



# **Organized Religion and Civic Culture:**

*Final Report from a Strategic Review*



Rainbow Research Inc.



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*Final Report from a Strategic Review*

*Prepared for*

**The James Irvine Foundation**

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# Organized Religion Strategic Review

## *Final Report*

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## INTRODUCTION

From June 2000 through March 2001, Rainbow Research led a strategic review for the James Irvine Foundation's Organized Religion portfolio. The portfolio had been partnering with faith-based institutions to draw new and lower-income Californians into greater civic engagement since 1996. The purpose of the review was to update and improve the conceptual framework or "logic model" for the portfolio, and develop a framework to help guide evaluation and learning efforts. The strategic review was intended to be useful to the Irvine Foundation, other foundations in the arena of civic culture and faith-based institutions, and current and prospective community partners of Irvine's portfolio.

The review process included (a) a retrospective assessment of the portfolio's early experience, drawing on grantee interviews and examination of relevant Foundation and grantee documents; (b) a literature search and interviews with leading practitioners, analysts and funders in the field of faith-based civic engagement, to identify key trends, challenges and opportunities relevant to the next phase of this portfolio; and (c) collaboration with Irvine staff and community partners to articulate and refine the logic model with its key assumptions, strategies and outcomes expectations, and an appropriate evaluation framework for the portfolio. An evaluation team, including Irvine program staff and evaluation staff, two representatives from the current portfolio's grantees, and consultants David Scheie and T. Williams of Rainbow Research, led the strategic review process.

Rainbow Research is a nonprofit organization that provides evaluation and effectiveness assistance to "socially concerned organizations." We work with diverse partners including community groups, nonprofit organizations, faith-based institutions, foundations and public agencies. Based in Minneapolis and active nationally since 1974, Rainbow Research specializes in projects that bring ordinary citizens and residents to the center of community life and public problem solving, and in approaches that build capacity through participation in research and evaluation

This document presents results from the strategic review. It is organized into five sections: a summary of portfolio achievements to date; findings from the field scan and literature review; the new logic model for the portfolio; the evaluation framework; and issues for consideration as the portfolio moves forward, with recommendations for key program priorities and initial evaluation implementation. Appendices list literature and websites reviewed; persons interviewed or included in community review meetings or the evaluation team; agendas and materials for evaluation team and community review meetings.

## **PORTFOLIO ACHIEVEMENTS, 1996-2000**

Grantees in the Organized Religion portfolio achieved substantial accomplishments during the first years of this portfolio, 1996-2000. Our review of 36 grant reports from 13 grantee organizations found numerous impacts on communities, institutions and individuals. Some highlights:

Public policies were changed at the state, county, city, and school district levels, on important public concerns ranging from criminal justice and education to housing, economic development and health care.

Private financial institutions, housing developers, and service agencies were also influenced.

Faith-based civic engagement (FBCE) organizations and networks formed in several communities and grew larger in others.

The pool of professional faith-based community organizers grew larger, and major FBCE networks strengthened their recruitment and professional development practices.

Partnerships were formed between several higher education institutions and FBCE structures for documentation, evaluation, and continuing education.

Thousands of individuals have participated in citizenship and leadership training, and thousands have also exercised their civic capacities through participation in public events.

The following pages list achievements culled from grantee reports. This is not a complete inventory, but enough to give a flavor, we hope, of the results from the early years of this portfolio. Findings are grouped in the following categories, paralleling the emerging “logic model” for the portfolio:

### Community

- Policy and systems change

- “Bridging” relationships

- More communities have FBCE organizations

### Institutional/FBCE

- FBCE organizations add institutional members

- Pool of faith-based organizers grows bigger and more capable

### Institutional/Knowledge-building institutions

- More FBCE/KBI partnerships and stronger KBI partners

- New knowledge relevant to FBCE practitioners is produced

### Individual

- More individuals go through leadership/citizenship training

- More individuals participate in civic affairs

Implications for evaluation planning from this reports review are discussed in the “Evaluation Framework” section later in this document.

**Key to listings:** Each citation begins with the name or acronym of the organization from whose grantee report the finding was drawn. Listings are alphabetical by grantee organization. Acronyms include:

CEEP: Center for Ethics and Economic Policy

FAITHS: Foundation Alliance with Interfaith To Heal Society

IAF: Industrial Areas Foundation

LAM: Los Angeles Metropolitan Churches

LAM/UAAMAC: LAM/United African American Ministerial Action Council

OCC: Oakland Coalition of Congregations

OTC: Organize Training Center

PICO: Pacific Institute for Community Organization

USC/CRCC: University of Southern California, Center for Religion and Civic Culture

## **Community**

### ***Policy & systems change***

Summary: Gains in criminal justice, education, youth development, housing and small business finance. Impacts on counties, school districts, state legislation, and private financial institutions.

#### *Criminal justice/education:*

- LAM: Passed state law AB 743, in 9/98, creating a pilot project to mandate ex-offenders to participate in GED training as a condition of probation. (10/00 report)
- LAM/UAAMAC: San Diego County Board of Supervisors passed a resolution, 1/00, to establish a program mandating that ex-offenders on probation make progress toward earning a GED as a condition of probation completion.
  - a) County has approved a \$500,000 annual budget to fund law enforcement in the initiative.
  - b) Adult education officials have agreed to provide funding for teachers for the initiative.
  - c) County district attorney and superior court have agreed that all ex-offenders that earn their GED will have their felony dismissed.
  - d) District attorney and judge have agreed to start the first “education courts” in the U.S. These

will be modeled after drug court. (10/00 report)

- Proyecto Pastoral: Its Safe Passage Campaign, in fall 2000, won commitments for safety improvements from the City of Los Angeles:
  - a) Los Angeles Housing Authority provided walkie talkies that are directly connected to LAPD, Dolores Mission Church, School and all Proyecto programs.
  - b) The Mayor's office committed to install speed bumps in the Boyle Heights neighborhood to deter high-speed, drive-by shootings. (12/00 report, pp. 2,8)

*Youth development:*

- IAF: United Neighborhoods Organization secured a commitment in 1997 from Los Angeles Mayor Riordan to help locate city funds for Hope in Youth, a gang-prevention program. (6/97 report, p.2)
- LAM: State committed nearly \$2.3 million, in 7/00, to construct Antes Columbus Stadium, the first of four youth soccer stadiums sought by LAM to help bring together African Americans and Latinos in South Los Angeles. The stadiums will house various soccer clubs, full concessions stands and soccer shops run by the youth themselves. (9/00 report)

*Housing and economic development:*

- IAF: Local social service agencies in Solano County committed in May 2000 to help replicate SVOC's nationally-recognized welfare-to-work program in Solano County. The plan includes joint child care and job training programs to be initiated by SVOC at churches in low-income neighborhoods of Solano County. (6/00 report, p.4)
- IAF: Ralph's Market reached an agreement in 1997 with Southern California Organizing Committee to employ residents from some of the most devastated areas in South Central Los Angeles. (6/97 report, p.1)
- OCC: Three financial institutions (Bank of America, Washington Mutual and Wells Fargo) committed, in 10/98, to lend \$8,000,000 in 25 census tracts in Oakland for homeowners and small businesses. The three institutions made a commitment to partner with OCC for two years to increase the number of homeowners and loans to small businesses. The goal is to secure loans for 300 individuals, families and businesses over the two years.

Results, as of 12/00: at least \$17.6 million in homeownership loans, for 397 homes, and \$20.5 million for 279 small business loans. (12/00 report).

*Education:*

- PICO: Assisted in passage of \$9 billion state bond-issue for construction and improvement of public schools throughout the state. (4/00 report)
- PICO: Assisted in passage of state legislation for creation of after-school academic enrichment programs, with \$50 million appropriated. (4/00 report)

- PICO: Assisted in passage of state legislation to fund creation of school-to-work transition programs in high schools throughout the state. (4/00 report)
- PICO: Worked to secure state legislation creating Teacher Home Visiting Programs throughout the state, modeled after the successful program created by ACT of Sacramento (a PICO affiliate) in that community. (4/00 report) Staff and leaders of ACT subsequently helped implementation of this new policy by staging two regional training sessions, in northern and southern California, for qualifying school districts.

*Health care:*

- IAF: Bay Area Organizing Committee stopped proposed cuts at Laguna Honda Hospital in 1997. (6/97 report, p.1)
- PICO: Persuaded the governor, in June 2000, to approve a \$50 million funding increase for physical improvements and expansion of community health clinics. (10/00 report p.4)
- PICO: Secured passage in the state Assembly, in summer 2000, of a bill to use tobacco settlement funds to secure access to health care for the families of California. The bill did not get voted on in the Senate that session, but PICO secured a commitment from the Senate President to reintroduce and work for its passage in 2001. (10/00 report, p. 5)
- Proyecto Pastoral: Persuaded Department of Mental Health's Community Counseling Services to begin providing mental health services in Boyle Heights, two days a week, in 2000. (12/00 report, p.3)

***“Bridging” relationships***

- IAF: 85 institutions, including congregations, unions, schools, community development corporations and service agencies, are participating in the sponsoring committee for a new metropolitan organization for the Los Angeles area. (6/00 report, p.1)
- IAF: In Sacramento, the Immigrant Legal Resource Center, Legal Services of Northern California, Catholic Charities of Sacramento, Sacramento Valley Organizing Community (SVOC, an IAF affiliate), and the local affiliate of the Spanish-speaking TV network Univision have collaborated since 2000 on a series of public forums called “Immigrant Education in the City of Sacramento.” (6/00 report, p.3)
- LAM/UAAMAC: Criminal justice officials, social service agencies, church leaders, county supervisors and adult education officials are collaborating on the GED initiative. (10/00 report).  
E.g.
  - a) working group includes public defenders office, superior court, county supervisor, adult education officials, and church leaders.
  - b) GED classes will be taught by teachers and sited in regional adult education facilities, community centers, and local churches.

- LAM: Participants in GED Initiative program design included representatives from the county, school systems, and churches: Los Angeles County Probation Department, District Attorney's Office, Public Defender's Office, churches, and adult education officials from two school districts in the county. (10/00 report).
- Santa Barbara Faith Initiative: Members of the faith community participated in an affordable housing Strategic Development Task Force, along with members of the City and County Housing Authority, City Planning Commission, City Council, staff from the County Supervisors office, and private developers, in March 2000. The Task Force drafted a document of consensus for criteria to be used to evaluate proposed affordable housing projects. (10/00 report, p.2)
- Santa Barbara Faith Initiative: the Initiative organized a "New Paradigm Task Force" in September 2000 for affordable housing planning and development, with representatives from the religious, nonprofit, for-profit, government, environmental and citizen sectors. (10/00 report, p.3)

***More communities have FBCE organizations***

- PICO: 4 communities formed local Sponsoring Committee for new PICO affiliate organization in 1999: Berkeley, Hollywood, Long Beach, and north San Diego County. Berkeley hired a part-time organizer. Hollywood committee secured incorporation. Long Beach committee had over 20 pastors and congregational leaders. San Diego hired a full-time organizer. (10/00, 4/00 reports)
- PICO: In 2 other communities, East Los Angeles and Marin County, informal groups of church leaders began sending pastors and community leaders to PICO national leadership training sessions in 1999-2000. (4/00 report)
- Santa Barbara Faith Initiative: The Initiative, begun in 1998, had about 20 people from about 10 faith-based organizations consistently attending monthly meetings by the end of 1999. (7/99 report, p.1; 12/99 report, p.2)

## **Institutional/FBCE**

### ***FBCE organizations add institutional members***

- LAM: added 3 churches into membership, 97-99 (3/99 report).

### ***Pool of faith-based community organizers expands and grows more capable***

- PICO: Professional development for organizers and directors:
  - a) Weeklong training for all directors and organizers in national network held in June 1999. Newer organizers (with 2 years or less of experience) were grouped in a special track where they were mentored by experienced organizers and directors.
  - b) Two 3-day professional development sessions, geared especially for organizers and directors with less than 2 years' experience, were held in March 2000.
  - c) Individualized professional development plan is developed and pursued for every organizer and director in PICO California network, under Scott Reed, PICO Associate Director and coordinator of its professional development program. "The development/training needs of each organizer is assessed, and a far more methodical and intentional focus is being given to the training needs of each individual organizer." (10/00 report)
  - d) Orientation and Testing Program implemented in February 2000 in the Bay Area, and in September 2000 in San Diego: an intensive weeklong program in which prospective organizers are given orientation and observed under pressure and in a variety of situations. (4/00, 10/00 report) Four candidates went through the September program (count not given for February).
- PICO: Hiring more organizers: 7 new organizers were hired and placed in Riverside/San Bernardino (2), North San Diego County, San Diego (3), and Contra Costa County, in 1999-2000. All four went through the PICO Internship Program which provides training and support for new organizers. (4/00 report)
- Proyecto Pastoral: Two mothers in the Boyle Heights neighborhood, one a newly naturalized citizen and the other an immigrant, have worked as organizers for Comunidad En Movimiento since 1998, receiving leadership training as well as on-the-job experience for two years. (12/00 report, p.2)

## **Institutional/Knowledge-Building Institutional**

### ***FBCE/KBI partnerships***

- OTC: Vanguard University, an Assemblies of God-affiliated university in Orange County, is making community organizing a part of its academic curriculum and fieldwork placement training as a result of OTC's California Project with Evangelicals and Pentecostals. (3/99 report, p. 3)

- PICO: Relationship formalized between PICO and Jesuit School of Theology at Berkeley (JSTB), Graduate Theological Union at Berkeley (GTU), and Pacific School of Religion.
  - a) PICO leaders/staff began teaching classes, fall of 1999, in faith-based community organizing and theological underpinnings and implications of the PICO model of community organizing.
  - b) PICO expanded its role as a placement site for students in JSTB's Field Education Program, with several JSTB students placed at Oakland Community Organizations (OCO) in 1999-2000.
  - c) Fr. Joe Daoust, president of JSTB, has offered to help sponsor and implement PICO's annual National Clergy Caucus.
  - d) PICO's board president, Robert M. Holstein, Jr., now sits on JSTB's board, and JSTB's president, Fr. Daoust, joined PICO's board in October 2000. (10/00 report, p.6)
- PICO: Relationship formalized between PICO and Loyola Marymount University in Los Angeles, with Loyola Marymount becoming the site of PICO's national archives in 2000. PICO and LMU are collaborating to raise additional funds for further development of the archives and to create an oral history of faith-based organizing. (10/00 report, p.7)
- USC/CRCC: CRCC is credited in a *Los Angeles Times* article in fall, 2000, as a knowledge-building and knowledge-sharing partner of faith-based affordable housing efforts in Santa Barbara and prison literacy programs for Los Angeles Metropolitan Churches. Rev. Eugene Williams of LAM is quoted as saying, "If anyone wants to know anything about religious or church-based organizations, the center is the place to start." (12/4/00 report, p.2)
- USC/CRCC: CRCC is becoming a good-sized hub for applied research on faith-based civic engagement. It has nearly a dozen USC faculty associates, as of December 2000, from the sociology, political science and other departments; nine research assistants, four full-time employees, and two Senior Research Fellows from off-campus: one from Fuller Theological Seminary and the other from Food for the Hungry. Since its founding with an Irvine grant in 1996, it has attracted funding from other major foundations such as the Pew Charitable Trusts, the John Randolph and Dora Haynes Foundation and the Lilly Endowment, as well as public institutions such as the Calif. Council for the Humanities. (12/4/00 report, p.2; 7/00 report, p.1)
- USC/CRCC: CRCC partners with many faith-based civic engagement organizations:
  - a) It has helped convene, since 1999, an interfaith group of clergy and religious leaders that have formed an organization called Faith Communities for Families and Children (FCFC). It includes the Roman Catholic archdiocese, mainline and Pentecostal and AME denominations, Islamic and Jewish participants. (12/4/00 report, p.7)
  - b) CRCC partners with Los Angeles Metropolitan Churches, conducting interviews related to LAM's "One Church One School" project. (12/4/00 report, p.8)
  - c) CRCC partners with Churches United for Economic Development. Two Center staff serve on CUED's board. (12/4/00 report, p.9,11)
  - d) CRCC worked in 2000 with SANA (Salvadoran Association of Los Angeles), a "hometown association" of Salvadoran leaders from several churches -- Catholic, Presbyterian, Episcopal. The Center documented SANA's public events and facilitated press relations on August 6, 2000, when SANA presented a statue of El Salvador's patron saint and the City declared the day "El Salvador Day" in Los Angeles. (12/4/00 report, p.10)

***New knowledge relevant to FBCE practitioners is produced***

- California Council of Churches: In partnership with University of Southern California and University of San Francisco, completed a “California Religious Community Capacity Study” analyzing the capacity of California’s faith-based organizations to provide support for low-income women in the wake of welfare reform legislation. A 22-page final report, 93-page technical report, a website on “Faith Communities and Welfare Reform,” and a 20-minute video showcasing faith-based service projects in childcare, mentoring, job training and economic development. The study identified a set of conditions by which congregations can expand their service delivery capacity, which was used by the state Department of Economic Development as it developed its RFP for \$5 million earmarked for faith-based welfare-to-work services. (10/00 report, pp.1-3) The study’s research director at USC, John Orr, was invited to speak about findings to the directors of regional Catholic Charities, and to administrators in the California Department of Social Services. (USC 12/4/00 report, p.6)
- Fuller Seminary: Its conference on “The Church After Welfare Reform” in April 1999 anticipated findings of the CCC study, that few church (or community) members are focusing on “welfare reform.” Rather, the pressing issues are framed as job creation, placement, mentoring and related services. (7/99 report, p.3)
- OTC: A training curriculum called “Biblical Foundations for Community Organizing” was produced by Dr. Robert C. Linthicum for OTC’s California Project. Interest in the Project’s theological work led IAF to contract with Linthicum to help train IAF leaders and organizers throughout northern California, Oregon and Washington. PICO organizers have enrolled in Project-sponsored workshops. And LAM is in conversation with Linthicum about doing theological training in their network. (3/99 report, p.3, 3/98 report attachment, Craig McGarvey comment in 1/01).
- USC/CRCC: The Center for Religion and Civic Culture has conducted applied research partnership projects in more than 15 areas, including religion and health services in Los Angeles County, the role of religion for new immigrants, civic engagement strategies of at least four different FBCE structures in different parts of the state, and Los Angeles black church history. Many findings and publications are available through the Center’s website, and Center staff are regularly contacted by media in California and internationally to help interpret religion and civic culture for their audiences. (7/00 report)

**Individual**

***More individuals go through leadership/citizenship training***

- CEEP: 25 parish program directors in the Archdiocese of Los Angeles participated in a “Critical Faith, Critical Action” training, Spring 2000, led by CEEP. (7/00 report, p.9)

- FAITHS: 70 people from 18 congregations participated in a “Demystifying Economics” training series in fall 1998 in San Carlos, a joint effort of FAITHS, CEEP and Peninsula Community Foundation. (7/99 report, p.3)
- FAITHS: Representatives from 25 congregations, and Bank of America’s Community Lending Program, attended a workshop on Capital Access in June 2000. (7/00 report, p.2)
- Fuller Seminary: 152 people, from 61 different churches and agencies throughout southern California, attended a conference in April 1999 on “The Church After Welfare Reform.” (7/99 report, p.1)
- IAF: 400 people, from over 70 member institutions across Los Angeles, attended a metropolitan core team training session on February 19, 2000. (6/00 report, p.2)
- IAF: In Vallejo, Winters and Isleton, approximately 80 persons participated in Sacramento Valley Organizing Communities’ Active Citizenship Campaign weekly leadership training series in spring 2000. (6/00 report, p.3)
- IAF: 90 religious leaders attended a retreat in March 1997 as part of IAF’s “Reorganizing Mediating Institutions Strategy.” (6/97 report, p.4)
- LAM: 65 people attended national RCNO training in “fundamentals of community organizing,” spring 1999. (3/99 report) (Their goal had been 32 participants; they doubled that.) In March 1998, 50 LAM leaders attended “national faith-based community organization training.” (3/98 report)
- OTC: More than 30 pastors and lay leaders participated in a Los Angeles workshop in 1998 aimed at recruiting evangelical and pentecostal churches to congregation-based community organizations. Participants included Church of Christ, Four Square Gospel, Assemblies of God, Presbyterian, Nazarene and Baptist church leaders. (3/99 report, p.3)
- Proyecto Pastoral: 60 women, many of them immigrants, participated in a series of workshops in 1999 on the Violence Against Women Act (VAWA). As a result, many immigrant women applied to legalize their status on their own and others joined support groups. (12/99 report, p.1)
- Proyecto Pastoral: A series of six workshops on women’s leadership in health, in follow-up to a “Mujeres Unidas” conference in April 1999, drew at least 40 women to each workshop. (12/99 report, p.1)

***More individuals participate in civic affairs***

- FAITHS: Representatives of 154 faith- and community-based organizations participated in a convening called “The Issue Is Justice,” held in Oakland in November 1999. (7/00 report, p.2)
- FAITHS: 276 religious and community leaders participated in a pre-election forum to deal with race relations issues in the fall of 1996. (6/97 report, p.2)
- IAF: 500 community leaders from across Los Angeles met in assembly on June 27, 1999 to commit their time, energy and resources to formation of a regional faith-based civic engagement organization for the metropolitan Los Angeles region. (6/00 report, p.1)
- IAF: Over 240 persons participated in public meetings on “Immigration Education in the City of Sacramento,” held in the first half of 2000 in St. Anne’s Catholic Church in Sacramento, organized by SVOOC and several collaborating institutions. (6/00 report, p.3)
- IAF: 420 leaders from 27 churches in Sacramento, Solano and Yolo Counties met on May 20, 2000 in Vacaville to negotiate with state and local officials on issues including affordable housing, child care, job training, and INS problems. (6/00 report, p.4)
- IAF: 3,000 people connected with Bay Area Organizing Committee voted in the November 1996 elections. (6/97 report, p.1)
- IAF: 600 immigrants involved in Sacramento Valley Organizing Committee achieved citizenship in the year ended June 1997. (6/97 report, p.1)
- IAF: 20,000 immigrants applied for citizenship in Los Angeles County through the Active Citizenship Campaign (ACC) of the four Los Angeles IAF organizations. (6/97 report, p.2)
- IAF: 2,533 IAF volunteers, including 1,474 ACC graduates, contacted 90,772 voters in Los Angeles County prior to the November 1996 elections. (6/97 report, p.2)
- PICO: over 3,000 members of PICO organizations met in Sacramento with legislators from throughout California on May 2, 2000, as part of PICO’s statewide campaign for improved health care access. (10/00 report, p.4)
- Proyecto Pastoral: Over 150 residents of Boyle Heights neighborhood participated in a press conference and demonstration on October 10, 2000 to advocate greater safety measures following the killing of a 10-year-old girl on Clarence Street. Residents formed a human chain to block off the street, telling city officials that if speed bumps were not installed, the community would close the street with a human barrier. The mayor’s office subsequently committed to install speed bumps. Manuel Valencia, a spokesman for Los Angeles Mayor Richard Riordan, was quoted in the *Los Angeles Times* on October 14 as saying, “We are moved by the strength of the Boyle Heights community. You have made your voices heard, and they rang out loud and clear. The city will install speed bumps by Friday, October 20.” (12/00 report, p.2, 8)

- Proyecto Pastoral: 61 new voters were registered by leaders of Comunidad En Movimiento (CEM, Proyecto Pastoral's FBCE organization) before the November 2000 election. (12/00 report, p.2)
- Proyecto Pastoral: 500 community residents have participated in activities of the Immigration Reform Coalition in 2000. Residents attended two press conferences, one involving Congressional leaders and the other at the Governor's office, and a 38<sup>th</sup> Congressional district immigration forum in August and September 2000. One woman leader of CEM testified at the forum on how the 1986 IRCA benefited her and her children. (12/00 report, p.2,3)
- Proyecto Pastoral: 35 immigrants participating in Proyecto's citizenship classes became naturalized in the second half of 1999. (12/99 report, p.2)
- Proyecto Pastoral: Members of CEM and Dolores Mission's base communities run monthly meetings with all the department heads of the Los Angeles Housing Authority to discuss their issues. (12/99 report, p.2)

## LEARNINGS FROM THE FIELD

The strategic review included site visits to most grantee organizations in the portfolio; interviews with numerous practitioners, analysts and funders of faith-based civic activity both in California and around the U.S.; and a review of literature in the field of religion and civic culture. Persons contacted for the strategic review are listed in Appendix B.

We sought people's views on key trends, challenges and opportunities in this arena. Where appropriate we also gathered people's opinions on practices and strategies of the Irvine Organized Religion portfolio. Findings include the following:

### Findings Regarding Irvine's Practices

- **Irvine's support for civic engagement is valued and respected highly** by the people we interviewed. Even people whose own work is not directly about facilitating greater civic participation commend this. California's rapid rates of immigration have inspired a number of resource institutions to support naturalization activities. Irvine, however, is seen as visionary and courageous for reaching beyond naturalization to support innovation in efforts to draw new (and otherwise marginalized) citizens into meaningful, ongoing civic participation.
- **Irvine's strategy to work through faith-based institutions to strengthen civic engagement of marginalized peoples is seen as wise.** We have found broad support for key elements of Irvine's logic model: that faith-based institutions are where the people are, including new arrivals, poor people and people of color who often are most alienated and excluded from civic participation; that faith-based institutions are sites where values underpinning civic engagement, including stewardship of the common good and dignity of all peoples, are affirmed and critically examined; and that faith-based institutions offer a variety of ways in which people can become active in community and public affairs. Faith-based institutions are rich in social capital (mutual aid networks, trust, norms of reciprocity and engagement). While aspects of their culture can be problematic (e.g. tendencies toward charity rather than justice, and private enclaves rather than public participation), they offer substantial strengths as partners for community-building and civic renewal. In short, our contacts agree that faith-based institutions are important potential allies for Irvine's goal of strengthening pluralist democracy in California.
- **We found broad support for the strategies of supporting congregational civic engagement work and supporting networks of such institutions, and more qualified support for supporting partnerships between community practitioners and applied researchers.** Promoting civic engagement through faith-based institutions is widely applauded, as we noted above. Regarding the networking strategy, we observe that the Foundation is supporting several models. These include (a) the major religious-institution-based community organizing networks (Industrial Areas Foundation, Pacific Institute for Community Organization, and, to a much smaller degree, probably in scale with this network's presence in California, Gamaliel Foundation); (b) emerging network forms including FAITHS in the Bay

Area and Santa Barbara County, Los Angeles Metropolitan Churches, Interfaith Coalition for Immigrant Rights, and the Central Valley Partnership; (c) convening across networks, through the conference hosted by the USC Center.

We heard appreciation for the emphasis on continuous learning. However, the practitioners we spoke with tended to see the researcher/practitioner partnerships as secondary to, and complementary with, their core civic engagement work. We heard some concern that learning and documentation activities not require too much time of leaders and staff. We expect that the Foundation will need to continue to exercise care and skill in brokering and structuring these partnerships.

So far, we have heard only praise about the specific researchers involved in these partnerships, especially the USC center, the Aguirre Group, and PICO's Rutgers-based research partners. We heard more comments about the difficulties in partnerships between researchers, and between practitioners, than in the researcher-practitioner relationships!

- We found support for several specific aspects of the Foundation's practice in this portfolio. These include:
  - **willingness to provide long-term support.** By providing support for three, five or more years to organizations that demonstrate competence and productivity, Irvine nurtures stability, capacity growth and further innovations.
  - **respectfulness, instead of arrogance, toward partners.** Foundation staff are praised for their willingness to learn from their community partners, and for trusting that practitioners can determine for themselves what their priorities and strategies should be. The Foundation could do still more listening and learning out in the field, however; its partners would welcome that.
  - **perceptiveness and skilled interpretation of trends and practices in this field.** Foundation staff (especially Craig McGarvey), and to some degree also the researchers at the USC center, are recognized as astute observers and interpreters of the faith-based civic engagement field. Interviewees expressed respect and appreciation for the Foundation's skill at communicating the importance and difficulties in this work to others in the broader community. The Foundation may want to think about how to continue broadening this expertise among more staff members beyond Craig.

Because of its deep expertise in the Central Valley, in particular, **the Irvine Foundation is strategically positioned to influence other funders and policy-makers** as this rapidly growing and politically unpredictable region of California assumes more importance.

- **Irvine could do more to share lessons and knowledge among its partners.** People we interviewed recognize the substantial expertise being accumulated by Irvine staff in this arena. The Foundation could be even more active in sharing information about the various strategies and models of civic strengthening it is supporting, both faith-based and secular. This would both stimulate further development of partners' theories of change, and raise partners' awareness of prospective allies and collaborators.
- **Faith-based networks are in transition, and Irvine is providing important support to that transition.** Many once-dominant forms of faith-based institutional networks are in decline, especially the councils of churches and interfaith councils formed 30 to 60 years ago. Many of the mainline Protestant denominations have lost membership and vitality as well. One person

we interviewed spoke of how, over the last 30 years, talented religious leadership has increasingly chosen to work at the pastorate level rather than taking on denominational or interfaith structural roles.

New forms of partnership are emerging. We are hearing that cooperation among congregations, and institutional networks, is increasingly project- and task-oriented, toward specific outcome objectives; and localized, as neighboring congregations form nonprofit development or service affiliates or participate in regional civic federations. Habitat for Humanity is one of the most prominent examples of the new, hands-on, tangible-product-focused network form. The religious-institution-based community organizations are another form that has grown increasingly prominent as traditional denominational and ecumenical structures have stagnated.

Another form of interreligious cooperation involves collaboration among different forms of faith institutions, and between faith-based and other mediating civil structures. Collaboration around immigrant rights or community development, for example, may include action groups within congregations, denominational task forces or offices, and religious orders or funding sources. And collaboration with labor organizations, environmental groups, women's networks, legal aid organizations, and other issue- or constituency-based groups is seen as increasingly important by several of the people we have interviewed. Through FAITHS, the Council of Churches, Central Valley Partnership and the congregation-based organizing networks, Irvine has been providing space for new cooperative forms to emerge and for old networks to re-invent themselves. Indeed, some relationships likely would not have been made, across gaps of geographical distance or institutional type (such as some of the heterogeneous partnerships in the Central Valley and within the FAITHS network), if the Irvine-supported umbrella not helped bring parties to the table.

The Foundation may soon want to sponsor more critical examination of the strengths and challenges inherent in the various structural forms, to generate lessons about what different forms are capable of, what contexts are most conducive to which forms, key success factors across forms, and other strategic insights.

- **Proven models for increasing civic engagement of segments of the target population have been demonstrated in this portfolio.** The evaluation report on the Central Valley Partnership for Citizenship, a remarkably thorough and thoughtful document, especially highlights the effectiveness of the experiential citizenship development practices of the Industrial Areas Foundation affiliate, Sacramento Valley Organizing Community. SVOC is proficient at helping immigrants gain confidence and skills at analytical thinking, self-expression in multiple forms, and public relationship-building. It offers many modalities for civic engagement and a well-articulated “ladder” for progressively more demanding and responsible civic leadership roles as people grow in capacity and commitment. Judging from our interviews with representatives of other portfolio grantees, and review of publications from the Center for Religion and Civic Culture, the other organizing networks and alternative models such as El Colegio and Fresno Leadership Foundation supported by this portfolio also offer distinctive strengths in achieving the portfolio's central goal. Irvine has found several working examples of faith-based organizations successful at building people's (a) self-esteem and confidence to participate in community affairs; (b) skills at identifying and analyzing issues, generating solution pathways and strategies, working with other people and expressing themselves publicly; (c) knowledge of policy-making processes and how they can participate, of local power structures,

of how to identify and work with potential allies and adversaries of their own values and the implications of all this for civic participation; and (d) relationships with neighbors, friends, fellow church and organization members and people from other institutions and constituencies.

- **The portfolio still lacks relationships and knowledge for increasing civic engagement within Hindu, Muslim, Buddhist and theologically conservative Christian faith communities.** These populations are rapidly growing – for example, the 2000 Social Capital Benchmark Survey in Silicon Valley found that 10% of the population identified as Hindu, Muslim, Buddhist, and “other”, with 14% identifying as “other Christian” (neither Catholic nor Protestant). But the models for civic engagement described in the previous bullet have had little or no penetration into these groups.

## **Contextual Challenges, and Insights from Elsewhere**

- **The Central Valley offers important contextual challenges.** One of these is the disparities in power between established landowners and their allies, and recent immigrants and farmworkers and their allies. One informant told us that the Valley’s economy and civic culture rest on the three pillars of “cheap labor, cheap dirt, and cheap water;” and anyone who enters public life daring to question these pillars can expect severe retribution from established power-holders.
- **The Catholic Church in the Valley wrestles with these disparities internally as well as externally.** We heard that this is a diocese with money troubles, and while the bishop sympathizes with farmworkers and other poor members, the hierarchy is afraid to alienate the relatively few affluent parishioners. An additional barrier, we heard, is that while there is substantial lay interest in active citizenship education, few parish priests are supportive. Indeed, some priests, including some born in Spain or Ireland (we were surprised to hear that these are still supplying priests to California!), still show the centuries-old imperialist/racist prejudice against brown-skinned people of indigenous heritage. Signs of hope: the diocese recently established an official sponsorship of El Colegio Popular, after years of informal cooperation; and the diocese hired first Rolland Smith, a former IAF organizer, and then Ernie Velasquez, a longtime Valley Chicano militant who had formerly resigned as county social services director in protest over welfare cutbacks, to direct Valley Catholic Charities. Signs of difficulty: the diocese has not committed any financial support to El Colegio, and it lost Smith who resigned in frustration over diocesan constraints.
- **Fostering civic engagement among Valley immigrants may require a two-pronged strategy, for older and younger generations.** Those over age 30 may be engaged through naturalization and ESL classes with an active citizenship component; but their children may not follow their example due to generational tensions with their elders – they are assimilating on their own terms and not looking to their elders as models. A separate youth organizing strategy, that may be multi-cultural since younger Latinos and Hmong generally have good English skills, may be more effective for fostering active citizenship among this age group.

- **El Colegio’s citizenship development work, while a vastly different model from the church-based organizing projects, is exciting and impressively rooted in the cultural context of their Latino immigrant/low-wage worker constituency.** The young staff hired by El Colegio with Irvine funding to expand their citizenship education work seem to have fine intuitive skills for community-building and empowerment in their cultural context.

Nonetheless, they are hungry for better curricula and strategies to strengthen the active citizenship dimension of their naturalization and ESL classes. Their current efforts are rather ad hoc and centered on “Catholic Lobby Day” at the state capitol. They could use something with a stronger theoretical base, more fully developed and better integrated with students’ personal experience and the rest of the naturalization/ESL curriculum. Connecting them with popular education theorists and tool-builders, as Irvine has recently begun to do, is an excellent response to their current situation.

El Colegio also could use conceptual and practical help on nurturing their volunteer tutors to become effective coaches of active citizenship. These volunteers get only limited training, supervision and support, and not surprisingly their performance is uneven – yet as the front-line implementors of El Colegio’s citizenship work, they play a crucial role.

- **Fresno Leadership Foundation is a fascinating example of religiously-inspired social entrepreneurship, community building and civic engagement, rooted in faith but not strongly tied to organized religion.** Indeed, the white male evangelical Christians at the core of this organization have stronger partnerships with government, foundation and nonprofit institutions than with their own congregations or denominations. FLF shows how faith can be a catalyst for action, for partnership, for new institutional forms. We were impressed by how they reach out to and draw from diverse theoretical traditions – values-based organizing from the IAF and PICO models, asset-based community development from John McKnight and Jody Kretzmann, appreciative inquiry from corporate organizational development, economic and services development from Christian Community Development Association and Public/Private Ventures, and Biblically-rooted efforts to promote stewardship without patriarchy. Their rapid expansion (from 1 to 36 staff in 4 years, with possible growth up to 100 envisioned in the next five years) probably reflects their evangelistic traditions, their corporate backgrounds, and their advanced managerial skills.

Their efforts, along with other partners in the Central Valley Partnership, to develop a new model for faith-based civic organizing in Fresno are intriguing to watch. We noticed they are drawing especially on consultation with various former IAF organizers – bright, committed, experienced folks keenly aware of the strengths of that tradition but also of the need to innovate beyond it. We look forward to seeing the new model they develop over the next few years.

- **PICO and IAF appear to possess some different strengths.** Fresno Leadership Foundation folks appear to be finding IAF training more rigorous and useful than PICO’s, and are relying heavily on former IAF staff to think through their own organizing strategies. But we picked up some indications that PICO, at least nationally, may be more flexible in working with diverse partners and alternative organizing strategies. For example, the Asset-Based Community Development network sends its people to PICO, not IAF, for basic organizer/leader training. And in Denver, PICO is adapting its organizing methods to engage residents of a low-income neighborhood where churches are not a strong local resource. PICO may be more receptive to innovation and variation at the congregational level than IAF.

- The McKnight Foundation’s experience confirms that **faith-based networks**, including some councils of churches, **can be highly effective in drawing people into community service**. Their “Congregations in Community” initiative has far exceeded its goal of mobilizing 7000 volunteers.

McKnight has also seen that **faith-based service volunteering can lead into civic education, which in turn leads into policy advocacy**. Their initiative focused on mobilizing service volunteers, but their faith-based partners saw that as inseparable from education and civic activism on community concerns, and the partners have steadily strengthened their mechanisms for drawing congregational members into engagement on all three fronts.

McKnight’s experience has led it to see the faith-based sector as a key player in public problem solving, alongside the business sector, civic organizations, service and advocacy organizations. The foundation regularly funds faith-based organizing and advocacy under different issue programs (such as affordable housing and children’s issues) in addition to its grantmaking explicitly focused on leveraging the civic power of congregations. “We have seen the power of faith-based advocacy: legislators seem to listen to the faith-based folks,” foundation staff told us.

- Regarding evaluation in their faith-based work, the McKnight Foundation has run into difficulty trying to work with grantee partners to create common definitions and indicators, and to gather data consistently. **They have concluded that specific measurement (of individuals’ involvement in volunteering and civic roles) is not that critical, and began looking more at developing the infrastructure for service and advocacy within congregations**. The foundation hopes that over time, coaching and assistance from the intermediaries and networks will become less important. [This signals to us that this foundation is still progressing along the spectrum from a focus on what individuals can do to a recognition of the power of networks and ongoing relationships. We are aware of increasing evidence that shows networks continue to add value so long as they offer peer learning, critical reflection, and mutual support and accountability.]
- Some of the research work out of the University of Pennsylvania’s Center for Research on Religion and Urban Civil Society (CRRUCS) looks promising. Although a significant portion of their research focuses on organized religion service delivery models, **they identify an important intersect between service delivery and civic engagement**. Religious institutions have the bodies (and souls) that can be mobilized by faith-based community organizers to effect systems change. One can find examples of how congregations both deliver specific services and pursue strategies for systemic change in Ram Cnaan’s *Keeping Faith in the City: How 401 Urban Religious Congregations Serve Their Neediest Neighbors*, *The Newer Deal: Social Work and Religion in Partnership*, and *Social and Community Involvement of Religious Congregations Housed in Historic Religious Properties*. Religious institutions are lifted up as community resources that can be more effectively engaged in community organizing strategies. It will be important for faith-based community organizers to pay special attention to institutions such as CRRUCS and the Center for Religion and Civic Culture that are providing a growing body of knowledge about how religious institutions are involved in their respective communities.
- **One critical barrier to program impact is the shortage of skilled faith-based organizers**. Seeking clues for surmounting this barrier, we interviewed the founder and director of

Minnesota's Organizing Apprenticeship Project. Themes from the interview included the following:

a) **For an organizer training program that “ecumenically” works with multiple organizing networks or organizations to succeed, it must have buy-in from those sites** – because that's where apprentices receive mentorship and practice the trade. Therefore, establishing and maintaining working relationships with those diverse apprentice placement sites is crucial. Those networks and organizations must see their self-interest served by the ecumenical training program.

b) In Minnesota, neither IAF nor PICO is active. But Gamaliel Foundation, another militant network in the Alinsky tradition, is, and **Gamaliel has found OAP to be an extremely valuable ally**. The Minnesota Gamaliel affiliates have hired primarily OAP graduates since OAP began, we were told; and this year the Gamaliel group is even footing the costs for an additional apprentice to work with them and participate in the OAP training network.

c) The OAP director is extremely skilled and sensitive to the nuances of mentoring and developing young and new organizers. Should Irvine wish to explore this subject further, an in-depth visit with OAP leaders would be highly useful. OAP also is skillful at developing new organizers of color. In 90%-white Minnesota, OAP apprentices are primarily people of color.

d) **Interest in organizing as taught by OAP is strong and growing**. OAP typically places eight apprentices per year; this year they received over 40 applications, most of very high quality. With enlarged training and mentoring mechanisms, prospects are good for rapidly expanding the pool of organizers.

e) **Expanding the pool of organizers must be pursued in an integrated way that enlarges the number of post-apprenticeship work opportunities in pace with the expanding number of apprentices**. Achieving this coordinated growth among the organizing groups in Minnesota has been a major barrier to expansion of OAP to date.

- **Faith-based community engagement organizations struggle with obstacles to learning and to continuous improvement familiar in the nonprofit sector**. If these organizations had more skilled staff; sharper articulation of their goals, assumptions and outcomes; better information systems for tracking participants' experience, policy developments and other relevant data; and more opportunity for systematic reflection on their information and experience, then their learning, accountability and performance would improve.
- **Major challenges to robust civic participation continue in contemporary California**. These include (a) language barriers – both for immigrant participation in mainstream English affairs and for multi-ethnic collaboration; (b) widespread mistrust of public institutions; (c) few vehicles for encouraging broad civic participation (e.g. public schools, libraries and government are largely inactive on teaching active citizenship, especially for adults); and (d) major economic and logistical constraints on participation due to low-wage jobs, high housing costs, frayed and deteriorating health and child care services, and poor transportation systems (it's hard enough to keep a family together, let alone participate in community life); and (e) growing population and demographic complexity as California's economic, cultural and environmental assets continue to fuel high rates of immigration.

## **THEORY OF CHANGE (LOGIC MODEL)**

### **for the James Irvine Foundation's Organized Religion Portfolio**

This chapter describes the new “logic model” or conceptual framework for the James Irvine Foundation's Organized Religion portfolio, part of its Civic Culture program area. It describes the portfolio's “theory of change”: what this portfolio expects to accomplish, and the thinking behind those expectations – how and why it expects these changes to be achieved. The model is also depicted in the “Theory of Change” diagram (Diagram 1).

This logic model was developed in a year-long strategic review process involving Foundation program and evaluation staff, portfolio grantees and others knowledgeable about faith-based civic engagement. The strategic review analyzed the experience of the portfolio's first five years (1996-2001), and conducted interviews and searched the literature nationally on faith-based civic engagement. David Scheie and T. Williams of Rainbow Research led the strategic review.

### **Problem Statement**

The increasing complexity of California's cultural and demographic composition, fueled by high rates of immigration, threatens the civic fabric of the state. California in 2001 displays extreme and increasing disparities of wealth, opportunity and civic engagement between different segments of California's population, with new and low-income residents at the margins of civic life. Much research shows deep and increasing distrust of public institutions and public leadership. Yet how can public problems be solved without trust and participation?

The faith-based sector offers hope for renewing California's civic culture, especially through engagement of new and low-income residents. Organized religion offers a critical values base for civic engagement, consistent with the Irvine Foundation's core values: inclusivity, tolerance for difference, respect for individual human dignity, love for neighbor, and appreciation for inquiry and learning. Congregations are where the people (including newcomers and poor people) are, and they offer important places of public space where voluntary associations form and people exercise skills of community participation.

### **Long-term Vision**

The long-term vision of the Organized Religion portfolio is to help establish a robust civic culture in California, inclusive of the state's full ethnic diversity. Such a civic culture will be capable of solving the state's significant public problems – economic, environmental, social – and will be the best guarantee that future Californians will enjoy an excellent quality of life. In this vision:

- California communities will be rich in “bonding” and “bridging” democratic social capital, as defined by Robert Putnam and Richard Wood: dense networks of relationships (horizontal as well as vertical), high levels of trust, and norms of engagement and reciprocity -- across diverse segments of the community (“bridging”) as well as among people of similar identities (“bonding”).
- Faith-based, networked structures that actively engage new and low-income Californians in civic life will exist in every California community. Through these structures, diverse residents will participate in identifying issues important to the quality of life in their communities, and making and implementing plans together to achieve identified quality of life goals.
- Elected and appointed public officials will be representative of the state’s cultural diversity.

## Some Definitions

***Ally:*** An individual or organization who works on behalf of others’ interests. Includes “partners” (defined below) who act supportively through coordinated effort, but also those who work independently toward goals shared by others, without consultation or coordination.

***Faith-Based Civic Engagement structure (FBCE):*** An entity comprised of multiple institutions, primarily faith-based organizations though not necessarily exclusively so, with a mission to increase the civic engagement of new and low-income Californians. Might call itself a “coalition,” a “federation,” an “organizing project,” a “council,” or a “community.”

***Goal:*** A desired outcome of this portfolio, both short-term and long-term. “To achieve the goals of this portfolio” means to achieve the desired outcomes in the timeframe specified.

***Knowledge-Building Institution (KBI):*** An institution with a mission to develop and share new knowledge. Includes institutions of higher education, can also include independent applied research organizations committed to sharing knowledge in the public domain. For purposes of this portfolio, KBIs must also be committed to working in respectful partnership with faith-based organizations and faith-based civic engagement structures.

***Organizer:*** In this document, “organizer” refers to paid staff of FBCEs with central responsibility for developing and supporting the volunteer leadership of civic organizations. We recognize that both paid staff and volunteer participants engage in “organizing,” by which we mean bringing people and institutions together to get something done that advances their interests, builds common ground and stronger ties among them, solves public problems and develops their civic capacities. But in this logic model we use the distinction common among many faith-based community organizing groups that call paid staff doing this work “organizers” and the voluntary participants “leaders.” Leaders speak publicly for the organization and exercise formal governance power in the organization; organizers find, develop and provide leaders with the support that will enable the organization to be powerful and effective.

**Partner.** Refers to a collaborating organization or individual. “Program partners” and “portfolio partners” include the Irvine Foundation and those organizations and individuals that have worked with it in its various programs or portfolios.

## **Portfolio Resources**

Resources include the Irvine Foundation’s own knowledge, relationships and credibility earned through the portfolio’s conduct to date; and its grantmaking funds.

Other program partners, ideas, and opportunities for synergy may be available to this portfolio from the Foundation’s other program areas such as Education, Community Foundations and Sustainable Communities. By leveraging knowledge and coordinating efforts with other program areas, increased progress toward goals may be possible.

Resources for increased communications include the accumulating body of knowledge (stories, lessons, documentation), spokespersons, and relationships with media representatives carried by Irvine and its partners.

Irvine’s current faith-based and knowledge-building partners are talented, committed, and have momentum that the next phase can build on. They include substantial diversity in region, institutional type, and cultural identity (except that Hindus, Moslems, Buddhists and evangelical Christians are under-represented).

Knowledge and advisers from other places – funders such as McKnight Foundation and Pew Charitable Trusts, practitioners such as the Asset-Based Community Development network and Organizing Apprenticeship Project, and knowledge-builders such as University of Pennsylvania and Rich Wood at the University of New Mexico – can inform FBCE efforts in California.

## **Strategies**

### ***Strategies for faith-based civic engagement structures (FBCEs)***

One key bottleneck slowing expansion of current good models is a shortage of skilled organizers to staff FBCEs. Conducting research and organizing to develop a vehicle for expanding the pool of organizers is a high first priority. Increasing the skills of current organizers is also desirable but not sufficient for achieving the goals of this portfolio.

Current effective FBCE partners should be supported to continue their work with current participants, and to expand in present locations by including more faith-based organizations and more individual participants. Continued work should not be taken for granted but deserves long-term support.

Continued support of current effective FBCE partners should be based on an expectation that FBCEs will become stronger not only through including more participants but also through continuous learning and improvement of strategies and practices.

Current FBCE structures should be supported to initiate new FBCE structures in communities currently without such structures. Successful, active FBCEs are best equipped to initiate structures in new communities – especially if they can be flexibly responsive to local circumstances.

Activity by FBCEs will result in both individual outcomes (among individuals participating in FBCEs) and institutional outcomes (among participating FBCE structures).

Appropriate partners and strategies should be found and supported for increasing civic engagement in other faith communities currently scarce in this portfolio: Hindu, Moslem, Buddhist, and evangelical Christian communities. This begins with outreach and relationship-building in these communities, and with applied research (see C.5, below) to learn more about the challenges and opportunities here. Outreach and relationship-building should be conducted by Irvine staff at minimum, but ideally also by a range of FBCE practitioners and knowledge-building applied researchers.

### ***Strategies for knowledge building***

Knowledge-building work will support both the front-line civic engagement work of faith-based organizations and networks, and the public communications efforts of all portfolio partners.

Faith-based civic engagement organizations will learn more, achieve more, and increase their accountability to key stakeholders as they strengthen internal theorizing about their change strategies, monitor relevant indicators more rigorously, and reflect more regularly and analytically on data to guide planning. This includes sharper conceptualization, better information-gathering systems, and better reflection practices.

Caution must be exercised so that oral and intuitive strengths in the current organizational culture are not displaced. Initial planning should seek to understand and take seriously the practical reasons why FBCE partners have been slow to expand their data-based documentation and decision-making systems.

Early innovations in planning, documentation and learning should be modest and flexible, to maximize creative discovery and minimize risks and burdens for participating practitioners.

Current efforts to develop and communicate new knowledge about faith-based civic engagement in northern and inland California are limited by a shortage of knowledge-building institutions on this topic in these regions. These regions deserve skilled applied research and relationship-building of the kind practiced now by Center for Religion and Civic Culture (CRCC) in Los Angeles.

Barriers to developing larger institutional commitment to applied research in faith-based civic engagement are substantial at higher education institutions. Nonetheless, establishment of another

center comparable to CRCC would be a valuable achievement. It is a goal worthy of substantial investment of effort and resources.

Pros and cons of two possible paths should be carefully scrutinized: (a) one or two major academic centers, a la CRCC; or (b) many smaller, decentralized efforts networked together somehow. Potential host institutions and lead researchers should be scouted and cultivated.

Background research to inform strategies to expand knowledge-building institutional involvement in the field of faith-based civic engagement should include: (a) learning from the experience of organizer Mike Eichler who has been trying to build an institutional base at UC-San Diego; (b) assessing prospects of institutional commitment at University of San Francisco where some CRCC alumni are now working; (c) assessing prospects at other faith-based universities in Irvine's education portfolio; (d) assessing prospects at California State Universities; (e) assessing prospects at community colleges (which may especially skilled at designing and delivering custom training curricula for organizing, active citizenship and internal learning/management systems for FBCEs).

Current partnerships between knowledge-builders and faith-based civic engagement practitioners should continue to document, analyze, and articulate learnings on FBCE for broader audiences. These partnerships should produce not only more *quantity* but also higher *quality* of new knowledge: findings that are more relevant and useful to FBCE practitioners, especially.

One research priority should be to learn more about how to mobilize faith-based civic engagement in other faith communities (Hindu, Moslem, Buddhist, and evangelical Christian) to inform pilot projects in those groups.

### ***Strategies for public communications***

More public communications will improve the environment for faith-based civic engagement efforts, by increasing awareness and understanding and providing information by which others can adapt or emulate current good practices.

All partners in this portfolio – faith-based organizations, knowledge-building institutions, and the Irvine Foundation – can do more to deploy communications strategies in pursuit of the portfolio's goals.

Basic steps to improve public communications include (a) developing strategic communications plans, (b) implementing those plans and (c) expanding communications capacities.

Communications efforts should target several audiences. These might include mainstream media (e.g. major newspapers, television and radio stations) but also more narrowly focused audiences (e.g. specific faith or cultural groups, clergy, prospective organizers). Communications planning should rigorously identify top-priority target audiences.

Communications planning should consider many possible communications channels. These might include face-to-face, broadcast and narrowcast media, and Internet channels.

## **Short-term Outcomes**

### ***Short-term outcomes, individuals***

As individuals participate in faith-based civic engagement structures, they develop attitudes, knowledge, skills and relationships that enable them to participate more effectively in civic life.

They will feel more a part of their community; have more knowledge about civic processes and how to participate, and be more aware of the cultural and demographic diversity in their community and the state.

They will possess more skills at leadership, organizing, research and communications – i.e. at the many skills involved in civic engagement.

They will have more relationships which include attention to civic concerns; and they will show more confidence and a sense of entitlement to participate in civic affairs, as their sense of belonging and knowledge increases, and their web of civic relationships grows.

### ***Short-term outcomes, faith-based civic engagement structures***

As new mechanisms for recruiting, developing and retaining organizers begin operating, the pool of skilled organizers for FBCEs will expand.

As barriers are analyzed and strategies formed for better internal learning and databased decision-making, participating FBCEs will adopt more-rigorous methods for refining their practice and learning through experience. These learning and management practices will be tailored to be relevant to FBCEs' distinctive civic engagement mission.

FBCEs will grow bigger (more individual and institutional members) and more numerous (present in more locations) as organizers increase, learning & information systems improve, knowledge of effective practices increases, and their environment is “softened” through better public communications.

As a result of targeted research and relationship-building efforts, at least a few FBCEs will begin or expand operations in Hindu, Moslem, Buddhist, and/or evangelical Christian constituencies.

### ***Short-term outcomes, knowledge-building institutions***

Knowledge-building outcomes will grow out of activities by faith-based civic engagement groups, Irvine, current knowledge-building partners of Irvine, and as a result of communications activities.

As Irvine and its partners continue to circulate, form relationships and sponsor more applied research projects, nodes of knowledge-building activity involving small groups and loose networks

of researchers will form at one or more applied research institutions in the Bay Area and/or Central Valley.

As University of Southern California's Center for Religion and Civic Culture completes and initiates more projects, and earns increasing visibility on campus and in the community, it will attract a growing stream of applied researchers.

The number of applied researchers on faith-based civic engagement known to Irvine and to one another will increase as this becomes a more visible field and as Irvine and its partners continue to circulate, convene and broker relationships.

As participating knowledge building institutions grow in skill and experience, they will produce knowledge that is more relevant and useful to FBCE practitioners.

### ***Short-term outcomes, communities***

Communication about faith-based civic engagement – why it exists, what it's doing, what it's up against, what works, etc. – will change awareness and attitudes toward FBCE in the broader community. This includes communication from multiple standpoints including FBCE practitioners, applied researchers learning about FBCE, popular and specialized media, and by Irvine and other supporters of faith-based civic engagement.

As awareness and attitudes change, people and institutions in the broader community will support and participate more in FBCE structures and in allied knowledge-building efforts.

Communications efforts in this portfolio will be targeted so that the first community sectors that will display greater awareness, support and participation will be (a) other foundations and (b) government officials and agencies.

## **Long-term Outcomes**

### ***Long-term outcomes, individuals***

As individuals continue to develop civic skills, knowledge, attitudes and relationships through long-term participation in FBCE organizations and networks, they will shift in participation style from more-passive (in received, silent roles) to more-active (more initiatory and creative vocal roles). They will take on progressively greater leadership responsibilities within FBCE structures, and will increasingly draw in and support others to become more civically engaged. They will not only be more aware of diversity in their community but also understand the value of having civic relationships that bridge across the many dimensions of that diversity.

Over time, as FBCE structures grow in more faith communities and as FBCE structures mature so that they encompass or bridge across more diversity, the mix of civic participants will increasingly include people of diverse cultural, class, and faith identities.

### ***Long-term outcomes, FBCE structures***

As FBCE institutions add organizers, strengthen their learning and management practices, become bigger and more numerous, and as they increasingly emerge in diverse faith communities, they will become highly effective at citizenship and leadership development, i.e. at spotting, building and mobilizing individuals' civic capacities, especially among new and low-income Californians.

They will display increased effectiveness at identifying, analyzing and solving public issues. They will achieve more, and more substantial, policy changes and community changes.

They will maintain active relationships with a growing web of other FBCEs across California. For FBCEs in specific community organizing networks (such as PICO or IAF), this long-term outcome includes more and stronger relationships with FBCEs outside their own networks. These relationships include sharing information for mutual benefit and, increasingly, joint action on shared goals.

They will display more “bridging” social capital, with relationships and trust increasing across lines of difference (different institutions, cultural and demographic groups, etc.). This includes more relationships and trust with faith communities that may not be included in their own membership. It also includes stronger connections to individuals and institutions in the private (for-profit) sector as well as the nonprofit and public sectors.

Their leadership pools will be a healthy mix of newer and longer-term leaders.

Every three to five years, they will practice re-building. Mission, structure, membership and strategies will be reviewed and renewed so that these organizations do not ossify or rust but maintain dynamic vigor with deep, fresh local community roots.

Changes in the community – both those achieved directly by FBCE structures and those achieved by knowledge-building, communications and funding allies – will contribute to long-term outcomes in FBCE structures. As community norms and structures become better aligned with FBCE interests, this will help FBCEs attract and retain participants and resources and achieve further community outcomes.

### ***Long-term outcomes, knowledge-building institutions***

As the field of faith-based civic engagement becomes bigger and more prominent, and as more applied researchers earn distinctive reputations, administrators at one or more knowledge-building institutions besides USC will embrace this focus as part of their institutional identity and commit long-term institutional support to applied FBCE research.

As applied researchers and FBCEs complete a growing number of satisfying projects, and as findings and experiences are shared through various communications and dialogue channels, the network of knowledge-builders and faith-based civic practitioners will grow larger, denser, and stronger.

Output by participating KBIs will be of steadily higher quality: increasingly useful not only to FBCE practitioners but also to scholars, funders, policy-makers and other stakeholders in this portfolio.

The body of knowledge on faith-based civic engagement will become deep, wide, and widely used by FBCE practitioners, researchers and educators, funders and policy makers, and other interested individuals and institutions.

Long-term knowledge-building outcomes will be influenced by community changes as well as the direct efforts of knowledge-building institutions and their FBCE partners.

### ***Long-term outcomes, communities***

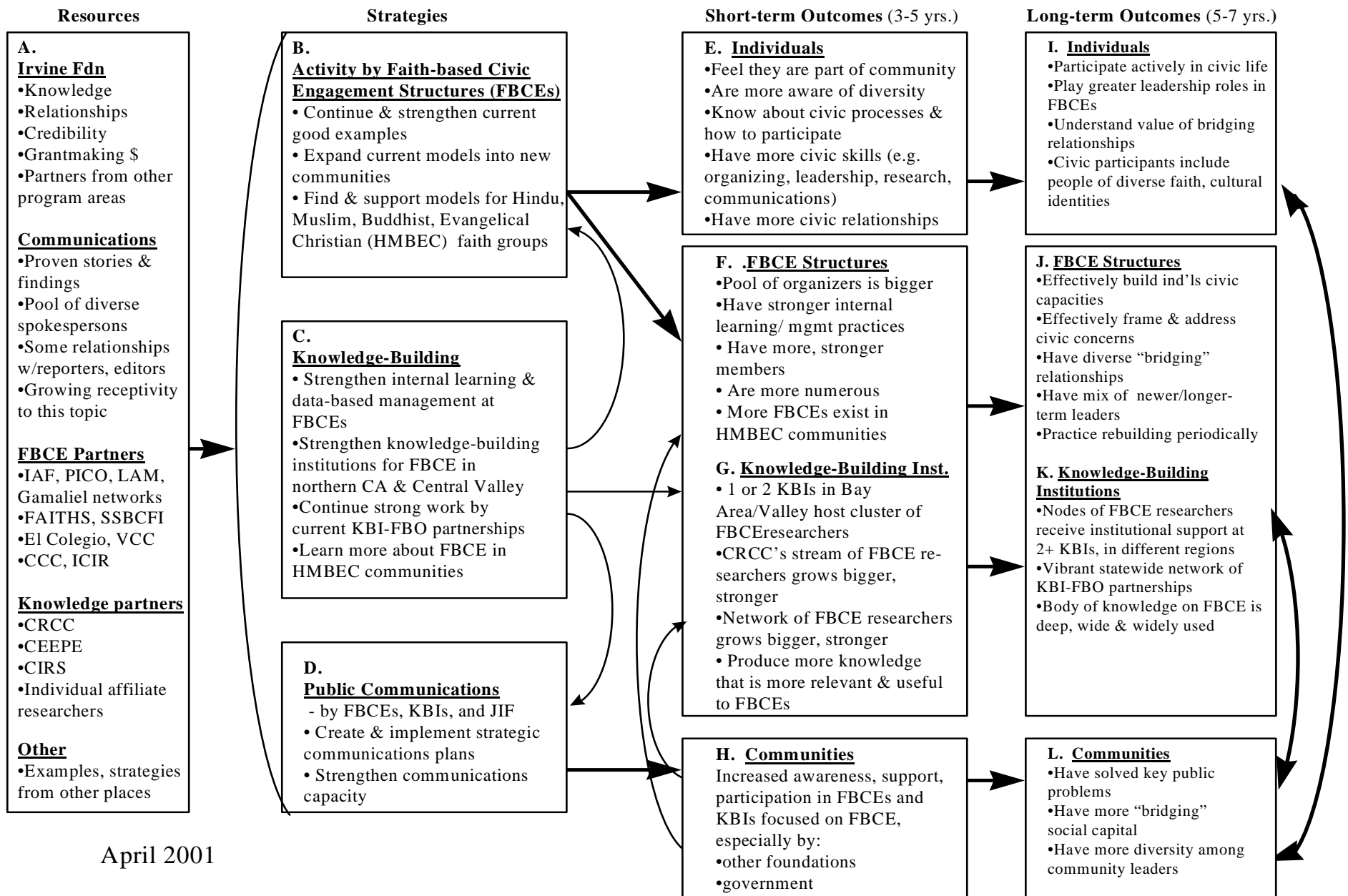
Communities will change as a result of the accomplishments of FBCE institutions, the individuals participating in or touched by FBCE structures, and by FBCE-focused knowledge-builders and communicators.

Key public problems in California communities will be solved (at least for a time, until community conditions evolve further). Public concerns – e.g. education, health care, environment, transportation, economics – will be addressed more effectively, thanks to the enlivening effect of robust faith-based civic engagement structures.

Communities will have more “bridging” social capital (as defined by Robert Putnam) which will provide cohesion and capacity to solve new public problems as they arise.

People in positions of leadership within California communities will be diverse, reflecting the cultural diversity resident in the communities.

**Diagram 1: Organized Religion Portfolio's Theory of Change, 2001 -**



## EVALUATION FRAMEWORK

### for the James Irvine Foundation's Organized Religion Portfolio

This chapter describes possible indicators of progress toward each of the outcomes included in the Organized Religion portfolio logic model. Indicators are used to answer the question, “How will we know if we’re making progress?”

For greatest usefulness as a planning and evaluation tool, indicators should specify their proposed populations, thresholds & targets, and timelines.<sup>1</sup>

- **Populations** define the groups of people, organizations or communities that stakeholders expect to be tracked for each indicator.
- **Thresholds & Targets** define the amount of change we hope to see in the indicator data:—a “threshold” is the minimum amount of progress we expect to see (“how good is good enough”) to confirm that our theory of change is accurate— a “target” is the desired level of progress that indicates highly successful accomplishment.
- **Timelines** specify when the thresholds and targets are expected to be achieved, in order to meet stakeholders’ expectations based on the assumptions in the theory of change.

Specifying populations, thresholds/targets and timelines makes indicators concrete and precise. Once they are specified, plans are in place to answer precisely the question, “Did we reach our goal?” These details allow the evaluation framework to become a practical management tool for monitoring, analyzing and learning from progress.

Adjusting any of these dimensions, of course, affects whether the goal is lofty or near. All of these dimensions should be defined carefully based on consideration of the resources and strategies available as well as on the assumptions about how and why change is expected to happen.

Indicators (and especially their specification of populations, thresholds/targets, and timelines) are most relevant and accurate when developed in consultation with key evaluation stakeholders – both the organizations doing the work, and the investors and other audiences wanting to learn about and from the work. We have drafted possible populations, thresholds, targets and timelines for many of the indicators in this framework. (Because specification of indicator details grows increasingly conjectural the farther into the future one projects, we have omitted detailed specifications for most indicators of long-term outcomes.) However, none of these specifications have been reviewed closely by a meaningful cross-section of portfolio partners, so they should be viewed as an early aid to evaluation planning, not as the final word. Many organizations may consider other indicators to be more meaningful in their specific context, for example; or the specifications of these indicators may be too easy or too difficult to achieve given a specific organization’s capacities.

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<sup>1</sup> Definitions based on Andrea Anderson and Anne Kubisch, 2000, “Introduction to the Theory of Change Approach to Program Planning and Evaluation.” New York: Aspen Institute Roundtable on Comprehensive Community Initiatives for Children and Families.

## **Lessons From a Retrospective Assessment and Field Scan**

As part of the Organized Religion strategic review project, we examined 36 progress reports from 13 portfolio grantees submitted in the early years of the portfolio, 1996-2000. (Portfolio accomplishments during those years are described in the document “Summary of Achievements, 1996-2000.”)

We also visited 11 grantee organizations across the state, interviewing 18 people; conducted two day-long meetings involving 19 people from nine grantee organizations; and reviewed numerous public documents produced by grantees. To draw on the wisdom of others in the field of organized religion and civic culture, we also held conversations with over 20 practitioners, researchers, journalists and funders, investigated over 10 internet web-sites, and scanned dozens of articles and books.

### ***Current reporting strengths***

Analyzing this information for insights on strengths and gaps in current grantee documentation and learning practices, we found that FBCE grantees do a particularly strong job reporting on policy and systems change accomplishments. We believe this is partly because these accomplishments are highly tangible, and also because this information is used routinely in the FBCEs’ internal evaluation and their reporting to key audiences including their own members and other public actors. They also reported extensively on the multi-sector “bridging” relationships they were developing with public agencies, nonprofit and public interest organizations, labor and corporate actors. We think this, too, is an area of strategic importance to them so they monitor it carefully to gauge progress, inform strategy refinement, and maintain accountability to their stakeholders.

Grantees also keep good records on the numbers of participants in their major public actions and their leadership training activities, and on the number and variety of institutional members they have. These are primary indicators of organizational power used in their communications and planning.

Grantees reported with sophistication and thoughtfulness on their efforts to build partnerships with knowledge building institutions and to improve their systems for developing more organizers. We think this is because these two topics have been of special interest to the Irvine Foundation.

### ***Current gaps***

One theme missing from grantee reports, and maybe from their internal monitoring systems, is comprehensive information on change at the individual level. Simple numerical indicators of individual participation are recorded, and many examples of individual change are known to staff and leaders in these organizations. But these stories are seldom written down and not often (if ever) reviewed and analyzed systematically. Information on what citizenship and leadership development techniques work for whom; how to spot talent, nurture it and avoid burning it out; and how to

adjust organizational systems to allow for healthy expansion and turnover of leadership is probably available intuitively to skilled staff in these organizations, but is rarely written down.

We also found little written information on the subtleties of strengthening the institutional membership base of FBCE structures and forming new FBCE organizations. This is probably a priority within the skillset of FBCE organizers, since it is at the very heart of the work. But little information has been shared with Irvine to date. We suspect this is a sensitive topic – information could be used by competitors or critics to damage these organizations. Groundrules for safety must be developed before information systems can go much further.

A third area where we found relatively little current information is on the use of new knowledge being produced. We found decent discussion in some reports on how grantees are learning from their own experience. But we found little evidence of feedback loops that can help knowledge-producing partners improve.

### ***Practitioner interests and worries regarding stronger evaluation and learning systems***

Community partners are eager to learn more and to report more effectively on their work and their accomplishments. They would like more access to the knowledge held by Irvine staff and their peers – mechanisms for sharing information and occasional joint reflection would be welcomed. Regional and statewide mentoring and peer learning mechanisms have been strengthened by the major organizing networks in the last 5 years, and participants have much appreciated this.

People are most worried that documentation and evaluation activities will “dumb down” the work by focusing on trivial indicators (the risk of “pedantry”), and that increased evaluation expectations and ill-chosen methods will displace their core program work. If we can find methods that build on the activities these groups already do, and that increase awareness and provide new insight into the core challenges they are concerned with, expanded evaluation will be welcomed. Practitioners are most interested in approaches that strengthen the “culture of conversation” rather than displace or devalue it.

### ***Building on strategic review findings***

The indicators offered in this framework draw on a variety of methods and sources, including surveys; dyad and group conversations; records held by faith-based or knowledge-building grantees or the Irvine Foundation; press clippings, internet list-serve records and web-site “hits;” and public records. We have tried to nominate methods and sources that are already familiar and accessible to portfolio partners.

Evaluation Focus	Indicators	Methods
<b>Short-term Outcomes, Individuals:</b>		
E.1. Feel they are part of community.	Agree that "I belong in this community."	Participants survey/1:1s/ group reflection.
E.2. Are more aware of diversity.	Have talked in last month with someone from a different background than their own.	"
E.3. Know about civic processes and how to participate.	Have contacted a public official in last year..	"
E.4. Have more civic skills (at leadership, organizing, research, communications).	Know how to do a 1-to-1.	"
E.5. Have more civic relationships.	Know 2 people that will attend meeting or make phone call on their request.	"
<b>Short-term Outcomes, Faith-Based Civic Engagement structures (FBCEs):</b>		
F.1. More skilled faith-based community organizers.	# of experienced organizers on FBCE staffs.	FBCE records.
F.2. More rigorous, relevant learning & mgmt. practices.	Amount of documentation collected and reviewed regularly.	FBCE records.
F.3. More members.	# of FBO members (holding definition consistent).	FBCE records.
F.4. More numerous.	# of individuals participating in major public actions.	FBCE records.
F.5. More established in Hindu, Muslim, Buddhist and evangelical Christian communities.	# of FBCEs in Irvine-supported networks.	FBCE network records.
	# of Irvine-supported FBCEs in these communities.	FBCE records.
<b>Short-term Outcomes, Knowledge-Building Institutions (KBIs):</b>		
G.1. KBIs in northern CA/Central Valley host nodes of FBCE researchers.	# of KBIs in these regions with 3 or more Irvine-linked applied researchers.	KBI records.
G.2. CRCC's stream of researchers grows bigger & stronger.	# of FBCE researchers affiliated with CRCC.	CRCC records.
	# of invitations to research extended to CRCC from FBCEs.	CRCC records.
G.3. FBCE researchers' network grows bigger, stronger.	# of California FBCE researchers known to Irvine.	Irvine records.
	# of researchers that can describe other researchers' projects.	Survey of researchers.
	# of active KBI/FBCE partnerships.	FBCE records.
G.4. More relevant, useful knowledge is produced.	# of requests by FBCE practitioners for KBI publications.	KBI records.
<b>Short-term Outcomes, California Communities:</b>		
H.1. More awareness & support for FBCE by foundations.	# of foundations funding Irvine Organized Religion grantees.	Grantee records.
H.2. More awareness & support for FBCE by govt.	# of public officials responding publicly to concerns voiced by FBCE structures.	FBCE records.

Evaluation Focus	Indicators	Methods
<p><b>Long-term Outcomes, Individuals:</b>                      Long-term FBCE participants...</p> <p>I.1. Participate actively in civic life.</p> <p>I.2. Play greater FBCE leadership roles.</p> <p>I.3. Understand value of bridging relationships</p> <p>I.4. Civic participants are of diverse faith, cultural identities.</p>	<p>Initiate civic action.</p> <p>Hold increasingly responsible positions in FBCE.</p> <p>Have relationships w/people of other backgrounds.</p> <p>Leaders' profile of FBCEs</p>	<p>Survey/1:1/ group reflection. FBCE records.</p> <p>Survey/1:1/ group reflection. FBCE records.</p>
<p><b>Long-term Outcomes, FBCE structures:</b></p> <p>J.1. FBCEs effectively build individuals' civic capacities.</p> <p>J.2. FBCEs effectively frame &amp; address civic concerns.</p> <p>J.3. FBCEs have diverse "bridging" relationships.</p> <p>J.4. FBCEs have mix of newer/longer-term leaders.</p> <p>J.5. FBCEs practice rebuilding periodically.</p>	<p>Testimony from participants &amp; observers.</p> <p>Higher naturalization &amp; voting rates.</p> <p>Testimony from across political, cultural, socioeconomic spectra.</p> <p>Joint actions w/other org's and sectors.</p> <p>Profile of FBCE leaders' tenure.</p> <p>"Rebuild" is on org'l agenda sometime in last 5 years.</p>	<p>Survey/1:1/ group reflection. Public records. Press clips, FBCE records. FBCE records.</p> <p>FBCE records.</p> <p>FBCE records.</p>
<p><b>Long-term Outcomes, KBIs:</b></p> <p>K.1. At least two KBIs, in two different regions, give institutional support to FBCE applied research.</p> <p>K.2. Vibrant statewide network of KBI-FBO partnerships.</p> <p>K.3. Body of knowledge on FBCE is deep, wide &amp; widely used.</p>	<p># of KBIs with policy commitment, and financial commitment of \$50k/yr., for FBCE research.</p> <p># postings in KBI-FBO list-serve.</p> <p># of titles # copies ordered annually Geographical distribution of users/purchasers.</p>	<p>KBI records.</p> <p>List-serve moderator records. KBI records.</p>
<p><b>Long-term Outcomes, Communities:</b></p> <p>L.1. Communities have "solved" key public problems.</p> <p>L.2. Communities have more "bridging" social capital.</p> <p>L.3. Communities' leadership is more culturally diverse.</p>	<p>Improved scores on quality of life indicators. Public &amp; private policy changes</p> <p>More cross-faith, cross-cultural, cross-sector collaboration.</p> <p>Profile of positional leadership in communities.</p>	<p>Public data. Press clips, grantee records.</p> <p>Press clips, grantee records Press clips, public records.</p>

## **ISSUES FOR CONSIDERATION, AND RECOMMENDATIONS**

### **Issues for Consideration: Program Implementation**

1. If it's not possible to do everything, which goals are most important?
2. What resources are required to implement this vision – and what are the strategies for attracting/retaining those resources?
  - a. Internally at Irvine
  - b. Externally – in philanthropy, in the faith-based sector, in the civic sector
3. What are the biggest risks in trying to implement this vision?
  - Who is most likely to object? (Which relationships are most likely to fray or break?)
  - What's the worst thing that might happen?

### **Issues for Consideration: Learning and Evaluation**

1. Implementing the evaluation framework:
  - a. How far, how fast, how much local choice by grantees?
  - b. Avoiding pedantry – using indicators that authentically express the core of the work, using methods that grantees would use anyway
  - c. How not to displace the current strengths of FBCE partners
  - d. What information is crucial to maintain accountability to JIF Board?
2. Re “strengthening the culture of learning:”
  - a. What do FBCEs want to learn about and get better at?
  - b. What kinds of information, what methods of gathering and using information are most appealing to them? -- methods and foci that strengthen the “culture of conversation”
3. Numbers and stories:
  - ◆ Using numbers to increase effectiveness and attract more support:
    - a. what numbers are most useful? Are these accessible (do-able)?
    - b. using numbers to spark new learning about our stories: methods for interpreting, reflecting upon numbers
  - ◆ Learning more powerfully from stories:
    - a. whose stories? What stories to collect? Who collects them? How do we assemble, refine and use them?
    - b. From Many Into One: Drawing together an organization's many stories (and many numbers) into its One Great Story, its central animating story.
    - c. Using stories to explain the numbers, and to focus the search for numbers.

## **Recommended Program Priorities in the Next Phase of the Organized Religion Portfolio**

1. **Continue the good work now underway by FBCEs and KBIs.**  
Focus especially on:
  - a. Developing more leaders and participants from the target constituency of new and low-income Californians
  - b. Achieving policy change and practical community improvements
  - c. Building relationships across lines of difference
  - d. Building durable, grounded, visionary organizations
  
2. **Boost the FBCE work through targeted expansion and capacity-building.**
  - a. Strengthen mechanisms to recruit and develop skilled organizers
  - b. FBCEs add staff and expand into new communities
  - c. Strengthen active citizenship curricula and learning strategies
  - d. Strengthen systems for gathering and using relevant data to inform decision-making
  - e. Strengthen inter-regional and inter-network relationships, including more joint activity
  - f. Refine structure, vision, strategies to adapt to evolving context (e.g. globalizing economy, national policy interest in faith-based services, restructuring in religious and civic sectors)
  
3. **Connect with other faith traditions:** evangelical Christian, Hindu, Muslim, Buddhist and others outside the Judeo-Christian tradition.
  - a. More relationships, by JIF and key partners, within these faith groups
  - b. More knowledge of challenges and success factors for civic engagement here
  - c. Develop and learn from some pilot projects
  
4. **Expand and strengthen knowledge-building and “culture of learning” work.**
  - a. Draw in more knowledge-building institutions, and strengthen network of researchers
  - b. Sponsor further innovations in evaluation, learning and applied research by FBCEs
  - c. Increase dissemination of emerging new knowledge
  
5. **Expand communications of FBCE activities and emerging knowledge.**
  - a. JIF and key FBCE and KBI partners each create a strategic communications plan
  - b. Begin to implement plans, adding capacity as appropriate.

## **Recommended Goals for Evaluation Implementation Start-up (next 6-12 months):**

1. As new or renewal grants are awarded, each FBCE grantee specifies what indicator information it will collect, and how, and by when (relevant to Irvine outcome goals).
2. As grants are awarded, each FBCE grantee designs and begins to implement new internal data-based learning and decision-making practices. These should include (a) both numbers and stories, and (b) attention to progress in the three areas of developing leadership, engaging institutions and impacting communities.
3. Plans are developed to learn from the experience of the new evaluation and reporting systems – e.g. feedback loops involving grantees (we recommend some portfolio-wide convening), Irvine program and evaluation staff, and the portfolio evaluation coordinator.

## APPENDIX A: LITERATURE AND WEBSITES REVIEWED

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March 5, 2001

TO: David  
FROM: Luisa  
SUBJ: Web-search for civic engagement evaluation instruments

Here's a short description of my search for instruments:

I visited several websites. Most had interesting information about community building and organizing but not tools on how to measure civic engagement and participation.

List of websites:

1. Saguardo Seminar ([www.ksg.harvard.edu/saguardo](http://www.ksg.harvard.edu/saguardo)). From them I got a copy of the Social Capital Community Benchmark survey.
2. Center for Community Change – [www.communitychange.org](http://www.communitychange.org)
3. Coalition for Low Income Development: [www.clid.org](http://www.clid.org) – this website had some interesting information on mapping
4. Civic Practices Network: [www.cpn.org/index.html](http://www.cpn.org/index.html)
5. National Civic League: [www.ncl.org](http://www.ncl.org)
6. Community Connections at Iowa State University: [www.extension.iastate.edu/communities/news/Com/ConMenu.html](http://www.extension.iastate.edu/communities/news/Com/ConMenu.html)
7. Institute for Social Research at the University of Michigan and three of the centers under it: [www.isr.umich.edu](http://www.isr.umich.edu), Center for Political Studies: [www.isr.umich.edu/cps](http://www.isr.umich.edu/cps), Survey Research Center: [www.isr.umich.edu/src](http://www.isr.umich.edu/src), and Population Studies Center: [www.psc.isr.umich.edu](http://www.psc.isr.umich.edu)
8. Neighborhoods USA – [www.nusa.org](http://www.nusa.org)
9. Neighborhoods Online: [www.libertynet.org/nol/natl.html](http://www.libertynet.org/nol/natl.html)
10. Blacksburg Electronic Village: [www.bev.org](http://www.bev.org)
11. PICO – had a resource link I couldn't get to because it required a login: [www.pico.rutgers.edu](http://www.pico.rutgers.edu)
12. LaJolla Institute: [www.lajollainstitute.org](http://www.lajollainstitute.org)
13. Sustainable Communities Network: [www.sustainable.org](http://www.sustainable.org)
14. National Community Building Network: [www.ncbn.org](http://www.ncbn.org)
15. League of Women Voters: [www.lwv.org](http://www.lwv.org)
16. Living Democracy: [www.livingdemocracy.org](http://www.livingdemocracy.org)

In addition to these websites I did web-wide searches on civic engagement surveys/tools and didn't really get anything.

## APPENDIX B: PERSONS CONTACTED

Name		Organization	Location
Elizabeth	Anabo	Community Foundation F Silicon Valley	San Jose
Scott	Anderson	California Council of Churches	Sacramento
*Scott	Anderson	California Council of Churches	San Francisco
*Debra	Ballinger	West Coast Industrial Areas Foundation	San Francisco
Dan	Bartholomew	McKnight Foundation	Minneapolis
*John	Baumann	Pacific Institute for Community Organization	San Francisco
Keith	Bergthold	Fresno Leadership Foundation	Fresno
*Jolly	Beyioku	World Vision, Inc.	Los Angeles
Dorsey	Blake	University of Creation Spirituality, Fellowship Church	Oakland/SFO
Joe	Brooks	Policy Link	Oakland/NY
Barbara	Brown	Santa Barbara Foundation	Santa Barbara
Betty	Canton-Self	Interfaith Coalition for Immigrant Rights	San Francisco
Paul	Casey	Metropolitan Organizing Project (PICO affiliate)	Denver
Diane	Chadwick	Hawaii Community Foundation - program officer	Honolulu
Hedy	Chang	California Tomorrow	San Francisco
Polo	Chavez	El Colegio Popular (CT Learning, Inc.)	Fresno
Ram	Cnaan	Univ. of Pennsylvania School of Social Work	Philadelphia
Rev. Jim	Conn	California United Methodist Conference - urban ministries organizer	Los Angeles
*Jim	Conn	United Methodist Church	Los Angeles
Ernie	Cortes	IAF	Pasadena
John	Dalrymple	Central Labor Council of Contra Costa Co./ Faith Works	Martinez/ Emeryville
Tom	Dewar	MacArthur Foundation	Chicago, IL
Grace	Dyrness	USC Center for Religion and Civic Culture	Los Angeles
*Don	Elmer	Center for Community Change	San Francisco
Larry	Ferlazzo	Sacramento Valley Organizing Community, IAF	Sacramento
Janis	Foster	Asset-Based Community Development Institute faculty, community foundations & civic engagement consultant	Memphis
Gwen	Foster	California Endowment	Los Angeles
*Cliff	Gilmore	Oakland Coalition of Congregations	San Francisco
*Larry	Gordon	Bay Area Organizing Committee	San Francisco
Edwin	Hernandez	Pew Charitable Trusts	Philadelphia, PA
Ms.	Jacobs	Faiths Initiative of Santa Barbara County	Santa Barbara
Lupe	Jaime	El Colegio Popular (CT Learning, Inc.)	Fresno
Michael	James	Center for Ethics, Economics and Popular Education	San Francisco
Jim	Keddy	PICO California Project	Sacramento
Ed	Kissam	Aguirre Group	Oakland
Jody	Kretzmann	Asset-Based Community Development Institute	Chicago
Sr. Maribeth	Larkin	IAF	Pasadena
*Sr. Maribeth	Larkin	Industrial Areas Foundation	Los Angeles
Nancy	Latimer	McKnight Foundation	Minneapolis
Dwayne	Marsh	FAITHS Initiative, San Francisco Foundation	San Francisco

*Bill	Masterson	Pacific Institute for Community Organization	Los Angeles
*Don	Miller	Center for Religion and Civic Culture	Los Angeles
Beth	Newkirk	Organizing Apprenticeship Project	St. Paul
David	Portillo	The Denver Foundation - program officer	Denver
*Richard	Ramos	South Santa Barbara County Faiths Initiative	Los Angeles
Janis	Reischmann	Hawaii Community Foundation - VP for Program	Honolulu
Ira	Resnick	Community Foundation of New Jersey - Neighborhood Leadership Institute director, program officer	Morristown, NJ
Wilson	Riles	American Friends Service Committee	San Francisco
Pohai	Ryan	Hawaii Community Foundation - program officer	Hawaii
Tracy	Salkowitz	American Jewish Congress	San Francisco
*Uli	Schmidt	Sacramento Valley Organizing Community	San Francisco
Roja	Singh	Community Foundation of New Jersey - program officer	Morristown, NJ
Rolland	Smith	HUD Community Builder, former Valley Catholic Charities executive director	Fresno
*Ken	Smith	Monterey Bay Organizing Project	San Francisco
*Ron	Snyder	Oakland Community Organizations	San Francisco
Christine	Soto	The Denver Foundation - VP for Program	Denver
Joe	Tierney	Public/Private Ventures	Philadelphia
Ernie	Velasquez	Valley Catholic Charities	Fresno
Theresa	Watanabe	LA Times	Los Angeles

*\*Participated in Community Dialogues on Logic Model*

**Members of Organized Religion Strategic Review Evaluation Team:**

Marty	Campbell	Irvine Foundation - Evaluation Unit	San Francisco
Victor	Kuo	Irvine Foundation - Evaluation Unit	San Francisco
Ky	Lam	Irvine Foundation - Civic Culture Program	San Francisco
Dwayne	Marsh	San Francisco Foundation FAITHS Initiative/ Policy Link	San Francisco/ Oakland
Craig	McGarvey	Irvine Foundation - Civic Culture Program	San Francisco
Don	Miller	Center for Religion & Civic Culture, University of Southern California	Los Angeles
David	Scheie	Rainbow Research, Inc.	Minneapolis
T.	Williams	Rainbow Research, Inc.	Minneapolis

## APPENDIX C: DESIGNS FOR STRATEGIC REVIEW PROJECT MEETINGS

This appendix includes the desired outcome goals, agendas, and key documents discussed in the strategic review's five major meetings: the Evaluation Team meetings on August 2-3, 2000, and January 4, 2001, the Dialogues with Community Partners on the emerging logic model and evaluation framework on February 26 and February 28, 2001 and the final Evaluation Team meeting on March 30, 2001.

### **Strengthening California's Pluralist Democracy Through Partnership with Faith-Based Institutions:**

#### **LOGIC MODEL WORKSHOP Examining the James Irvine Foundation's Organized Religion Program Portfolio**

**Wednesday-Thursday, August 2-3, 2000**

James Irvine Foundation Offices  
San Francisco, CA

Participants:

Craig McGarvey and Ky Lam, JIF Civic Culture Program  
Marty Campbell and Victor Kuo, JIF Evaluation Office  
Don Miller and Dwayne Marsh, Portfolio Grantee Partners

facilitated by David Scheie and T. Williams, Rainbow Research

#### ***DRAFT PROSPECTUS***

### **DESIRED OUTCOMES**

By workshop's end we will have generated...

*Primary outcomes:*

- 1) A clear depiction of the program's current logic model (*"what is it?"*)
- 2) A thoughtful critique of current logic model (*"what are its strengths and weaknesses? Its gaps, redundancies, contradictions?"*)
- 3) Priorities for Rainbow's subsequent field and analytical work (*issues to explore, models to examine, people to hear from, literature to review*)

*Secondary outcomes:*

- 4) Increased capacity for effective collaboration among participants (*more awareness of self's and others' interests, history, talents; more trust, safety & mutual respect; more clarity re roles, timeline in this project*)
- 5) New energy, insights for their own work (*so we leave in better shape than when we arrived*)

## AGENDA

### Day 1: Wednesday, August 2

- 1000-1015 Welcome. Review goals, agenda. Brief grounding: how do I feel, what are my goals for this meeting, what do I need so that I can contribute my best here.
- 1015-1030 Briefing by Rainbow Research: early findings from field/grantee contacts:  
a) re strengths, weaknesses of current JIF program logic model  
b) re emerging issues, trends, opportunities in organized religion/civic culture
- 1030-1130 Filling Out the Program Logic Model I:  
Vision of program's ultimate goals (*what kind of civic culture in Calif. do we want to see?*);  
Assumptions re:  
Current Situation (*where are we now? what's current state of Cal civic culture?*),  
Resources (*what can help get us to our desired vision?*),  
Barriers (*what's blocking us from achieving our desired vision?*)
- 1130-1215 Program's short-term goals, and mid-range goals  
(*What results do you want to see 1998-2001? What results in 2002-2005?*)
- 1215-100 LUNCH
- 100-300 Filling Out the Model II: Program Strategies: (Grantmaking & Programming Activities)  
a) Broad strategies: how are you mobilizing key resources and trying to surmount key barriers?  
b) Concretely:  
- What activities is JIF funding (and which are you not funding)  
- Who is JIF funding (and who not)  
- Under what terms is JIF funding (scale, timeline, stipulations, etc.)  
- What is JIF doing besides funding, e.g.  
    > convening, matchmaking, brokering  
    > promoting a "learning culture"  
    > interpretation, advocacy  
    > other?

[Rainbow presents a description of present programming actions & choices. Group provides modifications as necessary, then discusses strengths, weaknesses, surprises, puzzles they see in this picture. Especially: Will these program investments lead to the desired short-term, mid-range and long-term results? How, and to what extent? Where are the gaps and contradictions? How should grantmaking and programming emphases shift over time, in response to short-term, mid-range and more-distant challenges/opportunities? -- so that later investments build on earlier accomplishments?

300-500 p.m. Filling Out the Model, III: Revisiting Expectations of Early, Mid-Range and Long-Term Impact  
- Do the short-term, mid-range and long-term goals still make sense? Are they in the right sequence? What's not likely to happen? What else might happen?

BREAK/DINNER

Overnight assignment: what are the gaps, contradictions, puzzles in present logic model?

(Rainbow cleans up, organizes flipchart comments as necessary)

**Day 2: Thursday, August 3:**

830-900 a.m. Breakfast together

900-1100 Grounding: check-in; today's outcome goals; needs for personal effectiveness.  
Brief walk-through of model as developed on previous day.  
Critical reflection on the model (report-out from overnight thoughts)  
a) "Objective" strengths, weaknesses, questions.  
b) Subjective: what am I personally excited by, or troubled by, in this?

1100-1200 Indicators, Learning, Evaluation  
Experience to date: what have been the indicators and processes, and which have been most useful?  
What have been the biggest difficulties?  
What have been the key lessons about doing evaluation & learning well?

1200-1230 LUNCH

1230-100 Wrap-up  
- Rainbow next steps: Priority issues to explore (*summarized from logic model critique*), models to examine, contacts to make, literature to review (*suggestions may be sent to Rainbow via e-mail in next week*)

- Project overall: timeline, process, roles moving forward

- Evaluation of this meeting:

> goals reached?

> process: highs, lows, strengths, weaknesses

> personal reflections, learnings

100 ADJOURN

## **CREATIVE PROCESS POSSIBILITIES**

Storytelling: “Aha!” and “Oh, no!” moments in the portfolio to date

Personal stories, reflections on:

- why this work is important, why we do it
- what strong civic participation looks like and why we value it
- what faith-based institutions can do to strengthen civic life; why they are important resources

- why these strategies are near and dear to us:

- (a) civic work of congregations,
- (b) networks of congregations and other faith-based organizations
- (c) partnerships between practitioners and applied researchers in this field

Imagery: Metaphors, images for what this portfolio is about:

- what kind of tree, plant, animal best represents what this program is to you?
- what kind of village or community analogy expresses your hope? (e.g. Spaceship Earth, It Takes a Village, Gilligan’s Island...)
- what songs or slogans best express the spirit of what you’re trying to do in this portfolio?
- if you were to draw a picture showing how you feel about this portfolio, what would it look like?

Schmoozing: >When you’re at your family picnic, what do you most like to tell your brother-in-law about this portfolio? What question do you most hope *doesn’t* come up?

> When you find yourself riding in the elevator or walking into the restroom with a Foundation trustee, what do you most want to tell them about this portfolio? What question or response are you most afraid of?

Exercises such as these might be inserted...

- on Wednesday morning as we’re getting started;
- on Wednesday afternoon as we talk about what JIF is doing given its vision and assumptions, or about your expectations of short-term and longer-term impact;
- on Thursday morning as we reflect critically on the strengths and weaknesses of present model;
- on Thursday afternoon as we wrap-up and prepare for next steps in this process;
- over dinner Wednesday night to celebrate, relax, and enjoy our full loopy intelligence.

**Promoting Civic Engagement Through Organized Religion:**

**Refining the Theory of Change (the “logic model”)  
for the Irvine Foundation’s Organized Religion Portfolio**

**SECOND MEETING of the EVALUATION TEAM  
January 4, 2001**

James Irvine Foundation Offices  
San Francisco, CA

**Desired Outcomes:**

By day’s end,

- 1) All participants will have a thorough knowledge of the draft logic model for this portfolio, including key strategies, anticipated short-term outcomes and long-term outcomes.
- 2) Evaluation Team members will have voiced their key insights and concerns regarding strengthening the draft logic model.
- 3) Model revisions to incorporate the combined insights of Evaluation Team members will be identified, or at least a process for responding to those insights will be identified.
- 4) For some outcomes in the model, indicators, populations, thresholds, targets and timelines will be identified.
- 5) Remaining steps and timeline for this Strategic Review Project will be identified.

**Proposed Agenda:**

- 9:00-11:00** Walk through of new logic model draft, led by Rainbow Research.  
—clarifying questions are voiced and resolved;  
--items for further consideration (additions, deletions, revision) are identified.
- 11:00-2:30** (Includes lunch) Continue w/ dialogue on items for further consideration
- 2:30-4:00** Indicators  
—review of current examples  
—generate ideas for indicators etc. on other outcomes
- 4:00-4:30** Next steps & timeline for remainder of this project  
—involving field partners  
— involving Evaluation Team  
— any key interviews or lit reviews remaining
- 4:30-5:00** Wrap-up and evaluation of the day.

February 22, 2001

Dear Colleague:

Thank you for your willingness to advise the Irvine Foundation as we update and refine our Organized Religion program and evaluation framework. Ky Lam and I are looking forward to seeing you next Monday, February 26, 10:00-3:00 at the Irvine Foundation offices. Please see attached instructions for directions and parking information.

Enclosed are materials to help you get ready for that meeting. They include an agenda with desired outcomes, a background summary of the strategic review project of which this meeting is part, a diagram showing the “theory of change” or “logic model” that has been drafted so far, a sampler of possible evaluation indicators for the portfolio, and a list of meeting participants. An expense reimbursement form for your travel expenses is also enclosed.

As you’re preparing for the meeting, we encourage you to think about the questions listed in the “dialogue” section of the agenda. In particular, please think about the outcomes you hope and expect will be achieved by faith-based civic engagement in the next 5-7 years. Does this draft model include your top-priority outcomes? After that, think about what strategies are most likely to lead to those outcomes, and what resources are essential for achieving these outcomes. Finally, you might reflect on the sample indicators shown. Are they relevant? Credible? Do-able?

At this meeting we look forward to reviewing, with you and other important community partners, the strategic framework that has been under development for the past several months. We want you to know how the Foundation’s thinking is evolving in the area of faith-based civic engagement. And we want to hear your thoughts about likely outcomes, and important strategies, for this body of work in the next few years. We recognize that the Foundation is dependent for its success on the efforts and talents of its community partners, and we want to tap your wisdom at this important juncture in portfolio planning. Your input is vital for helping us develop a framework that accurately reflects the real challenges and opportunities in this work – a framework that will be useful for guiding progress, providing accountability, strengthening learning, improving communications and attracting more support for this vital community-building work.

If you have any questions or comments, please feel free to contact Ky or me, or our evaluation consultants in this project, David Scheie and T. Williams of Rainbow Research (612-824-0724). Once again, thank you for your partnership, and we look forward to seeing you next week!

Sincerely,

Craig McGarvey  
Program Director, Civic Culture

enclosures

**Dialogue on Emerging “Logic Model”  
for the  
James Irvine Foundation’s Organized Religion Portfolio**

**10:00 a.m. – 3:00 p.m.**

**Monday, February 26, 2001: San Francisco  
Wednesday, February 28, 2001: Los Angeles**

**Desired Outcomes**

1. Field partners understand Irvine's current vision for the future of this portfolio: they can see where Irvine's thinking is headed and how they might connect with Irvine's interests.
2. Evaluation team gathers input that makes the logic model more realistic and insightful.
3. Field partners feel heard and valued as partners, and begin to build ownership of the portfolio logic model.
4. Relationships are strengthened among all participants.

**Agenda**

- |       |  |
|-------|--|
| 10:00 | Introductions; background on strategic review project; review day’s goals & agenda   |
| 10:30 | Walk-through of draft logic model; clarifying questions raised and addressed   |
| 11:15 | Dialogue on logic model:<br>-- Are these outcomes desirable? Is this what you hope and expect to be achieved in the next 5-7 years? If not, what do you think are the key desired outcomes?<br>-- Given these outcomes, are these strategies plausible? If not, what strategies do you think are most likely to achieve these outcomes?<br>-- Given these outcomes, are these the key resources? If not, what do you think are the key resources necessary for achieving these outcomes? |
| 12:00 | Lunch  |
| 1:00  | Dialogue on logic model continues  |
| 2:00  | Introducing indicators   |
| 2:45  | Wrap-up, next steps, evaluation of the day   |
| 3:00  | Adjourn  |

**Evaluation Summary:  
Strategic Review of James Irvine Foundation's Work  
to Promote Civic Engagement through Faith-Based Institutions**

Conducted by Rainbow Research, Inc.

**Context**

This formative evaluation is intended to improve the conceptual framework or “logic model” for the Organized Religion portfolio and develop an evaluation design for it. The primary audience is The James Irvine Foundation. A secondary audience is other foundations in the arena of civic culture and faith-based institutions, and a third audience is current and prospective Irvine grantees. The strategic review began in late May, 2000, and is expected to finish by February or March, 2001. David Scheie and T. Williams of Rainbow Research, Inc. are conducting the review.

The portfolio's goal is to partner with faith-based institutions to draw new and low-income Californians into greater civic engagement. To date it has pursued three strategies intended to build capacity, bridges and knowledge in this field. It has supported:

- 1) efforts by congregations and other faith-based institutions to draw new and low-income Californians into greater civic engagement, with grants shaped to encourage intentional learning toward improvement;
- 2) networking among faith-based institutions involved in such civic engagement work, to learn from one another and increase inclusivity in the work; and
- 3) partnerships between faith-based practitioners and applied researchers, to build and disseminate useful knowledge from developing practice.

Since 1997, this portfolio has made grants totaling about \$9 million. About a quarter of this has gone to projects in the Central Valley, another quarter into southern California, a third into statewide projects, and the remainder into Bay Area activity. Congregation-based community organizing networks have received nearly half of the funding, with other models of faith-based civic engagement and networking receiving about a third and knowledge-building projects receiving about 20 percent of the funds. Grants have funded a mix of core operations, projects, capacity-building, and documentation/research/evaluation.

**Questions**

At the project's core are these questions:

- 1) To what extent has Irvine used effective philanthropic tools and approaches to pursue the portfolio's goal of mobilizing the strengths of organized religion to draw new and low-income Californians into greater civic engagement?
- 2) What appear to be the most promising strategies and leverage points for pursuing this goal, given the changing environment and emerging knowledge?
- 3) How can those strategies and leverage points be woven into a coherent framework or “logic model” to guide improved decisionmaking in this portfolio over the next three to five years?

- 4) What are appropriate indicators for evaluating progress and guiding midcourse adjustments, given the new logic model being developed?

This is not an evaluation of individual grantee projects. Individual projects are being examined as a basis for assessing the philanthropic tools and practices used by the Foundation and to identify appropriate strategies, leverage points and expectations for Foundation impact in this arena.

## **Methods**

Project methods are qualitative and participatory. They include semi-structured interviews, documents review, and collaborative critical reflections. The emphasis is on rigorous logic developed collaboratively and iteratively with diverse stakeholders. Methods specifically include:

- 1) Work with an evaluation team consisting of Foundation program and evaluation staff and selected grantee partners to articulate the “logic model” currently guiding the portfolio;
- 2) Review Foundation and grantee documents, and interview grantee representatives, to identify strengths, weaknesses and significant accomplishments or setbacks in the portfolio’s work to date;
- 3) Review literature in the field, and interview voices from the field including other funders, scholars, consultants, evaluators, and faith-based leaders, to identify key trends and opportunities that an updated portfolio logic model might address; and
- 4) Convene small groups of grantees and other external stakeholders to refine the emerging logic model, which will be finalized in consultation with the core evaluation team.

## **Findings**

Preliminary findings include the following:

- The Foundation’s conduct is highly regarded by grantees. Grants are for appropriate, important purposes, and useful in scale and timeline. The Foundation is praised for respecting grantees’ own knowledge and judgment, for not being directive or arrogant, and for its skill in bridge-building, bringing together diverse actors with mutual interests for powerful collaboration.
- Funded projects have achieved considerable success in the core goal of increasing civic engagement by Californians of low-income or newcomer status. Thousands of such people are becoming more active in various civic roles, and are developing relevant skills, knowledge, attitudes and relationships. Structures for increased civic engagement are growing in size, number and capacity. Structures for knowledge development in this field are expanding, including academic and independent applied research centers, and partnerships between applied researchers and practitioners.
- Despite this progress, faith-based civic engagement structures must expand much further to provide access for most new and low-income Californians. Structures for knowledge development are still small relative to the size of this field.
- Other challenges in the current program framework include: Public communications strategies are under-used throughout the portfolio and warrant more attention. Growth in faith-based civic engagement is limited by a shortage of skilled organizers and volunteer tutors; limited training and mentorship available for these key roles; a limited range of active roles in some models; and rudimentary curricula for incorporating experiential citizenship education into

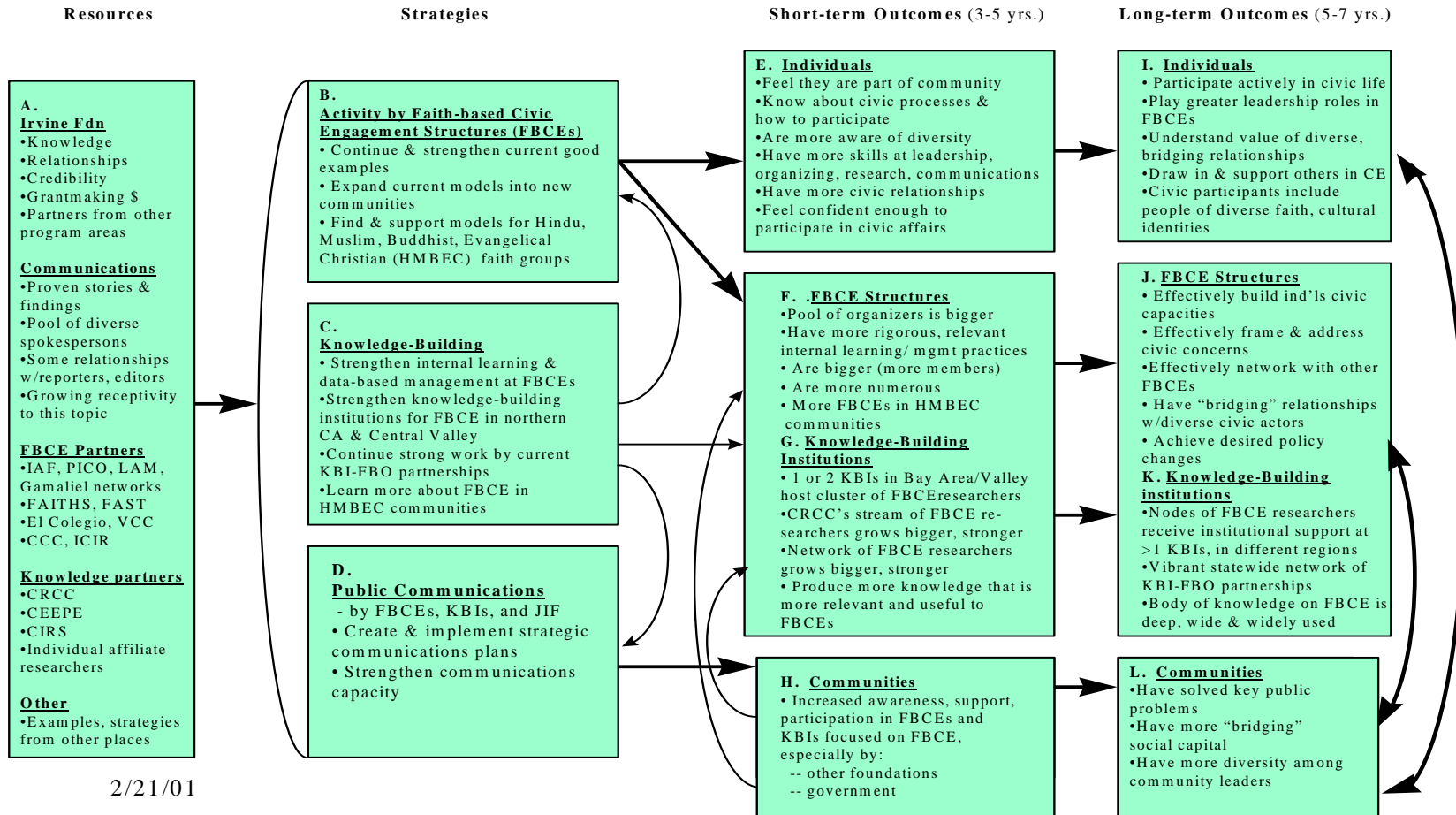
naturalization classes. Additionally, the portfolio needs better strategies for recognizing and leveraging the civic strengths of faith groups outside the Judeo-Christian tradition and of theologically conservative Christians.

An upgraded logic model and evaluation indicators responding to these and other findings will be developed in the project's latter stages.

### **Evaluator**

Rainbow Research, Inc. is a nonprofit firm providing evaluation and effectiveness products and services. Founded in 1974, Rainbow's work includes evaluation, program development, planning, convening, and adult learning facilitation. Rainbow Research works in many fields including neighborhoods, leadership development, education, arts, economic development, food systems, multiculturalism, faith-based action, youth and family issues. Rainbow specializes in projects that bring marginalized populations to the center of community life and public problem solving. Its executive director is Barry Cohen. David Scheie is associate director and T. Williams is senior project associate. Contact information: Rainbow Research, 621 W. Lake Street, Minneapolis MN 55408, 612-824-0724, rainbowresearch@mtn.org.

Diagram 1: Organized Religion Portfolio's Overarching Theory of Change, 2001 -



2/21/01

James Irvine Foundation Organized Religion Portfolio

Evaluation Framework, 2001: Some Possible Indicators  
with Populations, Thresholds, Targets and Timelines

DRAFT, 2/21/01

Evaluation Focus	Indicators	Methods
<b>Short-term Outcomes, Individuals:</b>		
E.2. Know about civic processes and how to participate.	Can identify their school superintendent and/or state assembly-person.	Participants survey.
<b>Short-term Outcomes, Faith-Based Civic Engagement structures (FBCEs):</b>		
F.3. More members.	# of FBO members. # of individuals participating in major public actions.	FBCE records. FBCE records.
<b>Short-term Outcomes, Knowledge-Building Institutions (KBIs):</b>		
G.4. More relevant, useful knowledge is produced.	# of requests by FBCE practitioners for KBI publications.	KBI records.
<b>Short-term Outcomes, California Communities:</b>		
H.2. More awareness & support for FBCE by govt.	# of public officials responding publicly to concerns voiced by FBCE structures.	FBCE records.
<b>Long-term Outcome, Individuals:</b>		
I.4. Participants draw others into civic engagement.	First-year participants credit experienced participants with drawing them in.	Survey of 1 <sup>st</sup> year participants.
<b>Long-term Outcomes, FBCE structures:</b>		
J.4. FBCEs have "bridging" relationships with diverse civic actors.	Ratio of FBCE relationships with corporate & govt. decision-makers.	FBCE records.
<b>Long-term Outcomes, KBIs:</b>		
K.1. At least two KBIs, in two different regions, give institutional support to FBCE applied research.	# of KBIs with policy commitment, and financial commitment of \$50k/yr., for FBCE research.	KBI records.
<b>Long-term Outcomes, Communities:</b>		
L.2. Communities have more "bridging" social capital.	# of FBCE participants on first-name basis with 2 people of a different native language.	Participants survey.

**E. Short-term Outcomes, Individuals:**

**Outcome E.2.: Individuals know about civic processes and how to participate.**

Indicator: Percentage of participants who agree that "I know who my school superintendent is."

Population: All FBCE participants involved since last year or before.

Threshold: (how good is "good enough?"): 50% of population know this.

Target: (desired level of progress:) 80% of population know this.

Timeline: Threshold achieved by 7/1/02, and target by 2 years after threshold.

**F. Short-term Outcomes, Faith-based Civic Engagement structures (FBCEs):**

**Outcome F.3: FBCEs are bigger (more members).**

Indicator 3a:	Number of congregations and other faith-based organizations belonging to FBCE structures.
Population:	All FBCE structures receiving Irvine support.
Threshold:	(how good is “good enough”): 10% increase per year in total number of member FBOs, across all structures.
Target:	(desired level of progress): 20% increase per year in total number of member FBOs, across all structures.
Timeline:	Using 7/1/2001 as baseline, threshold achieved by 7/1/02, and target achieved two years after threshold

**K. Long-term Outcomes, Knowledge-Building Institutions**

**Outcome K.1: Nodes of FBCE researchers receive institutional support at two or more knowledge-building institutions, in at least two regions of California.**

Indicator:	Number of KBIs that host at least three people doing applied research in partnership with Irvine-supported FBCEs, where the institution has made a policy commitment and a financial or in-kind commitment of at least \$50,000/year to support such research.
Population:	All KBIs hosting applied researchers who are partners with Irvine-supported FBCEs.
Threshold:	Two institutions have committed their own resources at this scale
Target:	Three institutions, in southern California, the Central Valley, and the Bay Area, have committed their own resources at this level.
Timeline:	Threshold achieved by 12/31/06, and target by two years after threshold.

**L. Long-term Outcomes: Communities**

**Outcome L.2: Communities have more “bridging” social capital.**

Indicator:	Number of FBCE participants who report they are on a first-name basis with at least two people with a different native language than their own, in response to a survey or interview question.
Population:	All participants in FBCEs receiving Irvine grant support.
Threshold:	50% more participants who report this than in baseline of 2001.
Target:	100% more participants who report this than in baseline of 2001.

**Final Evaluation Team Meeting  
for the  
Irvine Foundation's Organized Religion Strategic Review Project**

**REVISED AGENDA: 10:00 a.m. – 2:00 p.m.  
Friday, March 30, 2001: San Francisco**

**Desired Outcomes**

1. All team members sufficiently understand the new logic model and framework and its intended uses, so that they can explain it to their key constituencies related to this portfolio.
2. Any necessary changes to logic model and evaluation framework are identified, so that Rainbow can finalize documents by April 7 for Foundation use in the next stage of portfolio operations.
3. Key early challenges in operationalizing the model and framework are identified, and appropriate strategies are generated for dealing with those challenges.
4. Results and lessons from this Strategic Review project are identified and reflected upon, so that we can learn from this experience and enhance our effectiveness in the future.

**Agenda**

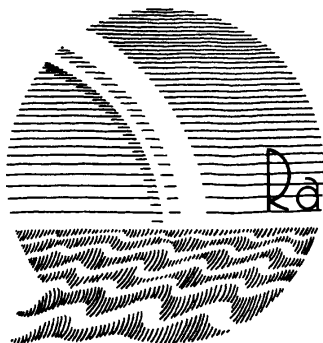
- |       |   |
|-------|---|
| 10:00 | Introductions; review day's goals & agenda  |
| 10:10 | Debrief field meetings of February 26 and 28: lessons for program and evaluation planning.<br>— What was validated for you?<br>-- What new insights that advance plans for the portfolio?<br>-- What key unsolved dilemmas? |
| 11:00 | Strategic Program Priorities (see attached list, and discussion questions)  |
| Noon  | Lunch   |
| 12:30 | Strategic Evaluation Issues (see attached discussion questions)   |
| 1:40  | Critique of this project:<br>-- strengths, accomplishments<br>-- difficulties, mistakes;<br>-- lessons to carry forward   |
| 2:00  | Adjourn   |

#### ABOUT RAINBOW RESEARCH, INC.

The mission of Rainbow Research, Inc. is to help socially concerned organizations become more effective in their efforts to build healthier, stronger and more vital communities. Our activities are designed to promote and strengthen program impact, service quality, and organizational capacity.

Strategies include conducting evaluation studies, developing program improvement tools and support services, and creating opportunities that assist issue fields in integrating principles of program effectiveness into program practices and policy development.

“Socially concerned organizations” include those nonprofit organizations, foundations, government agencies, membership associations, religious institutions, citizen groups, and advocacy networks that intend to respond productively to social problems and aspirations.



Rainbow Research Inc.

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