The Vision, Strategy, and Learning of IDEA

Reclaiming the “public” in education asks that each of us renews our interest in and responsibility to the future of learning in our democracy

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Executive Summary

There is a powerful story playing out across the United States and Puerto Rico. This document lays out the vision, values, and theory of change that enables IDEA to tell the story of what we call democratic education.

The Problem: A too-simple narrative about education has focused too narrowly on what’s wrong. This has led to policy and practice solutions that are restrictive and disconnected from the primary stakeholders: the young people, families, educators, and communities directly impacted by how we define and imagine learning in the 21st century.

The Opportunity: Given this reality, what distinguishes IDEA is our focus on the positive and powerful responses of educators, young people, and communities to “do school differently” despite the odds and given substantial constraints. **IDEA redefines the problems confronting public education and articulates the opportunity to generate more creative, proactive, and contextual solutions.** These solutions are what give meaning to the term “democratic education” and they are the heart and soul of what IDEA is all about.

What IDEA is doing about it: We’ve attempted to make our thinking visible and tangible because we find that while almost everyone thinks democratic education is a great idea, many struggle with how to make it happen. After two years of research and relationship building, we present our vision in this document for how education stakeholders can collectively make democratic education available to all young people -- and what's at stake if we don’t.

Two years of listening, mapping, organizing, showcasing, and collaborating inform this re-articulation of IDEA's strategy and learning. IDEA is no longer just an idea, it is an emerging national organization that is connected to hundreds of years of history, significant legacies, multiple networks, and communities large and small. Innovation Tours bring people to see democratic education in action. The Eduvation Library showcases hundreds of powerful resources. A real network of members, organizers, and allies has come to life.

What hasn’t changed in the last two years is the threat of losing the “public” in public education. Questions about who gets access to what kinds of learning, and who has ownership and accountability, are central to any real analysis. We must better understand what’s happening across the educational landscape in order to generate more strategic and effective solutions. Still, as our understanding grows, a next set of even more challenging questions arise. What can be done? What must be done? How do we get started? And what values inform what we do?

Our Theory of Change: IDEA is finding answers to these questions. We’ve learned that focusing on shared values offers the most strategic and effective way to connect people, schools, and networks who have common visions but are approaching shared challenges with different strategies. We’ve seen the impact of asking people to name the most powerful learning environments in their community so the conversation becomes less abstract and leads to making connections where at first glance few seemed to exist. And we’ve seen over and over again the importance of place. What democratic education looks like in rural Oregon is different than Brooklyn, New York or Jackson, Mississippi.

Rather than promoting a “one size fits all” approach, IDEA is connecting with local communities, youth and educators to showcase, evaluate and disseminate proven and effective educational practices. Through a unique community organizer model, IDEA is strengthening existing efforts and building the relationships and resources needed to transform the U.S. educational system in ways that honor, rather than wash-away, the complexities of different communities.
But, at the end of the day, what we hope is most noteworthy about IDEA is that we are getting the relationships right. The relationships between teacher and student, student and school, school and community, community and policy, and more. The challenges and opportunities of this moment and the next 10, 20 years and beyond are not too complex when the people directly experiencing challenges are engaged and connected in finding and sharing solutions.

IDEA is providing tools, tours, organizing teams, strategies, position papers, research, and other resources. And certainly, IDEA can be a powerful catalyst for change. But the story that needs to be told is not about IDEA. It is about you, your community and the promise of a world where all young people are engaged in learning that nourishes vibrant democratic communities.

**What this means for you:** It is likely that you have this in your hands because you are an early adopter, a change-maker, or a leader. You are passionate, curious, and committed to thinking about the future of learning in our democracy and how it translates in the place you call home. Whether you are a 14-year-old student, a first-year teacher, an organizer, a policy maker, a parent, or otherwise -- we are counting on you and your community.

Yes, we want you to read this document. Yes, we want you to give us feedback. And yes, we’d love for you to share it across your networks via email, Facebook, Twitter, and over coffee. But what we really want is for you to be part of telling the story of democratic education. You can use our words, or your own—but the call to action is this: **It is time that we all step forward into the public conversation about education and tell a story that demands to be told.**

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What is Democratic Education?

And why it’s the narrative and network we’re building

There are immense challenges confronting education in the United States today. A too-simple narrative runs almost nightly across the airwaves depicting the supposed brokenness of our schools, their lack of accountability, and the failure of teachers. Sometimes this oversimplified narrative also offers up oversimplified, narrow, and seductive solutions that are far removed from the complex reality of today's students, families, teachers and communities.

While these stories run almost without interruption, there is a different, and more powerful, story waiting to be told. A story about schools and communities, young people and teachers, families and organizations reclaiming the “public” in public education. It is a story about the thousands of places where students are offered meaningful opportunities to engage in learning that is relevant, powerful, and human. Learning where young people are equipped with the tools to problem solve, innovate, collaborate and engage in work, life and society. That unfolding story is the story of democratic education.

Democratic education is not a type of school or research-based practice. It isn’t one kind of learning program or philosophy. It is a frame. It’s a way of gathering together a vast and powerful set of ideas, philosophies of learning, research, school models, teaching practices, policies, and community visions so that a powerful story can be told that reclaims the “public” in public education—that is, education owned by all of us. And it is a story that demands to be told.

Democratic education is a story of values. It is the story of people and communities, of quality education, of access to opportunity, of empathy, responsibility, and humility. Values are the foundation that rests beneath every school plan, budget, strategy, project, or message. When evoked, values help us locate our best opportunities to collaborate and take practical action.

Democratic education is a story of vision. It is not a reactive frame, but rather a generative one. It is a story about the present and future of learning. It is the story of what happens when everyone is engaged in the adventure of learning.

Democratic education is a story of relationship. It’s about people learning better ways to work together with openness, critique, and empathy. It’s about realizing equity of access, quality, and spirit.

Democratic education is not partisan. It is not a “big D blue” or “big R red” concept. It is simply about promoting educational experiences for all students that will create a thriving democracy. Democratic education is something we find almost everyone thinks is a great idea, but doesn’t quite know how to make happen.

Which is where IDEA shows up. Our work as an organization is to identify the many powerful but often localized or disconnected examples of democratic education around the country. We support students, teachers, parents, school leaders, unions, networks, policy makers, and the media to connect the dots and make the critical connections among their efforts. Education by, for, and with young people, educators, families, and communities—what we call “democratic education”—is the frame we use to identify, connect, and mobilize action around the best ideas and practices that advance learning and sustain the core democratic values of our society.

IDEA helps show what powerful learning looks like in 2012, and what it can look like in 2020, and creates the pathways so eventually all young people get access to that learning every day, everywhere.

Will you join us?
Values

We think values are more fundamental than an organization’s mission, vision, strategy, or theory of change. One of our values is transparency, so we offer up our values front and center:

1. Humility
The basis of humility is a belief that no one is worth more than anyone else. Through our work, we engage with others in honest, open, and caring conversations, while maintaining the humbleness required to know that we don’t have all the answers.

2. Positivity
There are plenty of reasons to feel despair. And yet we believe we must move beyond merely reacting negatively to current educational initiatives. When people are creative and generative, we find new solutions to old problems. We focus on what could be in hopes of seeing the challenges of today, and their historical context, with fresh eyes.

3. People and Story at the Center of our Work
People on the front lines of a challenge will almost always have the most recent and most accurate information about how to solve that challenge. People have always communicated important ideas through stories. Story is a powerful way to get to the heart and make sense of things.

4. Practical Action and Transparency
A thousand disconnected efforts will not change the story being told about education. We need to take effective and coordinated action, plan and act strategically, and be generative. We think it also helps to have a sense of humor, be transparent, be respectfully direct, and to plan for the funding needed to make projects real. We can begin to build something together by choosing manageable, concrete projects to build on.

5. Collaboration
We are much more interested in collaborating with other education-focused organizations than competing with them. Collaborative groups are the most natural unit of work. Raising many voices around the same issue is an opportunity to learn from each other, amplify messages, and build a strong movement.

6. Learning From Failure
Innovation requires experimentation and failure. We are going to get it wrong sometimes. Sometimes we will get it right. Wrong or right, some people will not like what we do. We are committed to learning in public. We call that “failing successfully.”

7. Embracing Difference & Conflict
Conflict is our best ally. Concerns are the fuel of better solutions. It takes courage to speak a problem, and maybe more to really hear one. We won’t get anywhere if we can’t find that kind of courage. We must find ways to bring together people who think differently and might seem like enemies. Those differences often bring great strength when explored.

8. Place Matters
We value youth understanding the history, culture, ecosystem, and stories as they connect to their local communities. Connecting to our location and being rooted to a sense of place and history is important. We know that when three generations or more are present, culture is transformed.

9. Some Types of Learning Are More Essential than Others
Learning how you best learn and having your curiosity and creativity nurtured is core to powerful education. In today’s world, so is learning to read, write, work with numbers, and use the Internet. Without these skills, it’s just about impossible to achieve your goals and fully contribute to your community.

10. Accountability
What we measure is as important as how we determine what works and what doesn’t. Everyone should be excited about accountability - we just need to have a different conversation about what and to whom we will be accountable. We must highlight our best and most diverse voices for and examples of transformative educational change.

“I’m thinking of blowing up your values page and posting them in our office. They are clear, inspirational, practical and important.” —Kathryn Casey Quigley, North Fork Education Initiative
Trying to Make Sense of What’s Happening: IDEA’s story about the current educational landscape

Education transforms society and society transforms education. And with the rapid changes to the publishing, recording, newspaper, technology, and even banking industries, it should come as no surprise that people’s conception of schools and learning is changing rapidly.

Over the last two years, IDEA’s staff and organizers collectively traveled more than 400,000 miles, spoke with more than 2,000 people, and participated in more than 22 national or regional conferences trying to make sense of what’s going on across the country. One of the things we’ve found most interesting to ask is, “What’s the story you tell about education?” It is fascinating to hear so many different points of view, find common points of understanding, and consider what it all means.

Here is the way we are making sense of today’s larger educational landscape starting off with a metaphor of a large house as a way to give a quick picture of what we think is going on:

Imagine our “educational house” as a building with some very nice rooms, and others with leaking pipes and exposed asbestos. Regardless of which room they live in, few folks are happy with the house overall, and most everyone agrees that it needs some major remodeling.

What has happened is that one group remodeled the kitchen only to learn afterwards that another group needs to tear it back up to do some electrical rewiring. Meanwhile, a third group is currently working on an interior redesign but is completely unaware that a fourth group is outside with a bulldozer wanting to start from scratch. We could go on, but we hope you get the picture.

Using the house metaphor, a few key issues jump out:

1) There is not agreement on who owns the house.

2) There is not agreement on how decisions will be made regarding the future remodeling of the house.

3) Some of the tenants who live in the house are part of the remodeling conversations, while others are not.

4) Remodeling has been going on for the last 30 years, and the house needs more work now than when remodeling began.

Now, let’s add to our house metaphor all of the external problems happening outside of the house. There’s rapid economic change towards a knowledge-based economy. There’s the long shadow of systemic racial injustice. There are the real impacts of global climate change. And, let’s not forget gross poverty, violence, and family breakdown.

With so much going on inside and outside the house, the tenants are busy and consumed by reacting to one immediate event after the other. They don’t have the time or energy to think beyond that day’s events. They often wonder if anyone else in the house is having a hard time or
is feeling disconnected and frustrated by what’s happening, but then something else requires their 
attention and they move on with their day.

Finally, a pile of newspapers shows up on the front doorstep of the house. One headline says that 
the house must be converted to create an army of engineers to race India and China. Another 
says half the tenants (read: teachers) may need to move out. Another announces the arrival of a 
privately owned house opening next door that anyone can choose to move into. And on and on 
the metaphor can go.

The challenges that face our school leaders, teachers, and most importantly, young people, are 
daunting.

**How did we get here?**

As a gross generalization, public schools and districts have had a difficult 
time adapting and responding to the 
changing needs of young people, 
families, and communities. Existing 
policies don’t support change and rarely 
reflect the concerns and wisdom of 
teachers, young people, and community 
leaders. As the speed of social, 
technological, and environmental change 
increases, the response has been to 
increase focus on high-stakes testing and 
simple notions of “accountability” while 
trying to train young people for jobs that 
are becoming obsolete.

Add to the mix, as we did in the house 
metaphor, historic and structural 
inequality, the significant differences 
between urban and rural environments, 
and the growing disagreement about the 
fundamental purpose of education, and 
the “pressure in the system” begins to 
feel palpable.

**How does IDEA fit in all this?**

There is nothing novel about this 
analysis. What is distinct about IDEA 
is our attention, given this reality, on 
the positive and powerful responses 
of educators, young people, and 
communities to “do school differently” 
despite the odds and given the 
substantial constraints. We don’t claim to 
have all the answers, but we collaborate 

And for those of you who like facts more than metaphors, 
here is a quick look at the most eye-popping:

**The national graduation rate is at 73.4%. However, White students 
graduate at a rate of 78.8% and Asian students at 80.5%, while it 
is 63% for Latino students, 58.7% for Black students, and 53.1% 
for American Indian students.**

toc/2012/06/07/index.html Statistics are for the class of 2009, the most recent year that 
full data is available.

**In Texas, while 25% of white students do not graduate, 45-50% 
of Latino and Black students don’t graduate and are often pushed 
out to increase school ratings.**

High-stakes accountability and the dropout crisis. Education Policy Analysis Archives, 16(3). 

**Two-thirds (66%) of students report feeling bored every day in 
class during high school. The top reasons are uninteresting material 
(81%), irrelevant material (42%), and no interaction with the teacher 
(35%).**

Center for Evaluation and Education Policy (2010). Charting the Path from Engagement to 
Achievement: A Report on the 2009 High School Survey of Student Engagement. Indiana 
University.

**In 1988 the most common experience level of teachers was 15 
years. In 2008, the most common experience level was 1 year. This 
is tied to an “unprecedented wave of retirements,” efforts to expand 
alternative teacher pathways, and vastly increased beginning-teacher 
attrition as young teachers are often assigned to the most challenging 
schools and “burn out in a few years.”**

National Commission on Teaching and America’s Future.

**Teacher turnover is lowest in schools with positive working 
conditions, including a trusting and respectful school culture, 
supportive and organized leadership, and collegial relationships 
where teachers learn from and with one another. Schools serving 
low-income and high-minority populations are least likely to have 
these conditions.**

Project on the Next Generation of Teachers Harvard Graduate School of Education.
with others who are struggling with the same questions.

IDEA’s attention is focused on finding the “bright spots” in the educational landscape, and there are thousands of them: relevant, meaningful, and just education inside public schools, in after school programs, in community-owned charter schools, and a host of other designs and structures exist in every state. Our best educators and leaders are finding ways to make this happen, even in seriously under-resourced settings. But their story hasn’t been told widely enough, and one result is that far too many students and communities don’t have access to the kind of learning environments they want.

Many have given up, some exhausted by the substantial weight of constraints, others just can’t find the leadership, support, or avenues to make their dream schools and community centers a reality. And lots of folks just can’t see what is possible because they haven’t experienced it or have never heard this larger story.

As the United States and countries like Puerto Rico (also under the jurisdiction of the U.S. Department of Education) search for ways to rebuild local economies, to grow entrepreneurship, to deepen civility and democracy, and to find leaders that can work across difference -- an answer rests in schools, neighborhoods, and communities.

The brightest hope for restoring the promise of democracy rests with our schools and the communities that support them.

Reinvesting in the concept of “public education” while simultaneously reinventing what that education looks like, how it is accessed and assessed, and who owns it, is no small chore. But schools and learning can and are being reclaimed by communities, by teachers, and by young people. And IDEA is focused on calling for and supporting people to take responsibility for their governance, leadership, curriculum, and vision. In today’s world, we cannot have a set of “one-size-fits-all” education policies. Top-down reform efforts, largely in the hands of “experts,” have missed the mark of creating widespread change in how we learn and educate for a thriving democracy.

“Employers report that 58% of high school graduates lack self-direction, 70% lack problem-solving skills, and 73% lack leadership abilities.


“The wealthiest school districts in the United States spend nearly 10 times more than the poorest, and spending ratios of 3 to 1 are common within states.”


“Foundations provide nearly $4 billion to education every year. The top 3 are the Gates, Walton, and Broad Foundations, whose investments—for good or bad—define the national educational debate.”


“What I’m especially excited by is IDEA’s ability not only to develop cross-sector relationships with a variety of stakeholders, but also that the organization has a depth of understanding that runs along the other critical axis in this project – that is the axis that runs from policy to practice. Holding the capacity to function productively along both these axes is a rare gift, and one that will be critical to the ultimate success of those who are intended to benefit. Because IDEA has spent its history seeking out and developing relationships with schools that exemplify powerful and productive classroom practice, IDEA is in the position to convene groups with wide interests that are able to dive deep into the issues that matter most and will ultimately bring about the change we want.”

Susan MacKay, Center for Children’s Learning, Portland, OR
Mission, Vision, and Theory of Change

Mission
Mobilizing action to advance meaningful learning and build a more just and sustainable democracy.

Vision
IDEA envisions a world where all young people are engaged in learning that nourishes vibrant democratic communities.

Theory of Change
Existing efforts to reclaim and reinvent education are strengthened by a growing network of schools, educators, and organizations that are united under the powerful framework of democratic education. This inclusive narrative attracts people and organizations committed to social justice and human rights, place-based and community-based education, social and emotional learning, youth engagement, and systems change. The concepts that unite these various efforts are made tangible and credible through the actual practices of teachers, schools, and organizations.

It starts with making sense of things

“I was particularly struck by your commitment to ‘honoring, rather than washing away, complexity.’ It is a principle that we should elevate in all our work on education improvement, including our methods of evaluation. Too few actors in the education reform space seem to get this (much less politicians!).”

Ben Cannon, Senior Advisor to Oregon Governor John Kitzhaber

Understanding history and context is vital to any effort that wishes to be strategic and collaborative. Organizing and mapping are about connecting dots, building relationships, making sense of things, and finding new ways forward. IDEA builds organizing teams that connect and strengthen existing efforts and works with them to map and build collaborative strategies rooted in the history and context of people and communities.

We showcase and learn from what’s already working

“The seven-year old-whose life you want to impact doesn’t care about how you arrived at your curating criteria—she wants her life changed by them.”

- Seth Godin

Using transparent “curating criteria,” we seek to identify and lift up the highest quality examples of democratic education in practice, in policy, and through the voices and stories of young people, educators, and communities. The Eduvation Library is our effort to create a searchable database of resources (curated well enough that one of our organizers called it “better than Google”), while our Innovation Tours offer in-person experiences to see democratic education in action.

We take action
In Puerto Rico, we are contributing to the Education City Initiative -- a project working with teachers, students, community leaders, and across political parties to re-imagine the entire city as a school.
Recently, we laid the ground for an organizing team in Minnesota and consulted The Boggs Educational Center in Detroit on governance and planning issues. Taking action means “getting messy” and acting on ideas with courage, discipline, and perseverance.

**We amplify the messages and people that best tell the story**

In a world full of static and distraction, it can be hard to get people’s attention. We are committed to creating movement through digital, social, and print media. We are building the infrastructure needed to get the best work, ideas, and ambassadors into the world.

**We identify and spread breakthrough strategies and tools that have an impact**

Adapting tools like [Outcome Mapping](#) and the [Breakthrough Series](#) from other sectors, we are identifying ways to solve shared challenges of practice and policy by honoring complexity and difference, rather than washing them away. Anyone can be part of implementing strategies to reclaim education and figuring out what has the most impact.

**And we know who the real heroes of this story are**

The story is not about IDEA. It is about the people we count on to make change -- the young people, educators, families, and communities who are making the critical connections and already responding with positive solutions to today’s reality. We approach our work thinking about how to support existing efforts to grow stronger and more connected. We don’t care about taking credit. We care about making sure a new story about education gets told.

![Image of birds with text: There's a story to be told.](image)

Birds that migrate have an awareness of the weather patterns, the connections between places, and can spot important movements on the ground. During a brainstorming session at a [Community Learning Exchange](#) gathering in Seattle, IDEA was described as being like birds flying from place to place around the country. Sometimes singing from trees, sometimes on a shoulder, and sometimes carrying a message—IDEA signals connections, sings out the bright spots, and builds awareness of what's happening from one community to another.
How We Approach Organizing

“Organizing” has come to be a word that seems to provoke a strong reaction from folks. For some, it is a positive term, and for others it seems either controlling or a way to manufacture support. For us, organizing is a linchpin strategy because it’s about building relationships. Different communities, networks, and organizations might use very different strategies or language but share common values. When those values are highlighted and connections across strategies made, more strategic and collaborative organizing ensues. This chart shows how we’ve come to think about our organizing efforts:

We “organize” at multiple levels (the two big arrows) and in unconventional settings to build a network that connects people from all walks of life and all points of contact at the grassroots level and within existing policy, funding, and institutional networks. (See appendix for more details about our organizing structure).

We want to be in relationship with everyone. We listen.

We collaborate with people and organizations with whom we share values.

We make connections across strategies that may seem opposed at first glance, but offer transformational opportunities when viewed through shared values.

Resist
Working inside systems to keep things from getting worse

Alternatives
Creating new programs, schools, or forms outside systems in hopes of inspiring or influencing them

Reform
Working inside systems to improve things incrementally

Consciousness
Using books, videos, media, messages, and ideas to influence people’s awareness or worldview

“Everyone’s waiting for someone else to make a change -- states are waiting for towns or districts to change policy; game of “we won’t move until you do.” All those levers move one another. Zoom out and see how you can communicate with and connect them. That’s an important part of the organizing work.”

Adam Burk, TEDx Dirgo and IDEA Organizer

Note: The inside circle of this image is attributed to Joanna Macy, and was introduced to IDEA at an Education Circle of Change gathering in Sante Fe, New Mexico, led by Spirit in Action.
Monitoring our contribution to impact

IDEA is actively adapting **Outcome Mapping (OM)** methodology from the fields of community and economic capacity building into an educational context.

OM unites process and outcome evaluation and is well suited to long-term, complex functions trying to capture how an organization is one of many influences that creates impact. This is critical as we recognize the limitations of organizations that take credit for changes that have come about through a variety of partnerships, history, and contexts.

OM accomplishes this by focusing on:

1. Documenting how the people we count on to make change (what OM calls “boundary partners”) identify their progress and share their learning
2. Assessing the effectiveness of strategies
3. Regularly monitoring organizational learning and practices

Online journaling tools will collect this information on our website beginning September 2012. Regular monitoring meetings are held to pull in learning and impact across the network and areas of organizational effort.

IDEA’s website includes a description of the pathways we will monitor for each of the groups IDEA counts on to make change:

1. Young People
2. Parents and Families
3. Teachers and People Who Work with Youth
4. Schools and School Leaders
5. Organizers, Networks, and Organizations
6. Other Actors that Influence Schools
7. Media
The hard numbers

Outcome Mapping rests on a theory that no one actor can create change in a complex system like education. It focuses on contributions to impact once you are in relationship with others. Projecting a statement of impact in hard numbers for what IDEA’s work adds up to is both challenging and important. If our work is happening right, we aren’t taking too much credit for change and great things are beginning to happen that we had little to do with. And, we also want to be clear and accountable to the impact we want to help cause.

So, here’s our statement of impact:

By the Fall of 2015, IDEA’s efforts will have contributed to:

- 200 schools, networks, organizations, and less formal groups connecting and collaborating together with a common frame.
- 200,000 people directly connecting via social media across this network.
- 10 million people who can be reached if one message is forwarded within this network.
- Outcome Mapping indicators reflecting a five-fold increase in the depth and reach of young people, parents, educators, and communities advocacy to reclaim and reinvent education.
- 3 national policy proposals having been generated through convenings, research, and practice that honors the complexity of different communities and designs for adaptation rather than a one-size fits all approach.
- Substantial and collaborative organizing efforts that embody the values of democratic education existing in at least 30 states.
Strategic Growth Plan

Since launching two years ago, IDEA has laid the organizational infrastructure and made significant inroads towards reaching our initial goals. During the next 18 months, we see the opportunity to build off that solid foundation and significantly increase our contribution in framing the national discourse on education. The story of democratic education is on a trajectory to change national and state policies within the next seven years.

The next steps over 18 months

IDEA needs to continue:

• Focusing on building relationships and amplifying successful outliers. By being an organization that sets a standard and finds local heroes, we foster courage. Every time we highlight a teacher or an organizer who is a community leader in education, we encourage others to step forward, as well.

• Translating research studies, policy, and national turning points into language that is accessible to the general public.

• Growing the membership network of schools and organizations. This network, like Innovation Tours, defines the edges of democratic education through real places and real practices. In addition, the relationships we have with these organizations keep IDEA out of “policy Never Never Land” because we are connected to educators and community leaders as they confront everyday challenges.

• Building the depth and diversity of staff and board leadership.

• Generating increased media attention. We have had growing media exposure over the last 12 months, including a feature by YES! Magazine, coverage of our NYC Fall 2011 tour by Gotham Schools, an interview of Scott Nine by Steve Hargadon, and several stories covering our organizers.

IDEA can improve by:

• Organizing in teams that are designed to learn, strategize, and have an impact within the Outcome Mapping framework and across the geographical regions or communities where we’ve made a commitment (see appendix for details). This organizing redesign must be articulated by July 2012 with implementation beginning September 2012.

• Locating ourselves within the national educational discourse by publishing position papers on hot topics and key issues. Initial publications should be available by September 2012.

• Making our learning and mapping of the educational landscape visible. By creating a web-based interface that invites new inputs, analysis, and comments, we will offer a powerful way for people to get a better “read” on what’s going on and how, where they can learn and collaborate with other like-minded efforts. A first effort should be available on the web by December 2012.

• Using Batchbook online software as the pivotal tool for supporting organizational and network collaboration. Every team leader, organizer, and member should be able to effectively make use of this powerful tool by December 2012.

• Moving towards a blogging presence that is more like The Dish by Andrew Sullivan, a single blog filled with personality, curated comments, and featuring a daily and weekly wrap that keeps people...
tuned in to the most important information in an accessible way. Goal is to launch the new blog personality and structure in September 2012.

- Generating increased financial sustainability by meeting the new matching challenge recently granted to IDEA by The Bay and Paul Foundations. Bay and Paul will match the first $10,000 of any foundation grants, as well as matching dollar-for-dollar any individual donations that support our community organizing efforts up to $100,000. This challenge begins July 1 and ends January 31, 2013. In addition to increasing foundation and individual support, we hope to generate $40,000 in 2012 and $80,000 in 2013 from companies that support our mission and values.

- Growing our direct network of contacts and relationships to 125,000 by December 2013.

### IDEA will evolve with the implementation of four initiatives

1. The full implementation of the Outcome Mapping methodology will shape the focus of our organizing, our ability to identify our contributions to meaningful change, and the way we learn as an organization. Of particular note is the opportunity to redesign our website so that everyone can be part of the action. By organizing our site around the specific audiences we count on to make change, we can provide any interested person an immediate pathway into the conversation, designing strategies, implementing strategies, and evaluating them. These changes will also make it possible for past IDEA organizers to continue being part of the action even if their roles or time availability changes -- something essential for us to build real organizing capacity over time.

2. Piloting our first Learning Breakthrough Series provides an opportunity to truly make use of our diverse and powerful network. As we adapt the “Breakthrough Series” model of the Institute for Healthcare Improvement to education, we imagine young people, teachers, parents, community members, school leaders, policy makers, and researchers coming together to generate knowledge that can shape practice and policy in a way that is unique in education (see appendix for more about the Learning Breakthrough Series).

3. IDEA has accepted the invitation to serve as the national leader of the International Democratic Education Conference (IDEC) being held at the University of Colorado in Boulder in August 2013. The conference, which rotates continents each year, holds potential to broaden and strengthen democratic education and will give IDEA a physical location to point our organizing teams, networks, and convening efforts.

4. La educación democrática no es una conversación en un idioma. (Democratic education is not a conversation in one language.) IDEA’s last two Innovation Tours have been multilingual and more than half of IDEA’s board are native speakers of Spanish. We plan to have a full website en español operational by January 2014.
Generating Revenues to Match Opportunities for Impact

IDEA has increased revenues by 309% in its first three years of operation. More importantly, we have made strong progress in diversifying the organization’s revenue streams. In 2012, 15% of revenue is earned and another 13.7% is coming from individual donations.

### First Three Years

<table>
<thead>
<tr>
<th></th>
<th>2009-2010</th>
<th>2010-2011</th>
<th>2011-2012</th>
</tr>
</thead>
<tbody>
<tr>
<td>Earned Revenue</td>
<td>$1,215.00</td>
<td>$30,795.62</td>
<td>$58,134.11</td>
</tr>
<tr>
<td>Individual Donations</td>
<td>$10,483.08</td>
<td>$10,102.07</td>
<td>$52,240.11</td>
</tr>
<tr>
<td>Foundation Grants</td>
<td>$81,000.00</td>
<td>$267,100.00</td>
<td>$265,919.82</td>
</tr>
<tr>
<td>Corporate Support</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Total Income</td>
<td>$92,698.08</td>
<td>$309,392.37</td>
<td>$379,729.88</td>
</tr>
</tbody>
</table>

Over the next three years, opportunities exist for IDEA to generate the revenue needed to live out the promise of our mission and vision.

### Next Three Years

<table>
<thead>
<tr>
<th></th>
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<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Earned Revenue</td>
<td>$153,000.00</td>
<td>$280,000.00</td>
<td>$360,000.00</td>
</tr>
<tr>
<td>Individual Donations</td>
<td>$65,000.00</td>
<td>$95,000.00</td>
<td>$125,000.00</td>
</tr>
<tr>
<td>Foundation Grants</td>
<td>$340,000.00</td>
<td>$500,000.00</td>
<td>$500,000.00</td>
</tr>
<tr>
<td>Corporate Support</td>
<td>$40,000.00</td>
<td>$80,000.00</td>
<td>$120,000.00</td>
</tr>
<tr>
<td>Total Income</td>
<td>$598,000.00</td>
<td>$955,000.00</td>
<td>$1,105,000.00</td>
</tr>
</tbody>
</table>

**Earned revenue** projections are based on increasing interest in Outcome Mapping, Strategic Consulting, IDEA’s Membership Network, and Innovation Tour Development along with improving methods for organizational and network sponsorship of IDEA Organizers. In 2012-2013, IDEA will also begin to offer a focused series of online webinars. In 2013-2014, IDEA will launch several “Learning Breakthrough Series” and look to partner with others in offering a more concentrated Professional Development Series for teachers.

**Individual donations** significantly increased in the last year as IDEA made use of the online fundraising tool “Fundly” to generate donations and pledges as part of a matching challenge campaign. Our success has caused us to reconsider our early decision to not focus on raising money from individual donors. It is becoming clear that many of our organizational strengths (savvy with social media and technology, highly relational, having a sense of humor, and establishing strong connections with organizers) make it feasible to raise money online in ways we doubted initially. And, at the same time we are raising money online, IDEA’s Board of Directors has begun actively courting higher net-worth supporters for both short and long-term gifts.
Foundation support continues to be IDEA’s primary source of income (72%), with The Bay and Paul Foundations and New Visions Foundation (our first supporters) still supplying the bulk of that support. We have engaged in strong efforts to cultivate other foundation support during the last two years, with a handful of promising national supporters emerging and several smaller grants from local foundations likely. The matching challenge The Bay and Paul Foundations awarded IDEA from July 1, 2012 to January 31, 2013 provides further incentive and opportunity to secure funding from several foundations over the next 18 months, significantly increasing the breadth and depth of IDEA’s support.

Corporate support is expected to begin and grow over the next three years. Two of our newer board members, Robert Davis and Stephanie Rogen, have been instrumental in helping us develop a strategy to secure corporate supporters that share our values and appreciate our approach to educational change.
## Tools, Programs, and Products

We aim to provide resources that are genuinely useful and significant. We charge for some of them so we can keep researching, creating, and sharing.

<table>
<thead>
<tr>
<th>What</th>
<th>Description</th>
<th>Cost</th>
<th>Who does the work?</th>
</tr>
</thead>
<tbody>
<tr>
<td>For anyone and everyone</td>
<td><strong>The Eduvation Library</strong>&lt;br&gt;A clearinghouse of best practices, tools, videos, research, lesson plans, and more.</td>
<td>Free</td>
<td>Dana Bennis and Shawn Strader lead this effort with IDEA interns</td>
</tr>
<tr>
<td></td>
<td><strong>IDEA Snapshot School Evaluation</strong>&lt;br&gt;A concise research-based tool developed with students to give you a quick sense of a school's culture and climate.</td>
<td>Free</td>
<td>You do. The tool was developed by Dana Bennis in collaboration with several organizations, writers, and young people</td>
</tr>
<tr>
<td></td>
<td><strong>Innovation Tour</strong>&lt;br&gt;Participating in an Innovation Tour, in which up to 30 participants visit four exciting learning spaces, will give you a chance to see democratic education with your own eyes.</td>
<td>Ranges from $100 to $600 (not including travel)</td>
<td>Most tours are created by IDEA Organizing Teams within their geographic area of focus with assistance from IDEA Staff</td>
</tr>
<tr>
<td></td>
<td><strong>Webinars and Workshops</strong>&lt;br&gt;Online and in person, we offer a variety of workshops on key issues, communication, and improving practice.</td>
<td>Varies</td>
<td>Presenters vary, coordination is led by Dana Bennis</td>
</tr>
<tr>
<td>For Individuals - Students, educators, parents, community members, policy leaders</td>
<td><strong>Action Kit</strong>&lt;br&gt;If you want to just get started doing something, this is the place to begin.</td>
<td>Free</td>
<td>Created by Dana Bennis and Scott Nine in close collaboration with Adam Fletcher and CommonAction, The Young People's Project, Quality Education as a Constitutional Right, Yes!, Shikshantar, National Youth Rights Association, National Student Bill of Rights</td>
</tr>
<tr>
<td></td>
<td><strong>Email and phone consultation</strong>&lt;br&gt;If we can help you &quot;move the needle&quot; or solve a problem, we want to.</td>
<td>$100/hour</td>
<td>Scott Nine, Dana Bennis, or other contact as requested</td>
</tr>
<tr>
<td>For Groups, Organizations, and Networks</td>
<td><strong>Place-based organizing teams building Innovation Tours</strong>&lt;br&gt;See an opportunity to build conversation about democratic education in your town, city, or across your state by organizing an Innovation Tour? We’re ready if you are.</td>
<td>$8,960/year</td>
<td>First contact is with Scott Nine or Dana Bennis</td>
</tr>
<tr>
<td></td>
<td><strong>Outcome Mapping in Education</strong>&lt;br&gt;We’ll assist you in adapting this powerful tool to the U.S. educational context, identifying your organization’s contributions, impact, and learning in ways that will assist you to be more strategic, collaborative, and effective.</td>
<td>$7,500</td>
<td>First contact is with Scott Nine or Dana Bennis</td>
</tr>
<tr>
<td></td>
<td><strong>Membership</strong>&lt;br&gt;Apply to join a powerful group of schools and organizations working together to solve shared challenges.</td>
<td>$100 to $10K/yr depending on size</td>
<td>Shawn Strader is who you’ll hear from first</td>
</tr>
<tr>
<td></td>
<td><strong>Workshop and Speaker Fees</strong>&lt;br&gt;Our staff and network have lots of wisdom to share at a great value. Consider us for your next professional development day or conference keynote.</td>
<td>$1,250/day plus travel</td>
<td>IDEA Staff, Organizers, Board, or Advisers can be approached</td>
</tr>
<tr>
<td></td>
<td><strong>Learning Breakthrough Series</strong>&lt;br&gt;Be part of a long-term action research process to generate specific practice or policy solutions that master for complexity and benefit your community or institution.</td>
<td>$10K average, varies based on size</td>
<td>Dana Bennis leads this effort</td>
</tr>
<tr>
<td></td>
<td><strong>Strategic or Technical Assistance</strong>&lt;br&gt;From supporting the Education City Initiative in Puerto Rico to helping craft school strategic plans, we are happy to contract in ways that make use of our knowledge and skills.</td>
<td>Varies</td>
<td>Scott Nine</td>
</tr>
<tr>
<td>For Media</td>
<td><strong>Education 101 Webinar</strong>&lt;br&gt;Two-hour orientation to the educational landscape, frames that journalists need to be aware of, tool-sharing for improving depth and breadth of coverage.</td>
<td>$40 per person or $400 per webinar</td>
<td>Scott Nine will work with the Media focused organizing team to develop this webinar</td>
</tr>
</tbody>
</table>
Analysis of strongest earned revenue products

IDEA is committed to earning revenue as an organization in order to be financially sustainable and in the best position to realize our mission and vision. These projections provide insight into where there is the most interest and value in what we are offering:

**Innovation Tour Experience**

Four tours have each had 25-30 participants paying between $150 and $500 dollars to participate in two and half day event. Average revenue generated is $4,500 per tour. Attractive for youth leaders, policy makers, teacher, organizers, and school leaders for similar reasons. The tour offers direct tangible experience in environments that do school differently. And, the tour offers a process of making meaning of the experience in dialogue with folks across the education stakeholder spectrum. Both are unique opportunities.

<table>
<thead>
<tr>
<th>Year</th>
<th>Revenue</th>
</tr>
</thead>
<tbody>
<tr>
<td>2012-2013</td>
<td>$18,000</td>
</tr>
<tr>
<td>2013-2014</td>
<td>$27,000</td>
</tr>
<tr>
<td>2014-2015</td>
<td>$36,000</td>
</tr>
</tbody>
</table>

“I got clarity. I was able to go far beyond a book or a definition of democratic education. The tour helped me know it, see it, feel it and now I am committed to it. This was much better than a definition or a video. I think this is the best way to pass these ideas on and now I’m committed to democratic education because I see that it works for kids. One thing that surprised me is the ever-present conversation about race in the US. It was important but is different than what I understand from a Puerto Rican context. I liked the choices and seeing four schools at different levels. Everyone was so honest. This was very concrete learning.”

Lourdes Aponte, Puerto Rican Educator and Innovation Tour Participant

**Place-Based Organizing Teams**

In just the last few months, IDEA has introduced a way for other networks and groups to share fund the costs associated with building a place-based organizing team. The first opportunity in MN has led to another opportunity in IA. The attraction is the design of IDEA’s organizing model and its approach to building collaboration across existing networks and organizations while building public conversation through the development of Innovation Tours.

<table>
<thead>
<tr>
<th>Year</th>
<th>Revenue</th>
</tr>
</thead>
<tbody>
<tr>
<td>2012-2013</td>
<td>$8,960</td>
</tr>
<tr>
<td>2013-2014</td>
<td>$35,880</td>
</tr>
<tr>
<td>2014-2015</td>
<td>$71,760</td>
</tr>
</tbody>
</table>

**Outcome Mapping in Education**

Applying Outcome Mapping within the U.S. educational context is an area of expertise that can distinguish IDEA while supporting our mission and vision. Since IDEA began sharing its internal use of Outcome Mapping in May, we’ve been approached by schools, networks, and two foundations about its applications. IDEA is currently working on its first facilitated offering of OM in Puerto Rico for Fall 2012.

<table>
<thead>
<tr>
<th>Year</th>
<th>Revenue</th>
</tr>
</thead>
<tbody>
<tr>
<td>2012-2013</td>
<td>$7,500</td>
</tr>
<tr>
<td>2013-2014</td>
<td>$30,000</td>
</tr>
<tr>
<td>2014-2015</td>
<td>$60,000</td>
</tr>
</tbody>
</table>
Membership

IDEA is actively generating revenue through a low-cost sliding-scale membership program for groups, schools, and organizations. Membership provides an hour of consultation, a discount on products and services, and support for collaboration across the network. This network has been of interest to folks because of the quality and diversity of other members, the focus on collaborating across the network to solve shared challenges, and the mutual benefits to the organizations and IDEA when they affiliate.

\[
\begin{align*}
2012-2013: & \text{ $16,500} & 2013-2014: & \text{ $25,750} & 2014-2015: & \text{ $38,250}
\end{align*}
\]

In Development

Over the next year, we plan to pilot and consider a variety of webinars and workshops that might be helpful in the professional development of teachers as well as for youth and adult organizers. In addition, we plan to launch our first Learning Breakthrough Series (LBS). Developing this deep-dive research process within the education context is one of our highest priorities. Each of these offerings will be evaluated by the impact they might have and their ability to generate revenue at a level consistent with their growth.
Top 5 Insights: What we’ve learned in our first two years

1. **The story that needs to be told is more significant and more complex than the “education is broken” narrative that most school change or reform efforts are built on.** It’s not that there aren’t big challenges -- but “school is broken” doesn’t leave room to see what is working, what’s right, and the “bright spots” within the existing education system. In addition, any real efforts to transform learning for young people will require leadership and the best wisdom of teachers and school leaders. So we need to call out all the challenges, but the focus of the story should be on resilience, creativity, and solutions that point towards the educational environments we want.

2. **Focus, focus, focus.** We almost don’t need to say more. There are literally thousands of opportunities to connect, collaborate, and organize across the country. That is terrific and vital. However, as an organization, we have to resist rushing or over-promising so that our efforts remain potent and we continue to build trust and focus on really moving the needle.

3. **Mapping as a pre-condition to building capacity.** When we started IDEA, we set out to map (informally) what was going on around the country. We did this for ourselves. Our thinking was that if we wanted to be strategic and collaborative, we had to have a better sense of the landscape. So we met with teachers and administrators, community leaders, government officials, and funders and asked them for introductions to other key players in education. We don’t pretend to have it all figured out, but we do have a much stronger sense of the “field” than we did when we began this work. We soon learned that the byproduct of our effort was a tremendous amount of helpful, uncommon knowledge.

4. **Transparently locating ourselves in the education landscape.** The field of **Capacity Development** says that understanding the landscape you are in, and locating yourself within it, is the precondition for building capacity. You could say that much of the last two years has been dedicated to this. When we launched IDEA, we made an intentional choice to share our values but not to come out with a series of positions on every hot issue. First, we wanted to listen and learn from the organizers and people we networked with (and we still do!). Second, one of the biggest obstacles we see in building a powerful network is that people are conditioned to quickly “sort” people and organizations based on where they stand on a given issue. When this happens, often the context (urban/rural, state/region, etc) for folks’ positions is ignored. All that said, one of the things we’ve heard over and over again from organizers and teachers is that they wanted IDEA to share the more nuanced take on the key issues that was bringing the network together.

5. **Outcome mapping offers a methodology that “maps” well to IDEA’s values and practices.** Created as an evaluation and monitoring system that focuses on learning and building adaptive capacity, Outcome Mapping tracks the behavioral changes of an organization’s key “boundary partners” as a result of the organization’s involvement. It is explicitly designed to avoid the need for non-profits or development organizations to take “credit” for work in communities that is not theirs alone, while also providing language and data that can show the real influence of an organization’s capacity building efforts. IDEA is evaluating Outcome Mapping and considering using it as the primary methodology to tie all of our efforts together with a powerful and credible set of evaluation and monitoring practices.

“Democracy is a non-stop experiment in the strengths and weaknesses of our political institutions, local communities, and the human heart—and its outcome can never be taken for granted.”

Potential Barriers: What might get in the way

1. **Relying on a frame of democracy although it’s a contested concept.** Strange as it is to write, the truth is that people on the left and right of America’s political divide have different definitions of democracy. We think this is important because in connecting democracy and education there is room for everyone in the public conversation about the purpose of education. Maybe this frame won’t stick, maybe it is too threatening, maybe it just won’t work.

2. **Stretching our efforts too wide or too thin.** The aim to create a framework that is both inclusive and meaningful brings with it the risks of being too inclusive or losing substance. Focusing on supporting and strengthening existing efforts and networks can offer rapid momentum but also make for ties that are too loose for trying times.

3. **Becoming just another organization making money on the dysfunction of the current system.** This concern has been brought to us by a handful of educators and community leaders using various ways to describe the phenomenon where organizations start with great promise and grow into thriving businesses but lose track of their mission. One said, “The U.S. educational system has an exceptional ability to sterilize, and co-opt even those with great intentions. Resist the temptation to turn your head (lose focus), and stand for something meaningful and potent.”

4. **Network building doesn’t lead beyond network building.** Connecting the dots is a critical first step -- but those connections have to do more than just build a network of educators, young people, and community leaders. The message has to materialize into changes in practice and policy. So many folks already suffer from “reform fatigue” -- buying into an effort and then being disappointed when it doesn’t really change anything -- that we have a small window in which to prove that we’re about tangible change.

5. **Failing to engage our base in macro-level efforts.** An educator told us recently, “I just haven’t looked up in a long time.” He was sharing that he was so focused on his day-to-day work that he hadn’t been looking or thinking about the bigger picture of education. Many of our best community leaders, parents, young leaders, and educators are so busy reacting to the news of the day and taking care of immediate community needs that they may avoid getting involved in larger-scale change efforts. It can be challenging to commit the time and energy needed to collaborate more deeply than simply exchanging links or Facebook comments. If we’re unable to inspire already busy people to form a diverse, dispersed, and active network, IDEA’s ability to contribute to national education change will be limited.
Help Needed: What can make IDEA thrive?

1. Be IDEA. There are lots of ways to engage:
   • Join in curating resources -- organizations, blogs, lesson plans, articles, etc. -- and submit them to the Eduvation Library.
   • Complete an online journal entry telling us about an impact that you’ve contributed to, the strategy you used, and what you learned.
   • Spread the word about the work IDEA is doing and be part of our online networks on Twitter and Facebook.
   • Apply to be an IDEA organizer.
   • Raise funds and build a team to create an Innovation Tour in your town, state, or region.
   • Find your voice and use IDEA’s tools and network to support your efforts.

   “I am encouraged by the movement that IDEA is spurring into life and, in my twenty-second year in education, am excited by the possibility of contributing to deepening our collective thinking about what schools and schooling can be about.”
   - John McCluskey, Assistant Principal of Jefferson County Open School, Lakewood, CO

2. Grow IDEA.
   Connect with the IDEA organizers near you, suggest IDEA as a possible partner in your existing efforts, do some of your own mapping and share your learning with us, hold a house party or help us raise funds online.

3. Give to IDEA.
   Your financial support gives IDEA stability, momentum, and the resources we need to do the work outlined here. We know there are lots of great organizations worthy of support. Can you make IDEA one of your top 3 giving priorities?
In closing

In a conference workshop introducing IDEA in Providence, Rhode Island, a young woman from Mississippi said, “You don’t need folks to care -- you need folks to care again.” Her point was one that has resonated with us ever since: That teachers, elders, even young people are exhausted by empty promises about change.

But this moment is not asking for more empty words. Instead, it’s asking that we all roll-up our sleeves, again, and risk the pain that comes with taking responsibility for our communities. This moment asks that each of us pay attention to what is happening and make the critical connections needed to reclaim the “public” in public education for all young people.

It is time for the story of young people, educators, families, and communities to be told.

This is going to take some sacrifice. It will take time, energy, and money. It will take the releasing of organizational agendas and egos. And it will have to be much bigger than any one IDEA or organization. It is the work of ordinary people (not superheroes), networks, schools, communities, and organizations coming together.

There is an opportunity to make an economic, social and educational impact that could bring renewed vitality and depth to the life of this country. The promise of the United States rests on how its young people, leaders, communities, and institutions respond to a time of unyielding economic, social, cultural, educational, and technological change.

In the words of Vito Perrone, a champion of the kind of democratic education the world should know about, “We can do this.”

And working together, we will.
Appendix

Organizational History

Dana Bennis and Melia Dicker met at the 2003 International Democratic Education Conference (IDEC) in Troy, New York. Late at night and between sessions, they dreamt together about building a national organization that could catalyze meaningful educational change based on democratic values and human rights.

Soon Dana and several other young educators accepted an invitation from Israeli educator Yaacov Hecht to travel to Israel to learn about the work of the Institute for Democratic Education (IDE) based in Tel Aviv. Yaacov connected Dana to New York City educator Jonah Canner, and they began meeting with each other, and with Melia, to put the pieces together.

Their vision was of an organization that would redefine democratic education and direct its message outward, to the general public. A core belief was that the best way to effect widespread change was to collaborate with students, educators, and policymakers in a variety of settings. They also believed in the need to bridge conversations around social justice, student voice, and sustainability.

In March 2009, The Bay and Paul Foundations funded a four-day vision and planning session that led to the incorporation of IDEA and a developing strategy. Dana Bennis served as IDEA’s founding director and secured two-year funding commitments from The Bay and Paul Foundations and the New Visions Foundation for planning and launch years. IDEA launched publicly in May 2010.

Dana and the Board of Directors recruited Scott Nine to serve as the organization’s Executive Director starting in July 2010. Over the next 2 years, IDEA’s staff traveled to conferences and events to network and build relationships, and we piloted our Innovation Tours, organizing, and online resources. During that time the board grew significantly, including noted education author Kirsten Olson, Puerto Rican educator Justo Méndez Arámburu, and long-time international development expert Ramón Daubón, who have been central to the organization’s growth.

In the spring of 2012, IDEA had 5 staff and 26 organizers impacting more than 30 educational organizations, 22 states and Puerto Rico.
## Milestones

### IDEA Events and Successes

<table>
<thead>
<tr>
<th>Event</th>
<th>Date</th>
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</thead>
<tbody>
<tr>
<td>IDEC 2003 and education trip to Israel - Dana and Melia meet and begin working together</td>
<td>2003</td>
</tr>
<tr>
<td>Launch Pad Retreat</td>
<td>Fall 2008+</td>
</tr>
<tr>
<td>IDEA is incorporated</td>
<td>Nov 2008</td>
</tr>
<tr>
<td>IDEA Launches publicly with “Make Your Voice Heard” video</td>
<td>Feb 2009</td>
</tr>
<tr>
<td>Facilitated Jefferson County Open School and Nuestra Escuela exchange (first tangible activity)</td>
<td>March 2009</td>
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<tr>
<td>Release of first Strategy Doc; Paul Batalden, IHI, and Parker Palmer</td>
<td>June 2009</td>
</tr>
<tr>
<td>First IDEA Tour in NYC (impact we designed for)</td>
<td>July 2009</td>
</tr>
<tr>
<td>Strong response to call for IDEA Organizers (validation - we're on to something), Melia &amp; Scott attend SOS</td>
<td>May 2010</td>
</tr>
<tr>
<td>IDEA Camp convenes organizers in Puerto Rico</td>
<td>Oct 2010</td>
</tr>
<tr>
<td>1st 150K matching challenge met with help from IDEA Organizers</td>
<td>Nov 2010</td>
</tr>
<tr>
<td>IDEC 2012 in Puerto Rico</td>
<td>April 2011</td>
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<td>June 2011</td>
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<td>July 2011</td>
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<td>Sept 2011</td>
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<td>Oct 2011</td>
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<td>Jan 2012</td>
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<td></td>
<td>Feb 2012</td>
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<td></td>
<td>Mar 2012</td>
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### Cultural & Education Markers

<table>
<thead>
<tr>
<th>Event</th>
<th>Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Economic Depression/Recession - Foreclosure - Bailouts - ARRA (hooked Common Corp)</td>
<td>2003</td>
</tr>
<tr>
<td>Obama's election</td>
<td>Fall 2008+</td>
</tr>
<tr>
<td>Tea Party movement emerges</td>
<td>Nov 2008</td>
</tr>
<tr>
<td>Common Core State Standards Initiative announced by the National Governors Association and the Council of Chief State School Officers</td>
<td>Feb 2009</td>
</tr>
<tr>
<td>Race to the Top announced</td>
<td>March 2009</td>
</tr>
<tr>
<td>Failure of Congress to solve Debt Challenges - low point in public faith in gov't</td>
<td>June 2009</td>
</tr>
<tr>
<td>Waiving of NCLB with conditions; Occupy movement</td>
<td>July 2009</td>
</tr>
<tr>
<td>U.S. election year intensity begins ramping up</td>
<td>May 2010</td>
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<tr>
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<td>Nov 2010</td>
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<td>April 2011</td>
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<td>June 2011</td>
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<td>July 2011</td>
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<td>Sept 2011</td>
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<td></td>
<td>Oct 2011</td>
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<td></td>
<td>Jan 2012</td>
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<tr>
<td></td>
<td>Feb 2012</td>
</tr>
<tr>
<td></td>
<td>Mar 2012</td>
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Leadership Team

Board of Directors

Santiago Rincón-Gallardo, President
Consultant for the Mexican Ministry of Education; visiting scholar at the Ontario Institute for Studies in Education; doctoral candidate at Harvard Graduate School of Education

Dana Bennis, Vice-President
Co-founder and Director of Research and Programs at IDEA

Robert Davis, Treasurer
Founder and CEO of The Bridge Companies

Kirsten Olson, Past-President
Author and Chief Listening Officer at Old Sow Consulting

Melia Dicker, Member
Co-founder of IDEA; partner at Creative Distillery, Public Allies alumna and board member

Justo Méndez Arámburu, Member
Founder and Executive Director of Nuestra Escuela

Natalia Rosado, Member
Student leader at the University of Puerto Rico, IDEA Organizer

Ramón Daubón, Member
President of the Esquel Group, Washington, D.C. and Visiting Professor at Universidad Sagrado Corazon in Puerto Rico

Stephanie Rogen, Member
President and Founder of Greenwich Leadership Partners

Scott Nine, Member
Executive Director of IDEA

Staff

Dana Bennis, Director of Research and Programs

Jeanette Miller, Director of Operations

Scott Nine, Executive Director

Shawn Strader, Administrative and Development Associate
Research Fields that Inform What We Do

We store the research we believe has the most significance in the Eduvation Library, but here is a growing list of the research fields we pull from and that together create the foundation of democratic education:

- Education for Sustainability
- Neuroscience and Brain-Based research
- Self Determination Theory
- Critical Literacy and Social Justice
- Youth Voice and Engagement
- Strength-based Therapeutic Intervention
- Adult Learning, Retention, and Mattering
- Self-Directed Learning in Youth and Adults
- Gross National Happiness Research
- Innovative Business Practices and Democratic Workplaces
- Contemplative Studies
- Participatory Action Based Research
- Asset Based Community Development and Community Mapping
- Place-based Education and Ecopsychology
- Nature-based Mentoring and Outdoor Learning
- Positive Psychology
- Human Motivation and Learning
- Multiple Intelligences and Social and Emotional Intelligence
- Motivational Interviewing
- Anthropological Research into Learning and Cultural Development
- Systems Thinking
- Human Rights and Citizenship Education
Organizations IDEA’s network reaches

This is by no means an exhaustive list - but hopefully paints a picture of the reach and relationship built over two years.

- Boggs Center for Nurturing Community Leadership
- Boggs Educational Center
- Burlington School District
- City of Caguas, Puerto Rico
- Education Cities, Israel
- Calhoun School
- Center for Courage and Renewal
- Business Innovation Factory
- Center for Ethical Leadership
- National Community Learning Exchange
- Central Arkansas Library System
- Clinton School of Public Service
- City Club of Portland - Agora Committee
- Chicago Freedom School
- Communities for Public Education Reform
- Compass School
- EarthWalk Vermont
- Education Circle of Change (via Spirit in Action)
- Edutopia - The George Lucas Educational Foundation
- Facing History and Ourselves
- Fairest
- No Right Brain Left Behind
- Flamboyan Foundation
- Forum for Education and Democracy
- Goddard College
- Grantmakers for Education
- Harwood Union High School
- Hewlett Foundation
- American Indian Institute
- Institute for Educational Inquiry
- Institute for Educational Leadership
- Institute for Humane Education
- Justice Matters
- La Fundacion Comunitaria de Puerto Rico
- Lewis and Clark College
- MAAP: Minnesota Association of Alternative Programs
- Multnomah County Youth Commission
- National League of Cities
- Alliance for Education Justice
- Allied Media Project
- Annenberg Institute for School Reform
- Ashoka: Empathy Initiative
- Sapientis
- NYCLU
- Baltimore Algebra Project
- National Student Bill of Rights Network
- Education for Liberation and the Free Minds, Free People Conference
- The Bay and Paul Foundations
- Rowland Foundation
- Big Picture Schools
- National Parents for Public Schools
- National Youth Rights Association
- NEA + AFT
- Nellie Mae Education Foundation
- New England Secondary School Consortium
- New Mexico Community Foundation
- North Dakota Study Group
- Northwest Passage High School
- NoVo Foundation
- Noyes Foundation
- NYCORE
- PassageWorks
- Schott Foundation’s Opportunity to Learn Campaign
- Dignity in Schools
- Progressive Education Network
- Project South
- Public Education Network
- Quality Education as a Constitutional Right
- Rethinking Schools
- Science Leadership Academy
- Self Enhancement, Inc.
- Shelburne Farms: The Promise of Place
- Rural School and Community Trust
- School Reform Initiative
- Teaching for Change
- Transformational Educational Systems Alliance
- Vermont School Boards Association
- What Kids Can Do
- YATST: Youth and Adults Transforming Schools Together
- YES! Magazine
- Young People’s Project
- Oregon Center for Educational Equity
- Save Our Schools
- EdEvolving
- EdVisions
- Project School Foundation
- Parents for Public Schools
- National Parent Teacher Association
- University of Texas Educational Policy Center
- Stanford Center on Opportunity Policy in Education
- National Equity Project
- Fund Education Now
- The Center for Children’s Learning
- The North Dakota Study Group
- The International Democratic Education Conference
- Movement Strategy Center
- Collaborative for Emotional, Social, and Emotional Learning (CASEL)
Organizing Structure and Strategy

Overview of IDEA Organizing

In 2010-2011, we took our first steps with an organizing model that sought to work with existing organizers and educators. The early thinking was that we would identify “regional organizers” that would be contracted for 5-7 hours a week to “connect the dots” about what was happening in their part of the country. Ten organizers is what we could afford and the regional strategy was built on US Court Districts with the idea of modeling our growth through a frame similar to other national organizations that eventually do policy advocacy. When we received applications, we selected the ten best applicants to become organizers. They worked in one of three focus areas: local contexts or specific networks, regional, or national. The focus of the first year was to observe and encourage organizers to listen and just try to make sense of what was happening in their work with education.

With more than 500 1:1 conversations conducted and macro-level networking happening with IDEA’s staff, the model was moved forward for 2011-2012 with the selection of 20 community organizers and 6 digital organizers. The concept behind digital organizing was to put energy into telling the stories of community organizers and to build a stronger digital presence. Organizers committed to 5-7 hours per week.

One key change for the second year was bringing all of the organizers and staff together for IDEA Camp. We decided to group the organizers into teams because the 1:1 mentoring workload was beyond Scott’s capacity, given the increased number of organizers, and the organizers were excited about the collaborative potential of teams.

The 2011-2012 year brought lots of learning about organizing in teams. As the year wrapped up, each of the 6 organizing teams completed an extensive review that generated information about needs, hopes, design possibilities, and more. At the same time, we shared Outcome Mapping with organizers as a tool for sharing learning and impact, as staff considered how to incorporate Outcome Mapping into organizing throughout 2012-2013.

The goals of IDEA organizing and digital organizing have not changed much, but the process for how to reach those goals is evolving. The remainder of the document outlines the proposed changes for the next two years.

Why Organizing?

We recognize a significant gap in communication between youth, parents, educators, activists, and policy makers. With poor communication also comes little coherent action.

Community organizing is a time-tested model that we think can be well utilized, along with digital organizing, to generate a powerful catalytic effect in the lives of folks most directly experiencing challenges and wanting change.

The Goals of IDEA Organizing

1. Make the critical connections, online and in person, between young people, educators, parents and families, community organizers, school leaders, networks and organizations, policy makers, and media.

2. Strengthen existing efforts through networking and collaboration.
3. Grow the capacity of people to reclaim the “public” in public education.

4. Tell the stories and showcase examples of democratic education in action.

5. Support people and organizations to take strategic, collaborative, and courageous action.

**Plan for Organizing: 2012-2013**

We will create ten organizing teams that will generally follow the rhythm and structure of a Learning Breakthrough Series (see more at the Institute for Healthcare Improvement) while developing, executing, and evaluating specific strategies for each team’s area of focus.

The first seven teams listed are focused on developing and implementing strategies to meet the outcome challenges set with IDEA’s “boundary partners” (the people we count on to make change) by connecting with people, networks, communities, and organizations across the country.

The place-based organizing team is made up of leaders of local organizing teams in places where IDEA is working more deeply. Each of those leaders will then create teams in their local areas to build relationships across networks, organize strategically, and create Innovation Tours. For 2012-2013, this larger team will consist of leaders representing organizing teams in Vermont, Oregon, Puerto Rico, Minnesota, New York City, and possibly Maine, Michigan, Jackson (MS), New Orleans (LA), and Little Rock (AR). This structure allows for new teams to emerge mid-year and allows for the development of more Innovation Tours and local organizing teams without being overly limited by IDEA’s staff capacity.

The digital organizing team will follow a similar structure as the first seven teams but their focus will be on weaving across each of the organizing teams and getting the powerful stories told and shared. Acting like a rotating team of media consultants, this team will have a unique and important set of responsibilities.

The IDEC 2013 team will bring together 3-6 organizers to create relationships and design an organizing and learning space for IDEC 2013 that can make the most of the opportunity to convene people across the U.S. with international youth leaders, educators, and organizers.

**Organizing Teams by Boundary Partners:**

- Young People
- Parents and Families
- Teachers and People who Work with Youth
- Schools and School Leaders
- Organizers, Networks, and Organizations
- Other Actors that Influence Schools
- Media

**Additional Organizing Teams:**

- Place-Based Organizing (with sub-teams by location)
- Digital Organizing
- IDEC 2013
Team Structure and Budget

A national call and recruitment effort will take place to seek “IDEA Organizers” to participate in these teams, with all prior IDEA Organizers invited to apply. Each team will be led by a Senior Organizing Fellow. These leaders will be given significant autonomy and support in developing the team of organizers they think will be most effective in mapping out the area of focus, developing shared strategies, and engaging with their own networks or communities in using and learning about them. Each Senior Organizing Fellow will be given a budget for travel expenses for a team of three to six members, a small discretionary fund, and some money for additional organizer stipends.

A sample budget for 2012-2013 looks like this:

<table>
<thead>
<tr>
<th>Expense</th>
<th>Amount</th>
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</thead>
<tbody>
<tr>
<td>Senior Organizing Fellow Stipend</td>
<td>$2,000.00</td>
</tr>
<tr>
<td>Stipend Fund for other organizers</td>
<td>$1,000.00</td>
</tr>
<tr>
<td>Travel (for 3 x 2 gatherings)</td>
<td>$5,460.00</td>
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<tr>
<td>Discretionary</td>
<td>$500.00</td>
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<tr>
<td><strong>Total</strong></td>
<td><strong>$8,960.00</strong></td>
</tr>
</tbody>
</table>

IDEA Organizers will no longer be asked for 5-7 hours a week commitment. Instead, the time commitment will be more fluid but marked by some defining expectations:

1. Participating in a five-day “IDEA Camp” that will bring up to 3 members of each team together to build relationships, map, strategize, and plan for the year.

2. Actively working with existing networks, groups, or organizations to implement the strategies developed. Under the banner of “all teach all learn,” the strategies can and should be adapted to each community or context. The critical commitment is that the organizer share any impact and learning that is happening. This will take place via online journals and every other month meetings across the teams.

3. Participating in a series of mid-year calls that seek to recalibrate, tune, and re-strategize within the team based on the learning being done.

4. Attending, as funds allow, a five-day gathering at the end of the year (June, July, or August) to consolidate learning, evaluate, and strategize going forward while continuing to build relationships across the IDEA network.

5. Making use of Batchbook, IDEA’s database of relationships, to stay up to speed, share information, and strengthen connections.

Place-based Organizing Teams

IDEA is committed to organizing by place. The relationships, context, and reality of real communities is where, at the end of the day, the most significant and lasting change occurs. We want to work with partner organizations in local communities, states, and regions that see value in the Innovation Tours and IDEA’s organizing model as ways to connect the dots and catalyze the potential of more strategic local partnerships.

Place-based organizing group leaders create teams in their local areas to build relationships across networks, organize strategically, and establish Innovation Tours.

While each partnership may need to be negotiated different, here is a general budget and structure for the partnerships we are creating.
Structure of Place-based Organizing Partnerships

• Each place-based organizing team will:
  • Build a group
  • Relationship-build with individuals, groups, and potential tour sites
  • Develop a tour in the first year
  • Use Batchbook (CRM tool) to support strong collaboration across IDEA’s network.

IDEA supports placed-based organizing teams by:

• Providing strategy, tools, and materials for organizing and tour building
• Cross connecting with other local groups around the country
• Regular group calls - video, conference calls
• 1-1 calls with staff and/or lead organizing fellow
• Use of our logo and ability to say they are part of the national IDEA network
• Use of Batchbook and video web tools
• Advertising and communication support
• Participation and integration with IDEA’s other organizing efforts, including support for attendance at IDEA Camp

Generating Financial Support for Organizing

While it was previously discussed that IDEA could move to a model where individual organizers would grow into generating funding for their work over a two or three year period, this new structure makes a different direction possible. Each organizing team will be expected and supported, as part of its strategy development, to identify ways to fund their activities and teams over time. By growing focused teams, IDEA will be better able to target specific funders and IDEA organizers can work collaboratively to grow the base of support for their work.

Brief Rationale for Organizing Changes

There is no question that there are hundreds, thousands even, of educators and organizers doing incredible work in their communities to advocate, nurture, or seed democratic education (even if they don’t use or have never heard of that frame). IDEA’s Organizers have spoken powerfully about the need for helpful structures and leadership, for increased focus, autonomy, and creativity, and for the ability to really movement build and strategize together. We believe the structural and leadership changes in this new approach can best tap into the energy and commitment of young people, educators, and organizers.

One of the biggest changes is moving away from paying individual stipends to each organizer and moving more towards a leadership development and team model. We hope this change unlocks the potential of organizing efforts so that financial constraints don’t hinder the work that can happen across the country -- while also trying to make financial commitments to teams and communities to grow their work over time.
Learning Breakthrough Series

Adapting the Institute for Healthcare Improvement’s Breakthrough Series to education provides the opportunity to bring together a cross-section of the education sector to collaborate on solving the key challenges we face. From the [IHI website](http://www.ihi.org):

The Institute for Healthcare Improvement developed the Breakthrough Series to help health care organizations make ‘breakthrough’ improvements in quality while reducing costs. The driving vision behind the Breakthrough Series is this: sound science exists on the basis of which the costs and outcomes of current health care practices can be greatly improved, but much of this science lies fallow and unused in daily work. There is a gap between what we know and what we do.

The Breakthrough Series is designed to help organizations close that gap by creating a structure in which interested organizations can easily learn from each other and from recognized experts in topic areas where they want to make improvements.

The same conditions exist in education: strong research and innovation currently exists but is not shared, and there are few opportunities for schools and organizations to work together in a sustained way. Here is an outline of the 12-15 month Learning Breakthrough Series we envision:

**Prep/Seeding**
- Select Leader
- Cultivate partnerships for the process

**Pre-conference**
- Team Leader selected to chair the process
- They pull in research experts and content experts to “map the systems in play” and set the focus for the breakthrough series
- Takes place in the spring
- Identifies organizations and relationships to connect to Learning Session A

**Learning Session A**
- Online connections happen September 1
- One week in person early October (IDEA Camp)
- One week of online follow-up
- Parties brought together map the system in play (promoting and inhibiting forces)
- Develop protocol and implementation plan

**Implementation/Engagement**
- “All teach, all learn”
- Implement strategies/practices/protocols from fall to March
- 1:1’s take place
- Group using Outcome Mapping Journals to capture impact and learning
- Meet as needed (no set commitment)
- Seek feedback with focus on mastering for complexity
Learning Session B

• 5 day meeting in person in March
• Online collaboration on either side
• Share, re-map, re-vision
• New protocol and implementation plan

Implementation/Engagement

• “All teach, all learn”
• Implement strategy/practice/protocol from March to June
• 1:1’s happen
• Group using OM Journals to capture impact and learning
• Meet as needed (no set commitment)
• Seek feedback with focus on mastering for complexity

Learning Session C and Summit

• Final 3-5 day gathering in the summer
• Present and publish findings, innovations, and successes
• Media and broad education community is invited
Introducing Outcome Mapping

A story to start from:

IDEA's Scott Nine was at a meeting of the Change Alliance in the Netherlands that he was invited to. He sought out a meeting with Fred Carden, Director of the Evaluation Unit for the IDRC, because Fred seemed smart and wise, and said interesting things in the large group. Scott posed this dilemma to Fred over lunch:

“IDEA is and wants to be a movement building organization. We don’t plan to offer programs or curriculum, we want to influence others. Our challenge is that we want to articulate our impact but don’t want to take credit for work that isn’t ours alone - or at all. How might we show what we are doing while strengthening - rather than messing up -- existing efforts?” (Note: likely the question was not formulated this well at the time :)

Fred went on to introduce Scott to Outcome Mapping and committed to share some links with him in follow-up. What stood out was Fred’s explanation that Outcome Mapping focuses you on what happens in relationships that you are in -- what you directly touch -- rather than asking you to monitor anything that could happen. Also, it was said to have a way of honoring different environments and complexity, rather than trying to eliminate those as variables. Scott shared back a summary with the IDEA team. Now, as we seek to name the impact IDEA is having while still holding all these values, we’ve delved into Outcome Mapping and are ready to share it with you.

Disclaimer about words and jargon:

No different than education, the world of Outcome Mapping and evaluation has a distinct vocabulary. The good news is that there is a clear effort to define the words in that vocabulary and make them more accessible. As this is an introduction, feel free not to know what things mean sometimes. We hope you’ll find learning about new words and concepts helpful, rather than frustrating.

So what is Outcome Mapping?

In brief, Outcome Mapping works on the principle that capacity building is essentially about people. It looks at how human beings relate to one another and to their environment. Most importantly, Outcome Mapping recognizes that change efforts are more likely to be successful when they devolve continuing responsibility to local people and to local institutions.

Outcome Mapping recognizes challenges beyond the scope of any one organization and helps to limit assessment to an organization’s direct sphere of influence. In this way, it pushes the organization toward increased risk-taking, with the view that risk-taking is a necessary condition for encouraging development.

Most frameworks to evaluate an organization’s impact are tied to a logic chain that tends to limit vision and scope by expressly linking an organization’s modest activities to some larger impact. This usually reduces the potential for collaboration and real capacity building, as the organization begins forcing linkages to show how its activities create a measurable result. Outcome Mapping encourages an organization like IDEA to think of itself as a dynamic organization whose goals, methods, and relationships with partners need to be reconsidered and adjusted regularly.

Some resources to learn more about Outcome Mapping in general:

• Links to a 2-page and 4-page downloadable brochure
• Introductory video about Outcome Mapping for a comprehensive overview
• Link to Outcome Mapping Community (presentations, articles, case studies, videos, facilitators guide, and more)
• Link to Comprehensive Facilitator’s Guide to Outcome Mapping
References


EPE Research Center. (2012). Diplomas Count 2012. http://www.edweek.org/ew/toc/2012/06/07/index.html Statistics are for the class of 2009, the most recent year that full data is available.


## Income

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## Expenses

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