitative Data

Truly collaborative data analysis is difficult and time consuming, and poses a constant negotiation between being pragmatic within the time and capacity constraints of the project and finding ways for the Community Research Team (CRT) to truly be co-researchers. Much like in **quantitative analysis**, some level of decision making might have to happen at the staff level to narrow down the universe of data to analyze.

Qualitative data may come from a variety of research methods identified by the CRT, including but not limited to interviews, focus groups, or open-ended survey questions. To analyze all the qualitative data, the CRT may need to do this exercise several times.

Materials/Resources

1) Excerpt from interview or focus group notes/transcript (see note on preparation below)
2) **Qualitative Data Tracking Sheet** (one for each CRT member)
3) An interactive document or slides (such as Google Docs/ Google Slides) or virtual whiteboard tool (such as Jamboard or Mural) for additional note-taking
3) Virtual breakout rooms

Time Needed

60 Minutes

Process

Preparation

Facilitators pull 2-3 pages from an interview or focus group notes or transcript. Choose an excerpt where the questions are somewhat related to each other so it does not feel like a collection of disjointed thoughts but rather a more cohesive section of qualitative data. Anything more than 2-3 pages would be unwieldy to read through during this session, so do not go beyond that limit.

This interview/focus group excerpt will be used in the "Think-Pair-Share" process, described below. For this session, the full group will be working with the same excerpt.

Process

Part I: Qualitative Analysis Overview (15 Minutes)

Begin by explaining how interviews or focus groups can be analyzed:

- Close reading interview or focus group transcripts.
- Looking for patterns, commonalities, and differences between what respondents are saying.
- Sensemaking of these themes and reflecting on how they relate (or not) to CRT members' own experiences.

Share an example of a few paragraphs from an interview or focus group transcript and go through the guiding questions that will be given to the CRT, using the qualitative data tracking sheet to capture themes and illustrate how this process works.

Part II: Think-Pair-Share (45 Minutes)

Share the 2-3 page interview/focus group excerpt that you prepared and the qualitative data tracking sheet with the group, and continue into a think-pair-share activity to begin analysis.

think (15 Minutes)

Think (15 Minutes)

Provide participants 15 minutes to individually do a close read of the excerpt and take notes on the themes or patterns they see. Provide the following guiding questions that they will utilize for both the "think" and the "pair" sections of the activity, along with the qualitative data tracking sheet to help them track themes and notes. Remind them to pull specific quotes or examples where they are asked for.

Guiding Questions:

1) What do you see in these answers? Be as general or specific as you want.
2) What do you see in these responses that feels positive, promising, or like an opportunity? Use specific quotes or examples.
3) What needs or challenges do you see in these responses? Use specific quotes or examples.
4) How is this data similar to or different from your own experiences?

Facilitator's note: the responses to questions 2 (positives/opportunities) and 3 (needs/challenges) will be used to help develop district goals and indicators in future sessions, so it is particularly important that CRT members address these questions and track specific quotes or examples.

pair (15 Minutes)

Pair (15 Minutes)

Break the group into pairs, and provide 15 minutes for partners to share their thoughts on what they've read, using the guiding questions above and their responses on the qualitative data tracking sheet to structure the conversation. Where there are differences in their responses, have them explain why and discuss.

If possible, have a facilitator with each pair to probe for specific examples when these are not provided and take any additional notes for the group.

share (15 Minutes)

Share (15 Minutes)

Come back as a full team and discuss the things that stood out to each pair from this exercise for 15 minutes.

Have a facilitator guide the conversation and ask probing questions when appropriate.

Have a note taker take notes somewhere everyone can see (an interactive document or slide, or virtual whiteboard tool). Note that if this is a multilingual space, notes will have to be translated in real time in order to keep the activity accessible in terms of language.

Follow-Up

Now that the group understands how to analyze the data and identify specific quotes/examples from text and has had a chance to practice, provide a unique text to every participant so they can follow this protocol for homework.

Each member of the CRT will have their own 2-3 page excerpt to analyze, using the qualitative data tracking sheet. Again, select data excerpts that focus on a particular question or a related set of questions. Be sure to note on the excerpt which interview(s)/focus group(s) the responses are coming from so that CRT members can easily record the source on their analysis tool.

Use the same guiding questions and tracking sheet as in this session for homework, reminding folks to be specific in their responses and to pull quotes from the text where asked for. Have CRT members send facilitators their tracking sheet and any other notes they think are important before the next meeting.

Facilitators will compile the CRT's responses to questions 2 (positives/opportunities) and 3 (needs/challenges) in preparation for the session on **Developing Goals from Qualitative Data**, identifying and sorting responses by overarching topics/issue areas.

Some CRT members may have an interest in reading through a more comprehensive set of interview or focus group data beyond the excerpts they have been provided. Develop a process by which you can share the data with those who are interested.

Related Resources

- **Qualitative Data Tracking Sheet**
- **Conducting Research Analysis - Quantitative Data**
- **Developing Goals from Qualitative Data**

A Note About Academic Jargon

For members of the CRT who are new to academic research, reframing academic concepts like "coding" into more relatable concepts like "sensemaking" or "interpreting" may yield similar results without risking alienating CRT members with academic jargon. While it may be important for co-researchers to learn the language of academic research for other phases of the project, or even for their own future pursuits, the focus should be on them being able to do their own analysis in terms that make sense to them. More "traditional" academic coding processes may not be intuitive or even useful for folks who have not had academic research training.

4.2 From Analysis to Indicator Development

4.2.1

Developing Goals from Qualitative Data

The concept of an indicator can be abstract. To help the Community Research Team (CRT) develop their indicators, they must first identify desired goals for the district (i.e., what needs to change in the district based on the research findings), ideal outcomes (i.e., if their desired goal is adopted by the district, what would the outcome be), and ways to measure those ideal outcomes (i.e., what information could be gathered to determine if the district is getting close to meeting this outcome). Ultimately, this measure is used to determine an indicator.

Time Needed

2-3 Hours, depending on the number of CRT participants and amount of qualitative data to review.

Materials/Resources

1) The CRT's compiled responses to questions 2 (positives/opportunities) and 3 (needs/challenges) from the **Qualitative Data Analysis** session, including data excerpts and grouped by theme
2) **Developing District Goals** worksheet
3) Virtual breakout rooms and/or virtual whiteboard tool (such as Jamboard or Mural)

Preparation

Between the session on **Qualitative Data Analysis** and this session, facilitators will have compiled the CRT's responses to questions 2 (positives/opportunities) and 3 (needs/challenges) and grouped them by theme to prepare for the development of goals.

From this compilation, facilitators should prepare:

1) An example to use with the full CRT for Part I of the process;
2) Distinct sections from the initial qualitative analysis to assign individual CRT members for Part II of the process.

Process

Part I: Example Walk-Through (20 - 30 Minutes)

In the first part of the activity, facilitators will walk the CRT through an example demonstrating how to develop a goal from an excerpt of data.

The process begins with the data analyzed through the lens of opportunities and challenges and grouped together by theme. See an example below related to the theme of family communication (facilitators should use an example pulled from their project's interview or focus group data).

What do you see in these responses that feels **positive, promising,** or like an **opportunity**?	What specific quotes or examples show this?
Gap in knowledge about what went on at the school. Creative solution from staff.	T: We figured out there was a disconnect between the things we did at the school and what parents were in the know about, you know? So we started a simple newsletter in English and Spanish that goes out every month so people could be up to date. It has really helped with keeping parents in the know.

What **needs** or **challenges** do you see in these responses?	What specific quotes or examples show this?
Staff who communicate unclearly, or in English and not the preferred language of families.	T: One staff member here speaks Spanish, and there are a lot of families who speak Spanish. But that staff member doesn't speak Spanish when talking to parents. I don't think we're communicating well with families in any language. We're not communicating clearly. And we're not communicating in a language families understand. Some of our families speak Spanish as their second language, and maybe English as a third language.

The CRT then uses this previous analysis and supporting data to discuss this question: *Considering these strengths and opportunities, as well as needs and challenges, what are possible goals the district should work toward?* Facilitators can employ various tools (such as a virtual whiteboard tool) and/or discussion structures (like whole or break-out group discussion) depending on what works best for your team. Record the possible district goals generated by the CRT.

Opportunities & Challenges	Possible District Goals
Spanish-speaking staff.	Leverage linguistic assets in the school and district.
Staff who do not like to speak in families' home language.	
Failure to communicate clearly in any language.	Communicate with families in at least one of their home languages in a timely manner.
Sending home information at the last minute.	
Parents that are invested in knowing what is happening with their children.	

Given the opportunities and challenges in the example above, possible goals the district could work toward are: leveraging linguistic assets in the schools and district; and communicating with families in at least one of their home languages in a timely manner, knowing that they are invested and want to know what is happening. These are mapped in the table above. The CRT should only focus on what outcome they are seeking. It is not the CRT's responsibility to identify strategies for how the district will meet these goals.

Part II: Developing District Goals (Time Varies)

After walking the CRT through this example together, provide each CRT member with a copy of the **Developing District Goals** worksheet, and a set of data that has already been analyzed by opportunities and challenges and grouped by theme. ***This data may or may not be the same set of data that they analyzed in the previous sessions***. Each person should focus on one topic (or a set of closely related topics) in the data.

Each CRT member should then reflect on their analyzed set of data, and define goals to address the identified challenges and opportunities. In their individual copy of the Developing District Goals worksheet, they should record the topic (theme) that their data falls under, list their goals for the district, and include at least two excerpts of supporting evidence from the qualitative research data. Given the opportunities and challenges in the example above, possible goals the district could work toward are: leveraging linguistic assets in the schools and district; and communicating with families in at least one of their home languages in a timely manner, knowing that they are invested and want to know what is happening. These are mapped in the table above. The CRT should only focus on what outcome they are seeking. It is not the CRT's responsibility to identify strategies for how the district will meet these goals.

Follow-Up

The Developing District Goals worksheet must be completed by each CRT member before attempting to use the upcoming Outcomes and Measures tools.

A Note About Developing Goals

It can be tempting for the CRT members to jump to proposed solutions, particularly for the challenges that have been identified. Emphasize that it is not the CRT's responsibility to identify strategies for how the district will meet these goals. Rather, the CRT should focus on what outcomes they want from the district.

Related Resources

- **Conducting Research Analysis–Qualitative Data**
- **Developing District Goals** worksheet

Developing Goals from Quantitative Data

The concept of an indicator can be abstract. To help the Community Research Team (CRT) develop their indicators, they must first identify desired goals for the district (i.e., what needs to change in the district based on the research findings), ideal outcomes (i.e., if their desired goal is adopted by the district, what would the outcome be), and ways to measure those ideal outcomes (i.e., what information could be gathered to determine if the district is getting close to meeting this outcome). Ultimately, this measure is used to determine an indicator.

Time Needed

Approximately 2 hours, depending on the number of CRT participants and amount of quantitative data to review.

Materials/Resources

1) Data analysis from the **Quantitative Data Analysis** session.
2) **Developing District Goals** worksheet
3) Virtual breakout rooms and/or virtual whiteboard tool (such as Jamboard or Mural)

Preparation

Choose a survey data point/visualization and the CRT's analysis from the **Quantitative Data Analysis** session to use as an example for Part I of the process.

Prepare distinct sets of survey data points/visualizations from the **Quantitative Data Analysis** session (or quantitative data points/visualizations that have yet to be analyzed) to assign individual CRT members for Part II of the process.

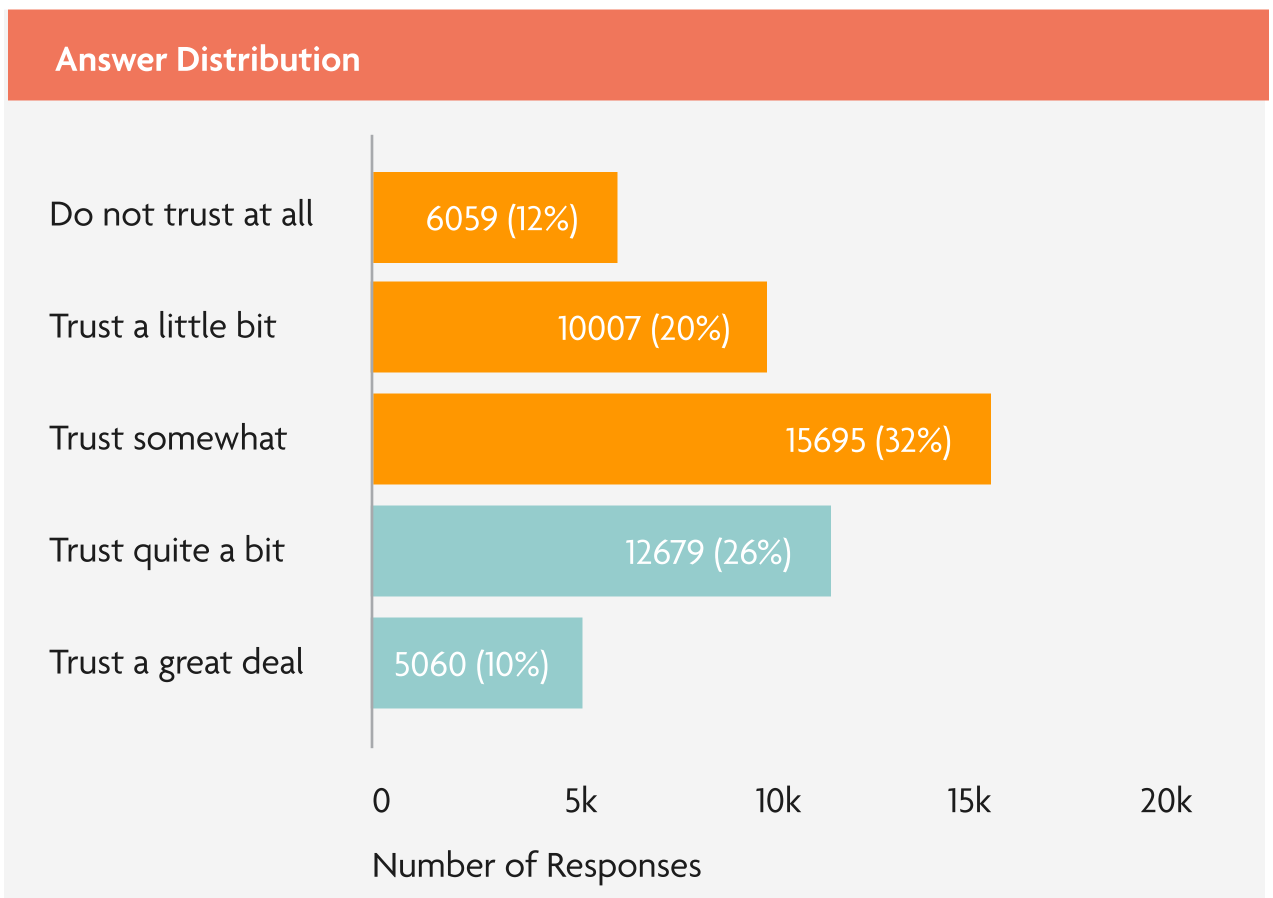
Process

Part I: Example Walk-Through (20 - 30 Minutes)

In the first part of this activity, facilitators will demonstrate how to develop a goal from an excerpt of quantitative data. An example from a web-based student survey used by a state department of education is included below, though facilitators will likely want to use an example pulled from their local project data.

Example Question: In the event of a conflict or problems, how much do you trust that your school community will hear your side of the story and take it seriously?

Example Results:



The CRT will have already analyzed the data using the following reflection questions:

- What do you see in this graph/chart?
- What is really happening with this data?
- What does this data tell us about our lives and community?
- Why are things this way?

Using their responses to the reflection questions, the CRT will next identify **challenges** and **opportunities** in the district.

For example, given that only 36% of students responded that they “trust quite a bit” or “a great deal,” there was an opportunity for the district to build student trust. A potential district goal related to this opportunity is “Students feel supported in resolving conflicts.”

Part II: Developing District Goals (60-70 minutes)

After walking the CRT members through the example, provide each CRT member with a copy of the **Developing District Goals** worksheet, and a set of quantitative data, ideally grouped by topic/theme. This data may or may not be the same set of data that they analyzed in the previous sessions.

Each CRT member should then reflect on their analyzed set of data, and define goals to address the challenges and opportunities identified in the survey results (and/or use the survey results to support goals identified from the qualitative data analysis). In their individual copy of the **Developing District Goals** worksheet, they should record the topic (theme) that their data falls under, list their goals for the district, and include as supporting evidence the related data points from the quantitative research data. Rows can be added to the worksheet if needed.

Given the opportunities and challenges in the example above, possible goals the district could work toward are: leveraging linguistic assets in the schools and district; and communicating with families in at least one of their home languages in a timely manner, knowing that they are invested and want to know what is happening. These are mapped in the table above. The CRT should only focus on what outcome they are seeking. It is not the CRT's responsibility to identify strategies for how the district will meet these goals.

Follow-Up

The **Developing District Goals** worksheet must be completed by each CRT member before attempting to use the **Outcomes and Measures** tools.

A Note About Developing Goals

It can be tempting for the CRT members to jump to proposed solutions, particularly for the challenges that have been identified. Emphasize that it is not the CRT's responsibility to identify strategies for how the district will meet these goals. Rather, the CRT should focus on what outcomes they want from the district.

Related Resources

- **Conducting Research Analysis–Quantitative Data**
- **Developing District Goals** worksheet
- **Developing Goals from Qualitative Data**

Outcomes and Measures Part I: Preparation

The Developing District Goals activity will yield a large volume of analyzed data from multiple perspectives. Intercoder consistency–the degree to which two independent researchers agree on how data has been analyzed–helps to ensure that analysis is consistent and research findings are trustworthy. Because research findings will continue to be broken apart and put together again throughout the remainder of this process, data should be reviewed and potentially re-analyzed to ensure consistency in the analysis. This analysis is time-consuming, so staff support is needed to bring disparate pieces back together in a structured way. Any data analysis conducted by staff should always be brought back to the Community Research Team (CRT) because they are closest to the data and their interpretation of the data is central to the research project.

Time Needed

Approximately 3 Hours (or more), depending on the number of CRT participants and amount of qualitative data to review.

Materials/Resources

1) Completed **Developing District Goals** worksheets from each CRT member
2) One or more resources with state or national educational equity indicator data, such as the **Monitoring Educational Equity** text (see Related Resources).

Process

Preparation

Staff should check in with each CRT member, provide support, and make sure that each person has completed the **Developing District Goals** worksheet in advance.

Process

Copy the responses recorded in each CRT member's Developing District Goals worksheet into a master table. Be sure to include the CRT member's name who analyzed the data in each row. An example of our master table is below:

Topic Big idea that the district needs to address.	**Desired Goal** What needs to change in the district based on the research findings.	**Qualitative Data to Support this Goal** Use direct quotes if possible.	**CRT Member** Who analyzed the data.	**Indicator Examples from other Sources** That are already accessible.	**Other Possible Indicator Examples** Data that are aspirational.	**Quantitative Data to Support this Goal**

The first three columns of this table mirror what is in the **Developing District Goals** worksheet. Staff should carefully review these first three columns to see if each desired goal aligns with the topic that the CRT member identified, and if the qualitative data provides supporting evidence for that goal. Try to discuss questions or concerns about potential misalignment with at least one other staff member before making changes, and make a note to share any changes with the CRT member during the working session later.

Sort the data by topic so that all rows with similar topics are grouped together. Color coding topics by theme makes it easier to keep track of groups of related data.

Use the column for "Indicator Examples from Other Sources" to capture a few possible indicators that might align with the goals. In this column, the CRT is drawing from examples of indicators used in other contexts. These need not be exhaustive, but will provide examples for the next activity in **Outcomes and Measures 2,** using the **Developing Indicators Handout.**

The "Other Possible Indicator Examples" column is helpful for brainstorming aspirational indicators based on data that is not yet (or not known to be) collected systematically at the local, state, or national level.

The final column, "Quantitative Data to Support this Goal," provides space to note any quantitative data sources that might support the desired goal (e.g., responses to survey questions). If the CRT did not collect quantitative data that relates to the example, pull data from another source, such as a statewide database.

Topic Big idea that the district needs to address.	**Desired Goal** What needs to change in the district based on the research findings.	**Qualitative Data to Support this Goal** Use direct quotes if possible.	**CRT Member** Who analyzed the data.	**Indicator Examples from other Sources** That are already accessible.	**Other Possible Indicator Examples** Data that are aspirational.	**Quantitative Data to Support this Goal**
Consistency	Services need to be the same in each school.	"I tried to get help at the new school but no one returned my calls or emails."	Reagan			
Social Workers			Chris			
Socio-Emotional Learning			Jesse			
Communi-cation with families			Jesse			
Multi-Lingual Learners			Jesse			

Use the master table to determine working groups for the next activity. For example, in the sample table above, Jesse can be assigned to a group that focuses on language justice in communication with students and families. Chris can be assigned to a group that focuses on mental health support. These decisions require reflection and intuition, drawing from the data and the rationale for how the data was analyzed.

Some topics might overlap with others, so having the raw data to refer to is helpful. For instance, the topic of consistency could refer to many things–consistency of mental health services or consistent communication. Looking at the data provided, it appears that the challenge was consistent communication. So this could be highlighted in pink, and Reagan and Jesse could work together in one group.

Reardless of the decisions made at this stage, remain open to how the CRT may perceive and want to change these categories. The goal is to structure the CRT's data so that the findings are clear, consistent, and manageable for the CRT to work with.

A Note About Involving the CRT in this Process

This tool is designed to support a small group of no more than three people in preparing for the **Outcomes and Measures Part II: Working Sessions**. Having only a few people primarily responsible for this task helps to ensure consistency in the approach to compiling and sorting the data. We recommend at least one staff member assist with this process. Depending on the capacity of the CRT, it may be necessary for staff members to take full responsibility for this task. In this case it is critical that any data analysis conducted by staff be brought back to the Community Research Team (CRT) because they are closest to the data and their interpretation of the data is central to the research project.

Related Resources

- **Developing District Goals** worksheet
- **Developing Indicators Handout**
- **Outcomes and Measures Part II: Working Sessions**
- National Academies of Sciences, Engineering, and Medicine (2019). *Monitoring Educational Equity*. Washington, DC: The National Academies Press. **https://doi.org/10.17226/25389**.

Outcomes and Measures Part II: CRT Working Sessions

With this tool, the Community Research Team (CRT) takes the next step in the process of developing equity indicators. Over the last two sessions, the CRT has used the **Developing District Goals** worksheet and the table in **Outcomes and Measures Part I** to make connections between their research data, district goals aligned to community needs and priorities, and possible indicators that could help measure progress toward meeting the goals. In this session, the CRT comes back together to hone these connections and narrow in on the measures they are interested in capturing with their indicators.

An indicator is a measure used to track progress toward objectives or monitor conditions over time. It is often a statistic but it doesn't have to be. The **Outcomes and Measures Part I** activity prepared information that will help the CRT to draw upon that work and construct their own set of community-aligned equity indicators. Today, we use the term measure, to focus on what it is we want to measure with the indicators. Later, this work will translate directly into more formal indicators. Again, this process is both time-consuming and iterative. CRTs should be ready to plan extra time for this work.

Time Needed

Approx. 2 Hours (not including time for preparation)

Materials/Resources

1) The set of district goals developed by the CRT
2) **Developing Indicators Handout**
3) Virtual breakout rooms

Process

Preparation

Facilitators should review each CRT member's set of goals from the **Developing District Goals** worksheets. See **Outcomes and Measures Part I: Preparation** for more detail. Compile and sort these goals into a manageable number of categories (3-5). Create a table for each category. Each category will ultimately get assigned to one group of CRT members. (See an example of this table in step 1 of the **Developing Indicators Handout**).

Create an example of the process for the CRT (see an example in the **Developing Indicators Handout**):

- Identify potential outcomes and measures for some of the desired goals to help the CRT understand how to develop a measure from a goal.
- Identify examples of existing indicators that relate to each category.

These examples can serve as models for how to write indicators.

Process

Invite the CRT to review and discuss the summaries created in the Developing Indicators handout. This is an opportunity to express agreement or disagreement with how the data was sorted and compiled.

Explain that the district goals will be used to help define indicators. The graphic below summarizes the link between goals, outcomes, and measures. Given the opportunities and challenges in the example above, possible goals the district could work toward are: leveraging linguistic assets in the schools and district; and communicating with families in at least one of their home languages in a timely manner, knowing that they are invested and want to know what is happening. These are mapped in the table below. The CRT should only focus on what outcome they are seeking. It is not the CRT's responsibility to identify strategies for how the district will meet these goals.

Objetivos - ¿Qué debe cambiar?		**Resultados** - ¿Qué pasa si el distrito adopta tus goles?		**Medidas** - ¿Como sabemos si el distrito està cerca de llegar a las metas?
	+		=	
Goals - What needs to change?		**Outcomes** - Result if district adopts your goal?		**Measures** - How we know if the district is close to meeting the outcome?

Explain that the CRT will create outcomes and measures for each of their goals. To decide on an *Ideal Outcome*, think about what should happen if each goal was adopted by the district. Again, it's not necessary to think about whether or not the district has the capacity to meet this outcome yet.

The final column is for possible ways to measure progress toward that outcome. These measures can use a mix of quantitative and qualitative tools. For example, some measures can be easily obtained with a survey. Other measures may require classroom observations or student feedback in narrative form. Share some prepared examples, and solicit additional ideas from the CRT.

Once everyone understands the task, sort the CRT into groups, each assigned to a specific category, to complete the handout.

Sample Topic: School Culture/Restorative Practices

Desired Goal What needs to change in the district based on the research findings?	**Ideal Outcome** If your desired goal was adopted by the district, what would the ideal outcome be?	**Measure** What information could we gather to determine if the district was getting close to meeting this outcome?
Train teachers on restorative practices and give them a curriculum that incorporates it into daily activities.	All classroom teachers trained in restorative practices and using them with fidelity.	% of teachers trained #/rate of discipline referrals (to show absence of restorative practices) Observations of teachers Student feedback on teacher practices
Students feel supported in resolving conflicts.	Students would have no behavioral referrals because they trust adults to help them, and adults actually do help them.	% favorable response on SurveyWorks question #/rate of discipline referrals

Ultimately, these measures will need to be written in the form of an indicator. Share examples of existing indicators from state and national organizations, and encourage the CRT to continue to think about which indicators, if any, might be useful for their work.

Related Resources

- **Developing District Goals Worksheet**
- **Developing Indicators Handout**
- National Academies of Sciences, Engineering, and Medicine (2019). *Monitoring Educational Equity*. Washington, DC. The National Academies Press. **https://doi.org/10.17226/25389**.

Finalizing Indicators

This tool provides guidance on how to move from indicator development to organization and presentation. Reflecting the SCORE project's process, it divides the work into three segments: preparation for this Community Research Team (CRT) meeting by organizing a "starting set" of indicators, CRT discussion of the indicators and their organization and presentation, and follow-up work to revise and refine the finalized indicators. Our process involved the full CRT most deeply in the discussion phase and employed facilitators to prepare and follow-up. But, as explained below, with more time, adjustments could be made so that the CRT plays a more direct role in initial drafts and revisions.

Time Needed

90 Minutes

Materials/Resources

1) **Developing Indicators Handout**
2) **Questions for Indicator Discussion**
3) Starting set of indicators

Preparation

Starting Set of Indicators: Facilitators, working in groups of at least two, should review each group's goals, outcomes, and measures from the **Developing Indicators Handout**, rechecking for alignment and compiling the measures into one starting set of indicators. This preparation will likely require one or more meetings before the CRT meets for the session to finalize indicators.

- Make sure the language is clear and consistent, the indicators are organized logically, and the work is translated (if working with a multilingual team).
- There are multiple ways to organize a set of indicators, and teams might select different organizational structures for internal and external use, or use one method consistently.
- One way to organize indicators is by using indicator trees, which are inspired by the work of Linda Mayoux[1]. Indicator trees can serve to extend metaphors like the River of Life and the policy river, used earlier in the process; the CRT's goals were rooted and grounded in these processes, and the indicators grew out of them. Indicator trees can help teams understand and communicate how the indicators connect to the work done throughout the research process and bring the project full circle.
- A more traditional mode of presentation, like a table, can be more practical for ongoing work with indicators, as it allows for multiple columns to break down indicators or to include additional information, like potential data sources.
- Examples of both indicator trees and a table are included below.

In our project, facilitators organized the indicators before seeking feedback from the CRT in this session, and this tool reflects that method. But if time permits, the CRT could participate directly in the initial organization of the indicators rather than facilitators completing this step.

[1]Mayoux, L. (2001) What do we want to know? Selecting indicators. Unpublished paper. Retrieved 27 May 2022, from Website: **https://gamechangenetwork.org/wp-content/uploads/2018/11/TK1_SelectingIndicators.pdf**
Carnegie, M., McKinnon, K., & Gibson, K. (2019). Creating community based indicators of gender equity: A methodology. Asia Pacific Viewpoint, 60(3), 252-266.

Indicator Tree Example

School Culture/ Restorative Practices

Ideal Outcomes

- Teachers implement restorative practices with fidelity
- Students have no behavioral referrals because they have trusted adults to help them
- Teachers trained in restorative practices

CRT Desired Goals

- Teachers given a curriculum that incorporates restorative practices into daily activities
- Students feel supported in resolving conflicts
- Teachers trained in restorative practices

Measures (Precise Indicator)

- Satisfaction with observations of teachers' classrooms
- Student feedback on teacher practices
- #/rate of discipline referrals (to show abscence of restorative practices)
- % of favorable responses on SurveyWorks questions
- % of teachers trained in restorative practices

Indicator Chart Example

School Culture/ Restorative Practices

Goals	Outcomes	Measures
School Culture and Restorative Practices		
Goal 1: Teachers given a curriculum that incorporates restorative practices into daily activities.	Teachers implement restorative practices with fidelity.	Satisfaction of observations of teachers' classrooms Student feed back on teacher practices
Goal 2: Students feel supported in resolving conflicts.	Students have no behavioral referrals because they have trusted adults to help them.	#/rate of annual discipline referrals (to show absence of restorative practices) % of favorable responses of SurveyWorks questions
Goal 3: Teachers are trained in restorative practices.	Teachers are trained in restorative practices.	% of teachers trained in restorative practices.

Process

Process

Share the starting set of indicators with the CRT, orient the group to the format, and provide time for careful reading and clarifying questions. Prioritize CRT understanding of the structure and meaning of the indicators during this part of the meeting, and ensure that at least one facilitator tracks initial accessibility challenges with the indicators so that these can be addressed in revisions.

Facilitate a discussion, using the **Questions for Indicator Discussion** as a guide. Designate at least one facilitator to take notes in the guide as the CRT offers feedback on each set of indicators.

Make sure there is time in this meeting for CRT members to reflect briefly on the work they have done and its significance for them personally and for their communities. There is extended time for reflection on the entire process later, but a few minutes at this phase of the work can be a valuable acknowledgement of the team's work.

Follow-Up

After this session, facilitators can revise the indicators using CRT feedback. If time permits, offer CRT members the opportunity to participate directly in the next round of revisions based on this discussion.

In Phase V of this project, CRT Members may continue to refine and finalize the indicators if needed.

Related Resources

- **Questions for Indicator Discussion**
- **What do we want to know?**
  Selecting Indicators by Linda Mayoux.
- For a detailed explanation of how Mayoux's framework was developed and applied by other researchers, see Carnegie, M., McKinnon, K., & Gibson, K. (2019). Creating community-based indicators of gender equity: A methodology. Asia Pacific Viewpoint, 60(3), 252-266.

A Note about Unintended Consequences

The final question in the indicator discussion resource asks CRT members to think about unintended consequences. This important step requires "productive paranoia." It may help CRT members to have an example; for instance, you could share how an indicator meant to measure student achievement could unintentionally encourage schools to spend time on test preparation rather than on more student-centered learning.

4.3.1

From Indicators to Implementation Brainstorm

As SCORE work begins to transition to the Implementation phase, it is useful to have the Community Research Team (CRT) begin to think about how and by whom (in both the school district and community) their developed indicators might be used. This activity lays the foundation for eventual power mapping, strategy development, and outreach as the indicators gain life beyond the CRT.

Time Needed

25 Minutes

Materials/Resources

1) Virtual breakout rooms
2) Interactive slides (such as Google Slides) or virtual whiteboard tool (such as Jamboard or Mural)

Process

Preparation

Using a collaborative whiteboard tool, prepare two slides: one focused on the school district, and one focused on the community.

On the school district slide, include the following prompt questions:

- *Who* in the school system might be interested in these indicators (or a particular section of indicators)? Can be individuals or groups.
- *Why* might they be interested in them? *How* might they be able to use these indicators?

On the community slide, include the following prompt questions:

- *Who* in the community might be interested in these indicators (or a particular section of indicators)? Think about groups or organizations.
- *Why* might they be interested in them? *How* might they be able to use these indicators?

Process

Part I: Review - What Indicators Do and Don't Do (5 Minutes)

Begin with a few short reminders that help to frame how equity indicators can be used.

- Give us information/data
- Measure and monitor something over time
- Let us know if something has changed or progress is being made
- Tell us how the system is functioning
- Guard against superficial actions
- Help hold schools or the school district accountable
- Bring attention to disparities or areas of need

Equity indicators are *not* recommendations or solutions, BUT they can give us data or information to:

- Inform decisions and changes in policy and practice
- Support advocacy and mobilization for needed changes

If you have a local example of how equity data or indicators led to changes in policy or practices, share with the group.

Part II: Brainstorm (20 Minutes)

Share the slides prepared for the brainstorming activity.

Split the group into pairs or triads for 10 minutes to brainstorm together and add their ideas to the two slides. Encourage them to think about eventual outreach and be as specific as possible - for example, "[school district] parents" is very broad. Are there specific groups of parents or parent organizations that can be named? For groups of stakeholders who may not fall neatly into either category, use your best judgment. For example, elected officials can be included in the "community" category with a note about their role that allows them to be pulled out for special consideration as an outreach plan is being developed.

Bring the full group together for 10 minutes to share out highlights of their discussions and any ideas they'd like to lift up. The full range of ideas captured on the whiteboard tool can be taken into the next phase of the work to inform a more concrete outreach plan.

Related Resources

- Defining Your Outreach Strategy: District and Community
- Developing Outreach Messaging (Head, Heart, Feet)
- Outreach Mapping
- Preparing Information Sessions

Participant Reflection

As the initial phases of SCORE are coming to a close, it is important to give Community Research Team (CRT) members time to reflect on their experiences with the project. This not only contributes to a sense of closure for individuals, but gives staff facilitators information about how well participant experience matches with project goals, which can inform future iterations of SCORE.

Time Needed

35 Minutes

Materials/Resources

1) Interactive slides (such as Google Slides) or a virtual whiteboard tool (such as Jamboard or Mural)

Preparation

On interactive slides or a virtual whiteboard tool, prepare a series of slides, each of which contains a single reflective prompt question, such as:

- What are you most proud of from the SCORE project?
- What do you think is important about the SCORE project and the indicators we've created?
- What from SCORE will you take into other areas of your life?
- What do you most appreciate about the people who have been part of SCORE?
- What are your hopes for what happens next?

If you have documented early reflections from an activity such as **Motivations and Hopes**, it may be useful to include these on a separate slide so that participants can be reminded of their hopes and expectations when they first began the project.

Process

Part I: Individual Reflection (15 Minutes)

Share the interactive slides with reflective prompt questions (detailed in preparation, above).

Give participants about 15 minutes to individually respond to the prompt questions. Encourage the participants to start with the one or two prompts that most call to them, and then move to as many others as they have time for. There is no expectation to respond to all of the questions. Participants can include their initials if they're comfortable being identified, or leave anonymous contributions.

While participants contribute to the whiteboard, play music if possible.

Part II: Group Sharing (15 Minutes)

When the full group is back together, ask each person to share one highlight or reflection. This can be a response to one of the prompt questions, or anything else that they'd like to highlight about their SCORE experience. Make sure that everyone shares - it is important to hear each participant's voice as the initial phases of the SCORE work come to a close.

Part III: Staff Sharing and Appreciations (5 Minutes)

Depending on the time you have for this activity, individual staff can share a final reflection or appreciation, or one representative may share a summary of staff reflections that can be collected prior to the meeting. Prompts for staff reflection might include:

- What did you learn from working with the Community Research Team?
- What do you most appreciate about working with the Community Research Team?

Related Resources

- **Motivations and Hopes Tool**

Follow-Up

While this activity provides a snapshot of CRT experiences as well as an opportunity to process the end of the initial project phases collectively, staff should consider more in-depth follow-up interviews or conversations to 1) get more specific information from each participant; 2) allow participants to express thoughts, experiences, or ideas that they might not be comfortable sharing in the full group.

Suggested follow-up interview questions include:

- When you look back on this project, how do you feel about what you have accomplished?
- What specific skills have you gained from this project?
- What were the benefits and/or challenges of being part of an intergenerational project?
- Is there more that you wish you could have done during this project?
- What challenges did you encounter during this project?
- Was there anything that we could have done differently to help with these challenges?
- What do you think will be the impact of this project in [your community]? What difference will it make? What difference can it make?
- What do you think might get in the way?
- What did we do to keep you coming back to meetings for 10 months?

PHASE V

Implementation

In this final phase of the SCORE process, Community Research Team members work alongside project staff to bring the SCORE indicators to the wider community. This entails crafting public products and/or tools to present the SCORE indicators and related data, engaging in outreach and advocacy, and building buy-in and ownership at the school system and community levels for the implementation and use of the SCORE indicators. While the tools in Phase V are presented in three distinct sections, they do not have to be used sequentially, and in fact you may find the need to tackle activities on parallel tracks, or move back and forth between the sections to complete the work needed in a reasonable timeline.

Indicator Refinement and SCOREcard Development: Tools in this phase lead project facilitators and Community Research Team members through a process to continue refining SCORE indicators (if needed) and to develop a tool – an equity SCOREcard – to bring the team's work to the public. Throughout the tools in this section, there are opportunities for the Community Research Team to build leadership skills as well as develop greater ownership of the SCORE indicators and SCOREcard.

Outreach, Engagement, and Advocacy: These tools focus on connecting with individuals, groups, and organizations in the community and school system to share both the purpose and the outcomes of the SCORE project. From initial messaging to the planning of community SCOREcard launch events, these tools drive toward the SCOREcard being not just a one-off product, but a resource that can support ongoing activism, advocacy, organizing, and educational improvement. Contexts for sites engaging in a SCORE process may differ greatly, and the support and engagement (or lack thereof) of the school system is a major variable to consider. The "Defining Your Outreach Strategy" tool that leads off this section offers discussion points that can help to assess your relationships with both school system and community stakeholders and customize an outreach plan that works for your context.

In the Providence SCORE pilot, Phases I - IV of SCORE lasted for the duration of the Community Research Team's original commitment to the project. We thus recruited four SCORE Fellows - parent and youth leaders who were interested in working on the implementation phase and extended their commitment to the project. However, it is also possible for Phase V to be conducted with the full Community Research Team, and for overall consistency the tools in this phase reference the Community Research Team rather than SCORE Fellows. Your context and timeline will dictate who will be engaged in this phase, and the tools are written to be flexible in terms of the number of youth and family leaders involved.

This toolkit is a living document. As we continue to learn from SCORE in new sites, tools in all phases may be edited, added, or even removed as we continue to learn best practices for conducting SCORE in different communities and educational contexts.

Index of Phase V Tools

5.1 Indicator Refinement and SCOREcard Development

5.1.1

Revising and Refining Indicators

In Phase IV of SCORE, the Community Research Team (CRT) worked in a step-by-step process to develop goals for the school district, ideal outcomes that they would like to see, and ultimately indicators to measure progress toward those outcomes. At the completion of Phase IV, indicators may be finalized to the group's satisfaction and not need further revision or refinement. However, there may be circumstances where the indicators need more work, and/or a "deep-dive" process to help CRT members build more familiarity with and ownership of the indicators as they begin to move into the development of tools or products that make the indicators public, and outreach to community and/or school district individuals and groups.

The following tool provides a process for doing so that also builds CRT members' leadership and helps to practice presentation skills.

Time Needed

Varies depending on the number of indicators, indicator topic areas, and CRT members. This is an activity that may be spread over multiple CRT meetings and/or require CRT members to meet on their own in small groups.

Materials/Resources

1) Review Questions Guide either on slides or a document for CRT members to refer back to
2) Indicator Revision Spreadsheet or Chart
3) Virtual Breakout Rooms

Preparation

Prepare a chart or Indicator Revision Spreadsheet that includes the group's goals, outcomes, and indicators, separated by topic area, as well as the review questions. See sample **Indicator Revision Spreadsheet**, in which topic areas are included on separate tabs for ease of small group reviewing.

If possible, staff should fill out the "Data Availability" column on the Indicator Revision Spreadsheet, based on knowledge or best guesses of: 1) what data related to indicators is publicly available; 2) what is not public but is likely collected by the school district and can be requested; and 3) what is likely not currently being collected and thus is aspirational.

Process

Part I: Activity Introduction and Practice Review Process (35-40 Minutes)

Introduce the purpose of the activity, and share a link to the **Indicator Revision Spreadsheet** pre-populated with the group's goals, outcomes, indicators, and review questions. Note that this process will have CRT members take a "deep-dive" to review each indicator individually.

Walk through the review questions that CRT members will have to answer. Share these on a slide or document so that CRT members can refer back to them when reviewing indicators on their own.

The main review questions for each indicator are listed below - you can edit or add additional review questions as needed.

Question 1: Is this indicator clear? If unclear, what questions does it raise?
Question 2: Is this indicator specific enough? If it's too broad, what's the problem?
Question 3: Does the indicator give the community information they can use to make positive change?
Question 4: What is the data availability for this indicator (pre-populated by project staff)? Is data for this indicator 1) publicly available; 2) not publicly available, but likely being collected and can be requested; 3) aspirational, and likely not currently being collected?
Question 5: What is the level of priority for this indicator and data? Is it: 1) of the highest immediate importance; 2) giving supporting information but less urgent; 3) giving useful information, but can wait or be part of a longer-term goal?
Question 6: A column for notes is included to capture anything that falls outside of the review questions (such as noting two similar indicators that could be combined), or to add additional context or information.

For Question 5 on "level of priority," it may be worth noting that the indicators that the CRT identifies as the most important may not always be the ones that have available or requestable data. This is okay, as it can signal to the team areas where they might want to push the district to start collecting data, or even develop a community tool to collect data. It also gives information about the extent to which data is being collected overall in areas that are important to the community.

After the CRT has a chance to **ask clarifying questions**, project facilitators lead the CRT through a full group practice of the review process for a few indicators, with a staff member capturing notes on the **Indicator Revision Spreadsheet**. Facilitators should pre-select the indicators for the practice review to demonstrate different situations that the CRT members may face - for example, one indicator that is very clear and specific, and one indicator that is still vague and needs more detail.

It's less important that the group get through a particular number of indicators - rather, the goal is to give CRT members an opportunity to practice the review process, ensure that they understand the review questions, and practice coming to consensus if there are areas of disagreement.

Part II: Independent Review (Time Varies, 60-120 Minutes)

Following the practice review, recruit CRT volunteers to work in pairs or triads to complete the indicator review. Depending on the number of indicator topic areas, individual indicators, and CRT members, the pairs/triads may take on one or two topic areas.

The Pairs/Triads Will Be Expected To:

1) Complete the **Indicator Revision Spreadsheet** for the indicators in their topic area(s);
2) Be prepared to share the results of their review to the rest of the group.

The independent indicator review can be done as homework (with pairs/triads scheduling time to meet together) or as part of a CRT meeting. Depending on your context and the comfort of the CRT members, you may want to have staff facilitators available to support the independent review process.

Part III: Presentation (Time Varies, 60-120 Minutes)

Prior to pairs/triads presenting their work, do a quick debrief on the indicator review process. **Prompt questions may include**: "How did the indicator revision process go for you?" and "What was exciting about it? What was challenging?"

CRT pairs/triads will present the results of their review to the rest of the CRT for feedback. If you have limited time or a large number of indicators, you may want to streamline the process by asking presenters to highlight the following in their presentations:

- Where indicators need to be changed for clarity/specificity.
- Any areas where they got stuck or disagreed, or group feedback would be helpful.
- Their highest priority indicators.

The rest of the CRT will then give feedback on what they've heard. Project staff should capture feedback in the "notes" column of the **Indicator Revision Spreadsheet**. Suggested prompts for feedback may include:

- Anything that is unclear.
- Areas where you disagree (priority rating, clarity/specificity, etc).
- Areas where you have additional knowledge or information that might be helpful.

Project facilitators can decide how often they want to pause for feedback - feedback after each individual indicator might take more time than the group has, while waiting until after all the indicators in a topic area have been presented could overwhelm listeners. Pausing for feedback after three or four indicators have been presented may strike the right balance.

If and where there are areas of disagreement, facilitators can try to move the group to consensus. If consensus can't be reached, make a note on the **Indicator Revision Spreadsheet** so that the topic can be revisited later.

Follow-Up

Following the indicator review presentations, project staff take the review information, captured on the **Indicator Revision Spreadsheet**, and make specific edits and revisions to the indicators in accordance with the feedback given.

The full set of edited indicators should be taken back to the CRT for another review and opportunity to give feedback or make further refinements, and revisit any areas of disagreement where the group still needs to come to consensus. The purpose of this is to ensure that the indicators are representative of the CRT's ideas, and that the CRT truly owns them. A simple voting process (such as thumbs up/ thumbs down) can be used to get the CRT's approval on the revisions to each indicator, or signal where more work is needed.

At the end of this process, the final list of indicators will both guide data collection and ultimately be included in the SCOREcard.

Related Resources

- **Indicator Review Questions Guide** (Slides)
- **Indicator Revision Spreadsheet**
- **Finalizing Indicators Tool**

Identifying Shared Experiences

With the fairly technical work that the Community Research Team (CRT) is doing to finalize indicators, it's important not to lose sight of why the indicator topic areas – which represent the CRT's equity priorities – were chosen. The River of Life process in Phase I of SCORE generated these equity priorities based on the CRT's assessment of the needs, challenges, and opportunities in their current education landscape, as well as their future vision for educational equity in the school district. This process was not just an intellectual exercise, but personal to CRT members, and rooted in their own experiences. As the CRT begins to think about making their work public through SCOREcard development and community outreach, this activity will help to re-ground members in their connection to the equity priorities, and ultimately to make a compelling case as to why and how the resulting indicators matter to the community.

Time Needed

40-45 Minutes

Materials/Resources

1) Interactive slides (such as Google Slides) or virtual whiteboard tool (such as Jamboard or Mural), with Indicator Topics/Equity Priority Areas pre-populated. See **Shared Experiences Jamboard** for an example.
2) Virtual Breakout Rooms

Process

Introduce the activity, noting how it will connect to outreach efforts and messaging.

Share instructions, and the link to the interactive slides or virtual whiteboard. The activity is structured as a **think/pair/share**, with the following prompts:

Think (5 Minutes): Think about experiences that really impacted you in our [number of] indicator topic areas. Write about these experiences on virtual sticky notes, and post them into the related indicator topic area. Write as many as you want. Try to think of at least one in each topic area.

Pair (15 Minutes): Divide the group into pairs, placing them in virtual breakout rooms. Each pair should share more in depth about what they wrote. Why and how did this experience have an impact on you? How has it made you think about your educational experience as a whole?

Share (20 Minutes): Bring the full group back together to review the virtual sticky notes, discuss highlights from their pair conversations, and begin to identify themes across what CRT members shared. Prompt questions may include:

- What stands out for you on the [virtual whiteboard]?
- What surprised you?
- Did something someone else wrote resonate with you? Why?
- Is there something that surprised you by not being there?

Have a project staff member capture notes from the "share" discussion. Note that the group can return to these shared experiences as they begin to develop messaging for outreach.

Follow-Up

If not done within the meeting, project staff should review the virtual sticky notes and documented notes from the "share" portion of the activity and identify/summarize shared themes.

These summarized themes should be shared with the CRT, and referred back to during additional activities related to messaging and outreach.

Related Resources

- Shared Experiences Whiteboard Sample
- River of Life Tool

SCOREcard Outlining and Design

Once SCORE indicators are finalized, the Community Research Team (CRT) and project staff can transition to thinking about what they want to present publicly, and how to do so. For the Providence SCORE pilot, the CRT and staff developed the Providence SCOREcard - a publicly available tool (shared via an interactive website as well as a PDF summary) designed to present the identified priorities for educational equity, related indicators and available data, and context about the project and indicator topic areas. The ultimate goal of the SCOREcard is to assess the school district on measures of educational and racial equity that the community identifies as important. In the process described in this tool, CRT members use a "jigsaw"-like process to review existing indicator tools and frameworks, and spark their own ideas of what they would like to include or avoid in their own SCOREcard (or similar tool). The format possibilities for a public tool (for example, an interactive web-based tool, a report formatted by someone with design skills, a simple report) will likely vary depending on context, capacity, and financial resources, and this is something that should be shared with the CRT early to manage expectations.

Time Needed

45-60 Minutes for Preparation (CRT members)

60 Minutes for Presentation

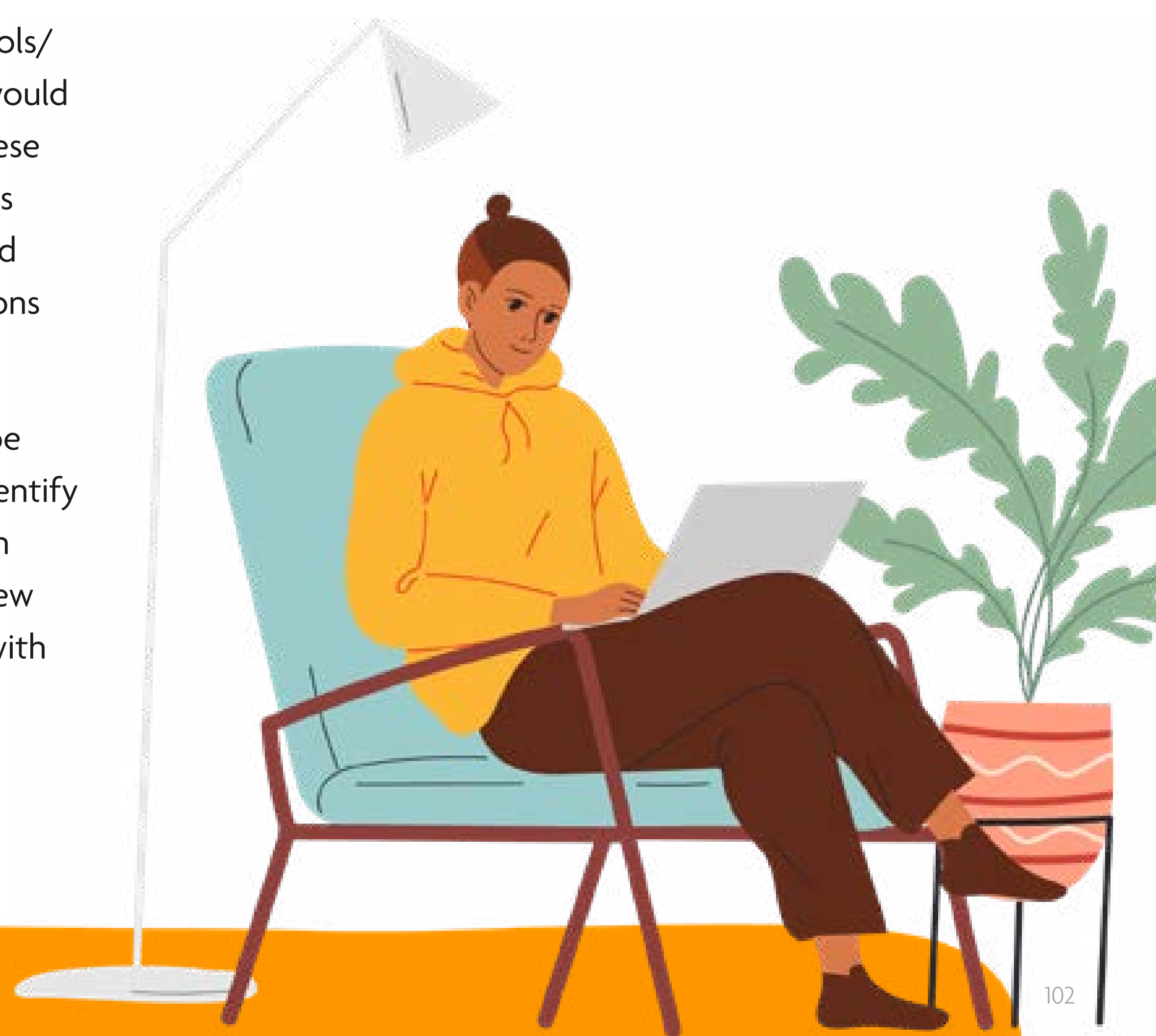
Materials/Resources

1) 3-5 existing equity indicator tools or resources (see suggestions in "Related Resources" below)
2) **Resource Review Instruction Sheet** with recommended reading for each tool/resource
3) **Resource Review Notes** document with prompt questions

Preparation

Project staff review existing equity indicator tools/resources and choose 3-5 examples that they would like CRT members to review independently. These independent reviews can be done by individuals or in pairs depending on the size of the CRT and number of identified resources. Some suggestions are listed below under "**Related Resources.**"

Given that these kinds of tools/resources can be quite lengthy, project staff may also want to identify "recommended reading" for each resource, with the goal of keeping the time necessary for review to an hour or less. A sample instruction sheet with recommended reading can be found on the **Resource Review Instruction Sheet**.



Process

Process

Part I: Individual Indicator Review (45-60 Minutes)

This process is a variation on a "jigsaw" activity, which is designed to help groups efficiently review multiple resources or materials by dividing up content into manageable pieces, and having individuals or small groups become "experts" on different resources and share what they learned with others.

CRT individuals or pairs are assigned one equity indicator tool/resource to review, and will be expected to present their thoughts on the tool/resource in a future meeting. To help CRT members with their review, share with each individual or pair: 1) a link to or download of the assigned resource; 2) the instruction sheet with recommended reading; 3) a notes document with prompt questions to capture their thoughts and ideas as they review (see linked samples in this protocol). During their review, CRT members should reflect on both content (what's in the tool and how it's written) as well as format (how it's presented/structured). This individual/pair review can be done as homework, or during a working meeting.

CRT members are welcome but not required to read beyond what's recommended.

Project staff should be available to support with questions and tool navigation.

Part II: Presentation (60 Minutes)

Each individual or pair has about ten minutes to share information about their assigned tool/resource, as well as their thoughts from review, using the **Prompt Questions** below, as well as in the **Resource Review Notes** document.

- Share the name and a brief overview of the indicator tool you reviewed.
- What did you like about this tool (overall, or specific parts)? Why?
- What didn't you like about this tool (overall or specific parts)? Why?
- Are there elements of this tool that you would like to see adapted for our SCOREcard?

As they are presenting, CRT members may want to share their screens (or have project facilitators do so) so that other group members can see the elements that they're talking about firsthand.

After each presentation, give two to three minutes for clarifying questions by others in the group and answers from presenters.

Once all presentations are finished, facilitators lead a debrief/discussion with the group, using the following **Prompts**:

- What did you hear from other presentations that was interesting to you or that you were excited about for our SCOREcard?
- Are there elements that were missing? (Project staff can mention promising elements they've seen in other resources here.)

Project staff should take notes during the presentation, question and answer period, and debrief.

Review next steps, outlined in the Follow-Up section below, with the CRT.

Follow-Up

Using the notes from the presentations and/or the **Resource Review Notes** taken by the CRT reviewers, project staff compile a list of the elements or components that CRT members liked and would like to see adapted for their SCOREcard. These can be both content and design elements. Project staff may also want to add any components from other resources they've reviewed that they think should be considered. This list of potential SCOREcard elements is the beginning of an outline for the SCOREcard. See an example of potential SCOREcard elements at the end of this document.

If needed, at a future meeting facilitators can organize a process in which CRT members are asked to vote on the SCOREcard elements that they want to include or not include, from which an outline can be finalized.

Once the outline is finalized, project staff will need to make a plan for how the SCOREcard will be completed and designed. Some questions to consider include:

- What is your timeline for producing the SCOREcard?
- Who can take on the writing of content of the various pieces of the SCOREcard (such as the introduction and overview of indicator topic areas)? What pieces will project staff lead? What will CRT members lead, and how will you determine their interest in contributing?
- Who will collect or request data for the indicators? Who will design the charts, graphs, or other visuals that present the data?
- Who will design or format the SCOREcard? Is there design capacity among project staff or CRT members? If not, are there resources to hire a designer (or can you find someone to work pro-bono)? Can you create (and do you want) a web-based SCOREcard, downloadable PDF, and/or printed report?

A Note About Data Collection

As noted in the **Revising and Refining Indicators** tool, the data for indicators identified in your SCORE process may be publicly available and easily collected, not public but able to be requested from the school district or other source, or aspirational (not currently being collected). You will likely have a combination of all three. Data request processes may also take time. We encourage you to see the SCOREcard as a living document in which data can be added and updated in an ongoing fashion, even if it is received after the SCOREcard's public launch. It will be helpful to note in the SCOREcard where and why certain data are missing, along with the case for greater school district collection and/or transparency of data in the indicator areas that the community has identified as important.

Related Resources

- Existing equity indicator tools/resources:
  - **Bay Area Equity Atlas**
  - **Rhode Island Kids Count Factbook**
  - **St. Louis Equity Indicators Project**
  - **Strive Together Guide to Racial and Ethnic Equity Systems Indicators**
  - **Resource Review Instruction Sheet**
  - **Resource Review Notes**

Sample SCOREcard Elements Outline

SCOREcard Elements Outline Sample

Section	Element	Description	Examples
[Name of] Existing Report/Website	Clear charge/overview/ background of the project	Description of the info we were trying to get with the SCORE project and why	Existing Report
[Name of] Existing Report/Website	"About this guide" section + video	Overview of the SCOREcard that helps readers understand what's included and how to read/understand it	Existing Report
[Name of] Existing Report/Website	How organizations/ individuals can use this tool	Suggestions for how the SCOREcard can be used for advocacy/organizing (by groups or individuals)	Existing Report
[Name of] Existing Report/Website	Indicator chart with simple visuals + quick links	Gives an overview of main indicator areas with links to those sections/more specific info	Existing Report
[Name of] Existing Report/Website	Overview of each of main indicator section	Brief overview/description of our main indicator areas	Existing Report
[Name of] Existing Report/Website	Indicators and data where available	Include analysis: information on why data is significant, and what metrics are missing and why. Include data sources	Existing Report
[Name of] Existing Report/Website	Definitions	Explanation of terms used that people may not be familiar with	Existing Report
[Name of] Existing Report/Website	Research briefs or fact sheets	Option to "learn more" about main indicator areas via links to accessible research briefs/ fact sheets	Existing Report
[Name of] Existing Report/Website	Community testimonials on why indicator areas are important	Brief testimonials/quotes from CRT members or other students/parents/educators on why this matters to the community	Existing Report
[Name of] Existing Report/Website	Score or rating for indicators		Existing Report
[Name of] Existing Report/Website	Data collection tool/ community survey	If there is data we know we'll need to collect ourselves, incorporate a survey tool	Existing Report
[Name of] Existing Report/Website	Colorful graphics		Existing Report
[Name of] Existing Report/Website	Real community photos (instead of stock photos)		Existing Report

5.2.1

Defining Your Outreach Strategy: District and Community

As noted in the introduction to this toolkit, SCORE projects may take place in a variety of contexts. One variable that will have a considerable impact is the nature of the relationship with the school district. There are different implications for the project, outreach process, and overall impact if you're working with a school district that is invested in SCORE and chooses to be a supportive partner, versus a school district that historically has not been receptive (or has even been oppositional) to community leadership, advocacy, and decision-making. In either context, but especially the latter, it will be important to develop strategies for outreach to the community - individuals as well as grassroots advocacy and organizing groups. It is likely that the identified equity priorities and indicator topic areas align with issues being faced by students and families, as well as advocacy and organizing campaigns being led by community based organizations. These groups can not only use the data found in a SCOREcard, but be part of the effort to advocate for the district's adoption of the SCORE indicators and increased data collection and transparency in the community's equity priority areas.

The following questions are designed to help you assess your district and community contexts, and inform strategy for how you want to structure your outreach efforts. A discussion of these questions can be conducted by project staff, or with the Community Research Team (CRT), and will help to inform how you approach ongoing outreach planning and efforts outlined in the remaining tools in this section.

Outreach Questions

School District Questions

- Has the school district entered into a formal or informal partnership with the SCORE project? If yes, does this include data sharing?
- Has the school district shown interest or lack of interest in SCORE? How has the district historically responded to community leadership, advocacy, and organizing efforts?
- What has communication with the school district (if any) been like throughout the project? Who has been our key contact(s)?
- Who are the key players in the district who connect to SCORE or our indicator topic areas (for example, Chief Equity Officer, Family Engagement Specialist)? Are there key players outside of district leadership who could play this role (for example, Teachers Union Representatives, other groups of educators)? Do we have existing connections with them? Do we consider them to be allies or potential allies? Do they have decision-making authority?
- Are there school board representatives or state board of education representatives who may be interested in or advocate for SCORE? What level of decision-making authority do they have? Do we have existing connections with any board members?
- Given the answers to these questions, how should outreach efforts be directed toward the school district?
- If there is no district-level buy-in, could individual schools pilot portions of the SCOREcard?

Community Questions

- Does our community have strong educational advocacy or organizing groups? Does their work align with the SCORE process and at least one of our indicator topic areas?
- How many of these groups are grassroots (versus “grasstops”) organizations, working directly with student and family leaders?
- Which/how many of these groups are equity-oriented and share our values?
- With which groups do we have existing connections or partnerships?
- Which elected officials other than board members (such as city council members, state senators and representatives) are aligned with our values and may take an interest in SCORE? Do we have existing connections? What kind of influence (if any) do they have on the school district?
- Given the answers to these questions, how should outreach efforts be directed toward the community?

Developing Outreach Messaging: Head, Heart, Feet

As the Community Research Team (CRT) moves into outreach planning, this activity offers an opportunity to brainstorm key messaging points through a modified "Head, Heart, Feet" protocol. These messaging points include a combination of CRT members' personal connections to the work, description of the SCORE work and why it's important, and asks of the community and/or district audiences to whom outreach is directed. The key points developed in this activity can serve as a foundation and be expanded upon as the CRT and project staff begin communicating about SCORE publicly – in messaging, conversations, and even the SCOREcard itself.

Time Needed

45-55 Minutes

Materials/Resources

1) Interactive slides (such as Google Slides) or virtual whiteboard tool (such as Jamboard or Mural), with "Head, Heart, Feet" prompts and space for notes. An example can be found in the **Head, Heart, Feet Messaging Slides**.

Process

Process

Introduction (5 Minutes)

Share the purpose of this activity, which includes brainstorming for what the group wants to include or highlight in public messaging, conversations, and products for SCORE.

Introduce the adaptation of the "**Head, Heart, and Feet**" activity. For our purposes, the Head will represent our individual values and ideals connected to SCORE; the Heart will be the SCORE work and why it's important (the heart of the project); and Feet will be the actions we're asking others to take. Share the link to the interactive slides or virtual whiteboard.

Head (10 Minutes)

Individually, have CRT members answer the following prompts and write their responses on the slides or virtual whiteboard:

Question 1: What part of your identity and values brought you to this project?
Question 2: Why are you interested in doing the SCORE work? What experiences or people inspired you to take part in this project?

If time permits, ask for a few volunteers to share their responses.

Heart (15 Minutes)

As a full group, have CRT members discuss the following prompts. A project staff member should take notes on the slide or whiteboard so everyone can see.

Question 1: What is the SCORE work?
Question 2: How does it connect to your own personal values?
Question 3: Why is this work important? Who is it for? What impact do you think this work can have?

Feet (15-25 Minutes)

As a full group or in two small groups, have CRT members discuss the following prompts. Have a project staff member or CRT volunteer take notes on the slide(s) or whiteboard so others can see.

Question 1: When conducting outreach for SCORE, think of how your asks may be different depending on who you're talking to. What would you ask from those in the school system? In the community?
Question 2: How can the group(s)/individual(s) (maybe based on their connections) help you with your ask?

Remind participants to think broadly about school system and community groups or stakeholders. There will be an opportunity in the near future to talk about how to outreach to specific individuals or organizations.

If you have split participants into two small groups, take about ten minutes to share highlights from their conversations.

Follow-Up

Following the meeting, project staff summarize the notes in each of the head, heart, and feet sections, moving toward the crafting of cohesive messages for outreach. These summaries, along with a link to the original notes, are shared with the CRT for review, revision, and feedback.

Return to these summaries as more detailed outreach planning continues.

Related Resources

- Head, Heart, Feet Messaging Slides
- Outreach Mapping
- Preparing Information Sessions

Outreach Mapping

Before the Community Research Team (CRT) starts doing outreach, it is important for them to map out who key stakeholders are that could amplify the work that they are doing and support the implementation of the SCOREcard. This kind of mapping should happen both for community stakeholders as well as district stakeholders. For the community, these stakeholders may represent very different roles, such as elected officials, community organizations, coalitions, or even individuals who may hold a certain level of influence. District stakeholders may include educators, support staff, school building leadership, district leadership, or even Department of Education staff.

This activity, adapted from the **SCOPE PowerTools power mapping exercise**, helps the CRT map out where these stakeholders are in terms of their power to influence change in the district and the possibility of them supporting the CRT's work. While this activity is based on the CRT's perception of where these stakeholders are, and where they are mapped may change once outreach starts, mapping stakeholders for outreach can help inform the CRT about who they should prioritize and what the best way to reach out to them may be.

Time Needed

1 Hour

Materials/Resources

1) Interactive slides (such as Google Slides) or a virtual whiteboard tool (such as Jamboard or Mural), with a grid to map stakeholders' level of influence and support.

Preparation

On a virtual whiteboard tool such as Mural or Jamboard, create a grid with two axes.
The vertical axis denotes the level of influence stakeholders may have to change things in your school district. Have the following labels starting from the bottom and continuing up:

- 0: Not on the radar
- 2: Can get attention
- 4: Taken into account
- 6: Major influence
- 8: Active part in decision making
- 10: Decisive decision making power or influence

The horizontal axis denotes how supportive these stakeholders may be of the work the CRT has been doing and the SCOREcard. Have the following labels starting from the left and continuing to the right:

- Neutral
- Inclined toward
- Active supporter
- "Die-hard"

Below the grid, include sticky notes with different colors and/or shapes for each of the following categories:

- Community organizations
- Coalitions
- Elected Officials
- Individuals

If the CRT has completed some preliminary stakeholder mapping in the **From Indicators to Implementation** session, write those stakeholders into the sticky notes so they are ready to be mapped.

You can find an example created in Mural titled **Outreach Mapping - Community**.

Process

Introduction (5 Minutes)

Share the purpose of this activity, which includes mapping community stakeholders to figure out their level of influence and level of support for the work the CRT is doing and the SCOREcard.

Introduce the Outreach Map to the CRT, explaining what the two axes mean.

If some stakeholder mapping was done in a previous session, refresh the CRT on what community organizations, coalitions, elected officials and/or individuals they have already identified.

Stakeholder Identification (10 Minutes)

Ask the CRT what stakeholders they think may be important in their outreach. Have them think about stakeholders that they can assume would be at least neutral in their support of the CRT's work.

As CRT members list stakeholders, write them into the appropriate sticky note. Ask each CRT member to briefly explain why they think this particular stakeholder is a good fit for outreach.

Note that you may not end up with an exhaustive list, and this map should be updated throughout the outreach and advocacy phase.

Stakeholder Mapping (45 Minutes)

Once the CRT has come up with a list of community stakeholders, start mapping them onto the grid.

Use the following guiding questions to have the group think of where the stakeholder should be placed on the map:

- What level of influence do you think this stakeholder may have to change things in the district?
- How supportive of the SCOREcard and the work you are doing do you think this stakeholder may be?

Have the person that identified each stakeholder move the sticky note to where they think they should be mapped and have them explain their reasoning behind that placement.

Once the stakeholder is placed, ask the rest of the group if they agree with the placement or they think it should be moved.

Once the CRT reaches an agreement on where the stakeholder should be on the map, move on to the next one.

Follow the same process until all stakeholders have been mapped.

Related Resources

- Outreach Mapping - Community example created in Mural
- From Indicators to Implementation

Follow-Up

Complete a similar process with district stakeholders (educators and support staff, school leadership, district leadership, department of education leadership) if the CRT has not done so already.

Once the CRT has figured capacity for outreach, decide as a group which stakeholders should be prioritized and how they should be reached out to.

Preparing Information Sessions

As the Community Research Team (CRT) gets ready to release the SCOREcard, it is a good idea to start getting some buy-in from local community organizations and start seeing how they envision utilizing this community tool. These can be organizations who might be aware of the SCORE project or organizations for whom this project might be completely new, but they should all have a personal connection from one of the CRT members as identified in the **Outreach Mapping** session. This session will help the CRT figure out what their capacity is for holding these information sessions and what these meetings will entail. The goal of this session is to leave with a rough agenda and have CRT members volunteer to complete the elements identified.

Time Needed

About an Hour

Materials/Resources

1) **Sample Information Session Agenda Template**
2) **Blank Information Session Agenda Template**

Process

Preparation

Create a blank Meeting Agenda Template. An example can be found in the document titled **Blank Information Session Agenda Template.**

Process

Part I: Meeting Prep (30 Minutes)

Following the **Information Session Agenda Template**, have a full group conversation with the CRT and fill in each section moving down until the group gets to the agenda template. Each section is as follows:

Goals/Purpose of the Meeting: Use the two guiding questions to figure out what the actual goals for these information sessions with community organizations are and what needs to happen for them to be successful. The former will help figure out what elements need to be added to the agenda and the latter can provide a guideline for evaluation once the meetings start happening.

Materials Needed Prior to Meeting: This space can be used to note any pre-work that needs to happen outside of the meeting agenda. For example, creating a form email CRT members can use for outreach to these orgs or figuring out how many of these information sessions the group has the capacity for given timelines and availability.

Activity List Brainstorm: The CRT can list elements they think would be necessary to meet the goals. This brainstorm will then provide the sections for the agenda below.

How many CRT members/staff are attending the meeting: Guided by previous conversations about capacity and the roles needed, figure out a rough number of people needed at each meeting. This number may change after the agenda is completed.

How long is the meeting: Come up with a ballpark length for these information meetings. Given the limited capacity community organizations tend to have, we recommend 30-45 minutes as a sweet spot for these. However, you may need to adjust this time once the agenda is completed.

What are the roles needed?: Brainstorm what roles the CRT members/staff facilitating these information sessions would take. These roles may need to be adjusted once the agenda is finalized. Some roles that may come up are facilitator, note taker and technology support.

Part II: Agenda Creation (30 Minutes)

Go through the elements identified during the Activity List Brainstorm and plug them into the agenda template. For each element, identify:

- What the activity is: include some level of detail.
  - How will this activity contribute to the meeting goals?
- How long the activity will take?
- Any materials that need to be created or pulled for this activity.
- Which member of the CRT will take ownership in finalizing the element.

Once all the elements that were brainstormed have been plugged into the agenda template, revisit the meeting goals to ensure everything is covered in the agenda. At this point, also revisit how long the meeting should be, how many CRT members/staff should be present, and what roles are needed to ensure everything in the template is covered.

Related Resources

- Sample Information Session Agenda Template
- Blank Information Session Agenda Template
- Outreach Mapping

Follow-Up

Once this session is completed, every CRT member that volunteered to complete an element of the agenda should add more detail to the Agenda Template as needed.

After the agenda is finalized and all the elements are completed, schedule a session for CRT members to practice facilitating the agenda they created. Separate the group into pairs and have each pair practice with the rest of the CRT and staff as their audience.

APPENDIX

APPENDIX A: RESOURCES FOR VIRTUAL SCORES

The Providence SCORE pilot was conducted entirely virtually, and included a fair bit of trial and error as we all become familiar with the technology. The following list of resources and tips may be of use if any virtual activities will be included in your SCORE project.

Video Conferencing Platforms

We used Zoom to hold our Community Research Team meetings. We used a Zoom Business account so that we would have access to meetings without a time limit, as well as interpretation options. A plan comparison with costs is available on the Zoom website. The Zoom features that we found to be useful for meetings included:

- Chat feature, which increased engagement particularly for Community Research Team members who may have felt uncomfortable unmuting, and provided a space for simple activity instructions, prompt questions, and links.
- Breakout rooms for small group work. Facilitators can assign participants to breakout rooms, or allow them to choose their own. The Zoom Breakout Room Options include auto-timers, the option to broadcast messages to all breakout rooms, and the ability to automatically move participants to or close breakout rooms.
- Simultaneous interpretation options, which enabled us to designate an interpretation channel, assign an interpreter, and have participants choose the channel that met their language needs. At the time of this writing, Zoom interpretation was not compatible with Chromebooks, and there were limitations for mobile apps. The Zoom website has more information about interpretation options.
- Meeting recording options, which allowed an opportunity for review and reflection, and facilitated data collection for a research study on the SCORE project.

Virtual Collaboration Tools

In person, a facilitator's toolkit often includes large chart paper, markers, post-it notes, and the like. We used a combination of the following tools to create spaces where Community Research Team members or staff facilitators could directly contribute written ideas and comments that others could see in real time. Please note that this is not a comprehensive list, but rather options that we have experience using.

- **Google Slides** was our go-to presentation tool, and Community Research Team members are also able to write directly on slides (either in text boxes or via virtual post-its) with the proper sharing settings. Google Slides is free and can be accessed via a personal Google account or a Google Workspace account.
- **Google Jamboard** is a virtual whiteboard tool that is free and available via personal Google accounts, Google Workspace, or the Jamboard app. Intuitive and easy to use, Jamboard allows participants to post virtual sticky notes and images, as well as use pen, eraser, text box, and laser pointer tools. Note that this platform is somewhat limited in terms of design options.
- **Mural** is a virtual whiteboard that offers more options than Jamboard in terms of design and navigation, and thus is useful for more complex activities such as the River of Life. A limited free account is available, though a paid account may be necessary if you would like to use this tool with any frequency.

Online Survey Tools

If you plan to give an online survey as part of a SCORE research project, the following are platforms that we have used. Please note that this is not a comprehensive list, but rather options that we have experience using.

Google Forms is free with a personal Google account or Google Workspace account, and offers the user both automatic data summaries as well as raw response data. Google Forms may have limitations if your survey s complex.

Qualtrics is a survey tool that offers more advanced features and customizable analysis options. A free option is now available with limited features, and paid accounts are also available on a subscription basis. Qualtrics was the survey tool we used in the Providence SCORE pilot, given that our university had a site license.

Alchemer is a survey platform that is more user-friendly than Qualtrics, and has more advanced features than Google Forms. Paid subscriptions are available at various price points.

Tips for Engagement and Accessibility in Virtual Meeting

Preparation and Staffing

- It is often helpful to have a non-facilitator staff member assigned to handle things like monitoring the chat, assigning participants to and managing breakout rooms, and sharing links and/or instructions with participants. Non-facilitator staff can also pay attention to body language for Community Research Team members who have their camera on and gauge needs for support or clarification.
- When small groups were part of a session, we often found it helpful to pre-plan the small group configuration. For early relationship-building activities that include pairs/triads, this can help to ensure that Community Research Team members have a chance to get to know one another in smaller settings.

Language Access

If you have a multilingual Community Research Team, it's imperative that all written materials (slides, resource documents, etc.) are translated. Having live translation of in-meeting written contributions such as participant contributions to virtual whiteboard/collaboration tools, in-session meeting notes, and anything shared in the chat, is also important to ensuring that non-dominant language speakers can be fully engaged.

For small groups in a multilingual Community Research Team, consider having a balance of mixed-language groups with the support of an interpreter and small groups facilitated or conducted in the non-dominant language, so that speakers of other languages can engage directly rather than via an interpreter. If possible, having full group sessions facilitated or conducted in the non-dominant language with interpretation can help dominant language speakers better understand the experiences of non-dominant language speakers.

When sharing videos, be sure to enable subtitles in other languages as needed.

Reflection

Whenever possible, having staff engage in post-meeting reflection or debrief can help to make sense of how meetings with the Community Research Team went, identify successes and/or areas that require adjustment or follow-up, and assess needs for support. Simple tools such as a Plus/Delta or After-Action Review can be used, and staff should make a plan to address any action items that surface.

Additional information on ensuring that your virtual meetings are engaging and accessible can be found in the **Preparation Phase: Questions and Considerations tool**.