

# Developing the Civic Infrastructure to Launch Family Prosperity Demonstrations

## Timeline and Evaluation of Phase V of the Pathways to Prosperity Project

(November 2012 – November 2013)

## What?

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Citizens League mission and project work plan require that civic infrastructure be developed directly through the use of civic organizing to create policy solutions, not only related to public assistance policy, but related to all governing (policy) decisions in the lives of participants. The over-arching term that the Citizens League uses for this ongoing form of organizing is Civic Policy Making.

Within the organizing process of Civic Policy Making, ongoing evaluation is required to judge the use of disciplines and the effectiveness of developing solutions. To the extent that a hierarchy therefore exists in Civic Policy Making, it is in the sense that the organizing process encompasses all other functions and that without evaluation the work cannot progress and improve.

### Organizing

### Family Groups

### Policy

### Evaluation

In the timeline to follow, “family groups” and “policy” are broken down by color in addition to the functions of organizing and evaluation (which essentially act as bookends) to help differentiate the types of activities that are integrated through Civic Policy Making.

## November 2012

11.21.12 (Evaluation): Meet with Anna Kiel Martin to begin work on evaluation plan

- Discuss data points to collect
- Possible approach to case study design
- Remain open/flexible for change
- Government help with data for comparison groups
- Dual purposes: outcome/impact + documenting process

11.25.12 (Evaluation): Anna Kiel Martin lays out next step of evaluation tasks

- Develop indicators
- Assist determining family selection criteria
- Check monitoring systems of partner agencies
- Develop case study methodology
- Identify primary end users and audience of evaluation
- Regular time for reflection and learning with site teams and civic organizers
- Expected facilitation with family groups regarding data collection

## December 2012

12.4.12 (Organizing): Family Prosperity Civic Organizing Agency (FPCOA) Meeting

- Governing documents will be co-authored
- Planning for upcoming Power Analysis
- Evaluator will be invited to the organizing agency
- Timeline and roles sketched out
- Will continue work to determine how participation affects public assistance for families

12.4.12 (Family Groups): Meet with Minnesota Indian Women's Resource Center

- Continue to introduce and establish that Civic Policy Making will guide process
- Gain agreements on next steps

12.4.12 (Family Groups): Meet with Community Action Partnership of Ramsey and Washington Counties

- Continue to introduce and establish that Civic Policy Making will guide process
- Gain agreements on next steps

12.10.12 (Organizing): Citizens League Organizing Agency (Civic Non-Profit)

- Staff Retreat
- What worked? Focusing on stronger and more deliberative use of more of the disciplines to build a more deliberative infrastructure.
- What didn't work? Too much reaction to other expectations that are organized to other approaches to policy making. Member/service tension remains a difficult dynamic to organize.
- What do we need to do differently? Gap analysis reveals that we need to: 1.) Quit trying to be all things to all people. It is too easy to try and connect numerous existing policy efforts because we are able to see the big picture. 2.) Be more deliberative and more aggressively front-load Civic Policy Making. 3.) Create and get comfortable with more teaching moments.
- Key leaders continue to impose their training from other approaches to policy making.

12.13.12 (Family Groups): Circles of Support phone meeting

- Continue to introduce and establish civic organizing approach that will guide process
- Gain agreements on next steps

12.14.12 (Policy/Legislative): Asset Building Coalition meeting

- Explain family prosperity approach to group focused on legislative policy change
- Savings promotion raffle and microfinance emphasis (lending circles)

12.17.12 (Evaluation): Anna Kiel Martin and Bob DeBoer meeting

- Deepen shared understanding of civic organizing
- Introduce concept of Developmental Evaluation
- Focus on organizer role and family eligibility/characteristics

12.19.12 (Policy/Legislative): Meeting with Representative Huntley

- Go over need for income and asset exclusion

12.28.12 (Organizing): Working team meeting with Dan Schultz

- Citizens League member offers specific expertise for the working team within the organizing process.

12.31.12 (Organizing): Family Prosperity Civic Organizing Agency Meeting

- Continue framing for power analysis
- Outline roles for organizations that want to participate to FPCOA
- They will need to have appropriate governing authority
- There will be enough flexibility for broader participation in a network to accomplish the specific work, but participation on the organizing agency will require commitment to Civic Policy Making.

## January 2013

1.4.13 (Family Groups): Trip to Grand Rapids, MN to visit Circles of Support

- Continue to introduce and establish how Civic Policy Making will guide the process
- How does the restructuring of resources affect staff? The conditional cash transfer (CCT) payment structure?
- Circles of Support is now beginning to work with people on SSI. How does this align with the family prosperity approach and civic organizing when people who are permanently disabled and never expected to work again are less socially and politically acceptable to some?
- Civic organizing would recognize use of the disciplines in a wide variety of group and community settings. The key is applying civic organizing to achieve some kind of initiative that improves the family situation.
- Circles of Support agrees to remain involved as a potential participant.

1.8.13 (Organizing): Minnesota Active Citizenship Initiative (MACI) organizing agency meeting

- Focus on the stages of each demonstration (business, non-profit and faith) at the midpoint of the 2012-2013 work plan and assess how we move forward.
- Fundamental purpose of the work plan is to build a base for civic organizers.
- Simplified graphic of civic process developed and available for use.

1.15.13 (Family Groups): Pillsbury United Communities meeting

- Continue to introduce and establish civic organizing approach that will guide process
- Gain agreements on next steps

1.17.13 (Organizing): Minnesota Active Citizenship Initiative (MACI) Institute

- Discuss and develop civic organizing work and case studies in the entire cross-sector base (Citizens League, Kowalski's, Islamic Civic Society)

1.24.13 (Family Groups): CAP of Ramsey and Washington Counties meeting

- Continue to introduce and establish that Civic Policy Making will guide the process
- Gain agreements on next steps

1.30.13 (Organizing): Citizens League Organizing Agency (Civic Non-Profit)

- Case study must show that I know how to put together an organizing agency based on my role.
- Today's check-in is around identifying what is a governing question. First you ask, "What is going to impact someone in the organizing base?"

1.31.13 (Evaluation): Anna Kiel Martin phone call with Jorge Blandin (Family Independence Initiative)

- Learned about "liaison" role
- FII recruitment, introduction and group formation practices
- Subtlety of cash transfers in FII – not pre-linked to goals
- Learn opportunity to use FII's on-line data system
- Additional notes available

1.31.13 (Family Groups): Phone call with Leaders Partnering to End Poverty (Staples-Motley)

- Group of community leaders including officials from multiple counties interested in implementation of Family Prosperity Groups
- Connected with Circles of Support in Grand Rapids and Blandin Foundation.

## February 2013

2.5.13 (Organizing): Family Prosperity Civic Organizing Agency

- Power analysis work begins

- Bob will test and teach power analysis with working team.
- Focus on integrating the evaluation function with Anna Kiel Martin.
- Next meeting will include check-ins on recruitment strategies, legislative activity, emerging evaluation and family demonstration methodology, partner participation, and the strategy of cash payments.

#### 2.6.13 (Policy): Legislative event on Family Prosperity Demonstrations

- Over-arching presentation on the policy development that led to Family Prosperity Demonstrations and why we need an income and asset exclusion at the 2013 Legislature.
- 25-30 attendees from a variety of interested organizations, Citizens League members, and government agencies.

#### 2.6.13 (Policy): Meeting with Ashoka representative Spectra Meyers

- Founder of Family Independence Initiative (Maurice Lim Miller) is an Ashoka Fellow.
- Discussion of possible ways to begin to connect the two efforts more intentionally.

#### 2.8.13 (Organizing): Working team meeting with Dan Schultz, Andrea Drewek, Anna Kiel Martin

- Recruitment and eligibility of families; families are eligible for public assistance but don't have to be using public assistance (open question)
- Integration of civic organizing into family participation still unsure of method
- Integration of civic organizing with partner agencies; what is required?
- Additional notes available

#### 2.15.13 (Organizing): Working team meeting with Stacey Millett

- Citizens League member who has been involved in all phases of the project offers her expertise to assist in future funding connections as well as ongoing policy work.

#### 2.19.13 (Policy/Legislative): Meeting with Representative Murphy

- Discussion of candidates to author income and asset exclusion

#### 2.26.13 (Organizing): Citizens League Organizing Agency meeting (Civic Non-Profit)

- How do we train for organizing when we potentially have new participants at a variety of levels and representing everything from family to state agency perspective?
- One-on-one meetings are the primary educational track by which people can choose to commit to be on the FPCOA. Other participants can be thought of as in a broader network with the potential to become organizers in the future.
- We must perform a power analysis with partners. Then organize and negotiate agreements before family groups are launched.
- The work plan produced by the power analysis is essentially the "common ground."

#### 2.28.13 (Policy/Legislative): Meeting with Representative Halvorsen

- Citizens League member agrees to author legislation

- Rep. Halvorsen queries whether this could be a tool to create civic infrastructure for those who age out of foster care. Big gap in current service system. No transition.
- Minnesota Department of Human Services agrees to provide technical support.

## March 2013

### 3.5.13 (Organizing): Family Prosperity Civic Organizing Agency (FPCOA)

- Power analysis leads us to begin deeper thinking on the creation and ongoing growth of the FPCOA in order to best govern Family Prosperity Demonstrations.
- Make sure that the FPCOA supports organizers at the community and agency level; supports the FPCOA itself, and impacts the Citizens League policy agenda.
- Discussion of training/educational options to invite participants to take part in the FPCOA directly.

### 3.11.13 (Policy/Legislative): Meeting with Senator Clausen

- Agrees to author companion legislation

### 3.12.13 (Organizing): MACI Organizing Agency

- Focus on each organization (business, faith and non-profit) and how they define their base by use of Civic Policy Making. This determines the membership in MACI and we must have consistency in this determination even though it varies from organization to organization because of their different structures.

### 3.18.13 (Evaluation): Developmental Evaluation primary questions articulated

- Is the Civic Policy Making process building social capital? (**civic infrastructure**)
- Is the Civic Policy Making process and approach to public assistance more effective than the existing approach?
- Are we acting in alignment with Citizens League Operating Principles? (**Governing Document**)
- How has policy pertaining to public assistance changed as a result of the Pathways to Prosperity pilot and underlying civic organizing activities?

### 3.20.13 (Policy/Legislative): Senate Health and Human Services Committee hearing

- Testify to include income and asset exclusion in the Omnibus Health and Human Services bill

### 3.21.13 (Organizing): MACI Institute

- Focus on the three main measures for evaluation in civic organizing.
- Define work with Anna Kiel Martin as a new opportunity to evaluate what we do with expertise from the evaluation field (existing system).
- It is important to see yourself as a leader who teaches in all organizing situations.

- People who are organized by an existing approach to policy (electoral, advocacy, community-based, service) will tend to think that “common good” is a feel good concept. In practice it is not!
- For example, the discipline of public meeting agenda (and evaluation) requires that any meeting cannot be only to solve a specific problem unless you are laying out the primary purpose under Civic Policy Making and using the approach as you work. You must make the connection to the work plan and the MACI purpose.

#### 3.25.13 (Evaluation): Meeting with Anna Kiel Martin

- Dissect civic organizing use of evaluation language and methods
- Track where family goal setting ties into policy development
- Barrier identification for agencies and tracking how agencies change
- Using developmental evaluation to capture the unexpected

#### 3.26.13 (Family Groups): Pillsbury United Communities meeting

- Expand discussion of Civic Policy Making and how the organizing approach will govern the project.

#### 3.27.13 (Family Groups): Circles of Support phone meeting

- Expand discussion of Civic Policy Making and how the organizing approach will govern the project.

#### 3.27.13 (Evaluation): Peg Michels and Anna Kiel Martin

- Deep background on civic organizing
- Focus on power analysis and the role of evaluation in civic organizing

#### 3.28.13 (Family Groups): Follow-up Pillsbury United Communities meeting

- Think about PUC population and who might be good candidates based on less barriers under existing law.

## April 2013

#### 4.1.13 (Family Groups): Project for Pride in Living meeting

- Significant progress on determining the role of a partner organization in implementation
- Since the existing system of public assistance delivery has barriers to establishing Family Prosperity Groups, any person involved with the families from a service organization cannot have another direct role with any family that conflicts with the process.
- PCs for people. PPL could be the link for us to buy computers for family groups.

#### 4.1.13 (Policy): Meet with Ron Elwood and others at Legal Services Advocacy Project

- Agreement that our purposes are aligned

- Agreement that Ron will take the lead in guiding legislation through the rest of the legislative process.

#### 4.2.13 (Organizing): Family Prosperity Civic Organizing Agency

- How to orient and include partner agencies in civic organizing.
- Training is not really the best term, because the role of the organizer is to use civic policy making to define the need and get agreement across the different entities; not to tell them what to do (other than process) or give them the “right” answer.
- Update the partner agencies with latest agreements and find out if they agree.
- Bob must establish organizing relationship with each individual.

#### 4.3.13 (Family Groups): CAP of Ramsey and Washington counties meeting

- Agree with continued involvement based on latest agreements.

#### 4.5.13 (Family Groups): Leaders Partnering to End Poverty phone meeting

- Agree with continued involvement based on latest agreements.

#### 4.18.13 (Organizing): Working team meeting

- “Goal-setting” is not really a compatible term for Civic Policy Making or for the work that Family Independence Initiative (FII) is pioneering.
- FII is looking for families to develop and define initiatives in whatever way makes sense for the family and to essentially document what does and doesn’t work.
- The Citizens League mainly seeks to ensure that Civic Policy Making is the method by which families and organizations participate.
- The accountability for families is radical in either case in that the agreement they make is to participate in the process of building capacity and providing information and evaluation on what happens. This is a big departure from the service approach to policy.
- The initial agreement is not to achieve specific goals in the way that is commonly understood. Initiatives that produce specific goals will be a natural outgrowth of the process.
- The agencies that we are working with will be participants and “witnesses” to the process. They are conduits to establish the families, but do not direct them. (Civic Policy Making by definition cannot be limited to the family groups; we must also work to build the civic infrastructure that will change policy in organizations and government over the long term.)

#### 4.19.13 (Family Groups): LPEP multi-county call

- Present the approach by phone to a group of county commissioners and staff from three counties (Todd, Wadena, Crow Wing and Cass)
- Important to present how the implementation experiences for Citizens League and FII are not static.

#### 4.23.14 (Organizing): Citizens League Organizing Agency

- Important reminder that individual tools (disciplines) cannot be isolated and be truly effective in the Civic Policy Making process. The analysis (evaluation) must always be present and all purposes must be linked.
- Discussion of how using Civic Policy Making and working from a power analysis (starting with a definition of the real state) changes the approach to a meeting agenda and how a meeting proceeds.
- Simplified policy process graphic for discussing organizing.

#### 4.26.13 (Evaluation): Conversation with Jorge Blandon at Family Independence Initiative

- Look at initiatives they are finding on Boston site and see how it aligns with developmental evaluation and civic organizing
- Payment structure has a supply and demand element to it. Think of it as responding to a demand for information, not a static amount. Right now \$600 per quarter is the maximum and \$450 per quarter is the average.

## May 2013

#### 5.7.13 (Organizing): Family Prosperity Civic Organizing Agency

- Greater recognition of how the work of all the organizing agencies is integrated.
- By applying civic disciplines, we do things in a different way that restructures existing resources.
- The measures (evaluation) track how this produces civic capacity in individuals and civic infrastructure via the connections with others who practice Civic Policy Making.
- If we are unable to pass legislation, we will need to adjust budget to compensate families who participate in the case that they lose public assistance due to their participation.
- Potential partners must agree to be part of a base of civic leaders that can be sustained.
- They will agree to define needs based on their experience and agree to implement solution strategies based on Civic Policy Making where they have the authority to act.
- They will agree to work in a cohort and practice Civic Policy Making, which includes evaluation based on evidence.

#### 5.16.13 (Organizing): MACI institute

- Putting the three over-arching measures for evaluation on meeting agendas has strengthened the discipline of public meeting agendas. 1.) Achieve particular goals. 2.) Achieve these goals using civic organizing disciplines. 3.) Practice timeliness by providing appropriate lead time for organizing key stakeholders.
- Members of the base share their individual evaluation of the 2012-2013 MACI work plan. 1.) What worked? 2.) What is the gap? 3.) What steps will you take to close the gap? Use this not only in evaluating your progress toward achieving goals, but also as you evaluate your role and the roles of others.

#### 5.22.13 (Organizing): Citizens League policy meeting

- Key question going forward for organizing Family Prosperity Demonstrations.
- How do we approach recruiting organizers that might be in paid positions? We don't want the money of the specific issue/expertise to supersede organizing.

#### 5.28.13 (Organizing): Meeting with Lance Hegland (Independence Partners)

- MACI is expanding into the disability community through Lance's work
- Meeting purpose is to cultivate the cross-sector base and tell each other what we are learning in our work.

#### 5.28.13 (Organizing): Citizens League Organizing Agency

- As civic organizers, we are responsible for the use, misuse, and non-use of power in our projects.
- Challenge related to project and using the disciplines to solve it.
- What is the challenge? Accurately representing civic organizing to funders in funding requests and reports. The fundamental framework must not be obscured by the specific policy concern (which is usually the focus of funders and formal policy makers).
- Why does it matter? Bridging the gap between what funders want to hear (their predetermined policy agendas) and an accurate portrayal of Citizens League work is essential to sustainability.
- How are you using disciplines to address the gap? Ongoing focus on governing document so that I am prepared to highlight (teach) at appropriate points in the process. Ensure that specifics from the power analysis guide the structure and content of reporting and requests.
- Lessons learned – rushing the timing leads to inaccuracies and wasted resources unless you stay focused on the civic process.

#### 5.30.13 (Family Groups): Leaders Partnering to End Poverty workshop

- Hold final workshop (Phase IV of the Pathways to Prosperity project) to make connection and begin relationship with 20-25 people in Staples-Motley area.

## June 2013

#### 6.4.13 (Organizing): Family Prosperity Civic Organizing Agency

- Focus on ensuring that civic organizing disciplines are in place and moving forward to establish the FPCOA.
- Discipline #1 – jurisdiction governing document approved
- Discipline #2 – civic leadership development (life work) to ensure integrity of process. Each member of FPCOA must evaluate their role against MACI criteria.
- Discipline #3 – power analysis has been established and will guide the development of the work plan. Fundraising strategy to support implementation with partners and family groups must come next before we can complete gap analysis (funding is part of the gap).

- Discipline #4 – work plan for next phase will be authored on completion of the power analysis.
- Power analysis updated to represent specific policies for expanding FPCOA.

#### 6.13.13 (Organizing): Working team meeting with Andrea Drewek

- Discussion of Andrea's role in the implementation and how it could connect to the Citizens League and the Minnesota Active Citizenship Initiative emerging leaders.

#### 6.13.13 (Family Groups): meeting with Jose Quinonez (Mission Asset Fund)

- Begin to assess the compatibility of offering lending circles as an option for family groups.
- Mission Asset Fund provides this option for FII families.

#### 6.14.13 (Evaluation): Meeting with Anna Kiel Martin

- Next questions for Jorge Blandon
- How much support from FII if we use their platform?
- What is the nature of the primary system and what data does it produce?
- Explore flexibility, customization and monitoring for the quality of data.
- More detail on how FII fills their liaison roles.
- Get better handle on determining the market mechanism for CCTs.

#### 6.25.13 (Organizing): Citizens League Organizing Agency (Civic Non-Profit)

- Strategic planning process for the MACI 2013-2014 work plan.
- Use one-pager on the purpose, criteria and steps to take to operate an organizing agency.
- Three bullets to define what we are proposing with Family Prosperity Demonstrations in this context.
- Use one-pager on Civic Policy Making for help in the educational track.

## July 2013

#### 7.2.13 (Organizing): Family Prosperity Civic Organizing Agency (FPCOA)

- Focus on civic imagination. It means that decision-makers have to imagine a different way to make policy than what they are currently doing. MACI represents three pilot demonstrations (business, faith and non-profit) and civic imagination really helps bring the faith aspect much closer to the business and non-profit perspective.
- To involve other organizations, the way to think in terms of traditional policy is that we are proposing to restructure service delivery in a fundamental way.
- Citizens League will take the lead and drive the agenda. From a funding perspective, the 15% administrative fee represents and supports a lead organizing role that is building civic infrastructure.
- We provide the infrastructure and method to innovate through a cross-sector base (business, non-profit, faith).

- Some terms are non-negotiable as Civic Policy Making requires a principled approach to policy. There are criteria for practice and the measures for evaluating practice. A willingness to practice these determines participation in FPCOA.
- Reminder that the educational track is mainly one-on-one meetings where organizers can practice in the process of addressing a defined problem/need.

#### 7.2.13 (Evaluation): Meeting with Anna Kiel Martin

- From an evaluation perspective, the output from this period of work will be a blend of adaptive systems dynamics and civic organizing. 1.) What? Represents the activities, the practice. 2.) So What? Represents the interpretation, the problem definition, the gap analysis. 3.) Now What? Represents the solution strategy which we produce with evidence from practicing Civic Policy Making.

#### 7.11.13 (Policy): Al Hester (St. Paul Public Housing Authority)

- Explore the rules regarding Section 8 housing and how participation in Family Prosperity Demonstrations could affect public assistance eligibility.
- We might want to explore whether Family Prosperity Demonstrations could be counted as training under existing federal regulations.

#### 7.17.13 (Organizing): Working team meeting with Stacey Millett

- Discussion of how Family Prosperity Demonstrations might link to existing work of foundations that focus in health and health care.

#### 7.23.13 (Organizing): Citizens League Organizing Agency

- Work plan and progress report
- Power analysis – identify gaps and what we are doing to close them.

#### 7.26.13 (Evaluation): Meet with Anna Kiel Martin

- Upcoming decision points on the type of evaluation and the time frame of the groups for phone call with Jorge Blandon.
- Prep for DHS meeting. Make sure they know how are approach is changing based on what we have learned in the last several months.

## August 2013

#### 8.1.13 (Evaluation): Conference call with FII (Jorge Blandon)

- Eight questions for Jorge on how data collection platform is designed and operates, including what we are looking for to be able to evaluate in real time.
- Resources in FII are allocated around what the families choose to do in their initiatives.
- Alignment with Civic Policy Making in that the resources would naturally be allocated to the organizing activities.

8.6.13 (Policy): Meet with MN Department of Commerce (John Harvanko)

- LIHEAP is administered to a Minnesotans that are 50% of state median income with about \$120 million in US Health and Human Services dollars. Probably will be lower \$\$ in 2014.
- Grants range from \$100 - \$1400 for about 140,000 households. CAP agencies are typical implementation partner.
- Can be dealt with administratively when we establish groups.

8.9.13 (Organizing): Working team meeting with Liz Anderson

- Follow up and pursue detail from Stacey Millett meeting. Support RWJ application through health research that link with Family Prosperity Groups.

8.23.13 (Evaluation): Meeting with Anna Kiel Martin

- Main difference between initial recruitment for us compared to FII is that we lead with Civic Policy Making, but since FII is not adhered to an existing approach to policy, there is no inherent conflict to work together.
- One family recruiting other families is the form that makes sense for both FII and Citizens League.
- Prepare email to Erin Sullivan Sutton at DHS on what we are looking to track and what they currently track for possible comparison data.

8.27.13 (Organizing): Citizens League Organizing Agency

- Civic non-profit work plan check-ins

8.27.13 (Evaluation): DHS meeting Asst. Commissioner Erin Sullivan Sutton and Mark Toogood

- Lay groundwork for counter factual families
- Discover common ground in interest of pilot progress

8.28.13 (Organizing): Citizens League policy meeting

- Trying to control the outcomes of work through existing approaches to policy making are what gets us in trouble when we are trying to lead organizing. You must follow the process and be open about the outcomes.
- As a tool when evaluating in the public meeting discipline, ask everyone at the end to answer the question, "Does this meeting cause you to change you role or think differently about your role?"

## September 2013

9.4.13 (Evaluation): Call with Anna Martin and Jorge Blandon (FII)

- The liaison experience of FII is that it takes about six months to establish baseline.

- The Citizens League would view this as an organizer role, although many decisions about how capturing data best works with family leaders, agency people etc. would have to be worked out in the future by the FPCOA as we begin building the infrastructure.
- An FII liaison currently works with about 100 families (in SF) and what they look for is an analyst perspective in the liaison.
- Citizens League through FPCOA will have to decide if we want an evaluator/analyst function that is grounded in Civic Policy Making and then have initial family in an organizer role and compensated through the CCT structure.

#### 9.11.13 (Organizing): Discussion with Peg Michels about FII potential visit

- What we can we do to move forward in exploring possible use of FII data collection platform? Main points are: 1.) data platform that we can add our labels and categories to over time to track Civic Policy Making outcomes. 2.) No menu that we are committed to or locked into. 3.) Collects basic indicators of where people are at for a baseline (earnings, assets, public assistance etc.)
- FPCOA must have agreement on data collection before any decisions are made.
- At this point in time, everything is still possible.
- FPCOA will reconvene when next phase of project is funded, decision must go through Citizens League.

#### 9.12.13 (Organizing): Meet with Sean Kershaw and Annie Levenson-Falk about FII potential visit

- Agreement on validity of FII visit as long as “everything remains possible” and decision making is handled through civic non-profit (Citizens League) or other appropriate part of civic infrastructure that is part of MACI.
- Amount of collaboration with FII will depend on their interest and participation in Civic Policy Making.

#### 9.20.13 (Evaluation): Meeting with Anna Kiel Martin

- Prepare for 10/3 visit from FII.
- We are searching for data collection that will suit the Family Prosperity Groups and Civic Policy Making.
- It is our role to attempt to increase the capacity of FII and let them know how we will be organizing our work.
- Civic Policy Making means that we offer them the policy structure to move forward with a principled course of action that builds an infrastructure to sustain the effort.

## October 2013

#### 10.3.13 (Evaluation): Jorge Blandon from Family Independence Initiative (FII) visits Minnesota

- Visit and share information with MIWRC
- Visit and share information with PPL
- Visit and share information with CAPRW

- Showcase on-line journal and data capture system
- Evening event to present the need for policy change and the possibility of FII and Citizens League work together

#### 10.11.13 (Organizing): Working team meeting regarding funding options

- Who are the funders who might resonate and be open to supporting the organizing work directly?
- Most funders want to support service delivery or other existing approach to policy.
- We have to be up front about getting them to support organizing function because we won't do it otherwise.
- Agreement on funders to take a closer look at.

## November 2013

#### 11.1.13 (Evaluation): Meeting with Anna Kiel Martin

- Plans for reporting about the work – timeline, evaluation, graphic of organizing relationships, etc.
- Connections to move forward with some of the funder ideas.

#### 11.5.13 (Organizing): Working team meeting with Stacey Millett

- Further work and refinement of health funding connection to Family Prosperity Demonstrations

#### 11.25.13 (Organizing): Working team - Stacey Millett and potential funder

- Stacy connects work to small private foundation. The idea being that these are the type of funders who could be most open to funding organizing and Family Prosperity Demonstrations, which are a radical approach compared to the service delivery that many funders support.

# So What?

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## The Evolution of Key Ideas

### *Integration of and Immersion in Civic Policy Making*

Communicating and enacting the civic organizing approach and primary purpose as demonstrated through a focus on public assistance policy is a nuanced and difficult proposition. The tendency is to enact a side-by-side approach, instead of both/and. Project lead Bob DeBoer spends time grounding himself in the civic organizing approach through membership in multiple

organizing agencies and scrupulously communicates with potential partners and recruited working group members about the approach. Lastly, he models and helps others participate in the approach through meeting protocol and decision-making processes. All of these actions have contributed to the on-going cohesion of the Family Prosperity pilot as a true demonstration of the civic policy making approach.

During the pilot planning process several questions have arisen as to the role and integration of civic policy making into an adapted FII model. For example, who should have membership on the organizing agency? Should participation in pilot governance be a requirement for partner organizations? Or, How do we model and educate families, partner agency staff and consultants in the civic policy making approach? How do we establish a level of governance that is accountable and sustainable?

Cross-walking the role of the organizer to specific persons/roles within the existing service-delivery infrastructure in which this pilot is arising has been challenging. There is the matter of education in civic policy making so that one can make an informed decision of participation. Throughout the year this has been suggested to take shape as a four-part workshop or more simply one-on-one conversations with Bob DeBoer. A key question is who can/will take on the role of organizer as the pilot educates organizational partners and family group participants in civic policy making.

For partner organizations, several iterations of requirements or profiles have been posited during 2013. The concept of “work with the willing” has been a constant—the pilot is seeking people who share the fundamental belief that a new approach to policy making is needed. The matter of authority within the partner agency (having a true capacity to influence within one’s own organization) has been prominent. We have articulated, *“They need to have primary governing authority within their institution because their role will be to restructure existing institutional policies based on insights and findings from the independent family demonstrations.”* Lastly, the time commitment of a partner organization staff person has been made explicit due to expectations of participation in the organizing agency and practice of civic organizing disciplines. The answer for organizational partners to “Who will take on the role of organizer?” will hopefully emerge naturally from within each organization and within the parameters discussed above.

The principles of civic policy making hold space for the education, inclusion and participation of family members who are involved in the family group work. In fact, if the pilot is primarily a demonstration of the civic organizing approach to policy making then family members become equal participants with innate capacity and the obligation of a citizen to act toward more just policy making. How then to embody and live this principle? Educating in the civic policy making approach is one answer. Opportunity to self-select and serve on the organizing agency is another answer. This remains an active question as the pilot moves closer to implementation.

Finally, civic policy making is the defining feature of the pilot in Minnesota. It is what distinguishes this work from the Family Independence Initiative (FII) through which we are exploring specific

practices. A policy development process based on civic policy making produced a major set of analysis and conclusions during 2010. This working document led to state-wide workshops in 2011-2012, the legislative sanctioning and support of the pilot, and the governance of the pilot through an organizing agency. All of these steps are unique to the work here in Minnesota. FII remains an inspiring model, thought-leader and possible partner, but civic policy making offers an opportunity for Minnesota and this pilot to substantively add to the conversation and take a leadership role.

### *Recruitment and Eligibility of Participating Families*

As the working group has become increasingly steeped in civic policy making, our sensitivity to power dynamics, the allure of the service-delivery model and true adherence to the stated principle “we believe in human capacity,” have challenged our thinking and approach to the recruitment and eligibility of families.

At first, the idea was that partner organizations were going to recruit families from within their service-delivery programs. A staff person from the partner organization would be involved with the family groups. We also explored whether we ought to define a minimum level of “stability” required for a family to participate. And originally, we were unclear what participation entailed and how formal an agreement was necessary with each family.

The FII approach suggests that existing social capital between families within a family group is important. FII utilizes the families themselves to recruit and sign-on a complete “family group” of 5-10 families. As a result, it would seem that the partner organization’s role is best used as an access point to potential families, not as a recruiter and former of groups. In this way the pilot can work more naturally within existing systems of social capital and mutual support, building from what is working as opposed to mirroring a service-delivery approach.

Likewise, the service-delivery approach looms large with the prospect of using a staff person from the partner organization as the organizer or liaison connected with a family group. As our thinking has evolved it seems less and less likely that a staff person will assume such a role. Avoiding power differentials that may influence behavior and dampen capacity building within the family group is a priority. From a working document this year: *Realization that the institutions can be more of a conduit to groups of families and that it isn’t necessary to over-structure the approach. As long as we have the liaison role that simply collects information links to the institution and the pilot, the organizer can just as easily be from the families themselves or some other intermediary that is able to focus specifically on civic organizing.*

Eligibility of a particular family has been a topic of much discussion. The pilot ultimately seeks to change public assistance policy; dually accomplishing better policy and efficacy of the civic policy making approach. If public assistance is at the heart of the pilot, then should all participating families qualify for some form of public assistance? This would be a departure from the FII model,

which does not specify and largely targets families living just above this income threshold. And yet, it is recognized that a family experiencing crisis may not find value or success through participation in the pilot. Again, FII models that it is the family's decision and determination regarding their own stability and ability to participate which matters. The Family Prosperity Civic Organizing Agency (FPCOA) has not yet answered these questions for itself.

A level of formality and long-term agreement to participation is something where FPCOA could explore the FII use of "contracts" with each participating family. Our pilot will be a three-year model in accordance with civic policy making timelines. The current thinking is that participating families would sign a contract agreeing to information sharing for this time period in exchange for technology (likely a laptop), monthly meeting space and other yet-to-be-determined social network assets. The details of this contractual agreement remain to be finalized.

### *Role of Data*

Initially, family participation in some sort of on-going database recording was viewed as a way of tracking key indicators of progress and as a data source for determining conditional cash transfers. This thinking has been transformed throughout the year to view data collection and transparency as a primary activity and change agent. As we seek to shift from proving neediness to developing capacity and from service-delivery to civic policy making, data collection also shifts from an evaluative activity to a learning and discovery activity that catalyzes positive action and change.

The pilot, through consideration of the FII experience, has examined the power dynamics inherent in areas such as:

- pre-determining goals,
- what "matters" for cash transfers, and
- the specifics of inquiry for data collection.

Civic policy making asserts that participating families have innate capacity, making it inappropriate for pilot organizers to pre-determine what is important for each family and what should or should not be rewarded via monetary incentives. Civic organizing requires a sort of co-creation and equity to keep the effort from sliding into existing approaches to policy making that can create barriers to governing and capacity building. As the process of data collection itself is unpacked, the potential for supporting positive change directly through the data collection process itself becomes apparent—reflection on one's situation through taking time to record data avails the family of important time-lapse and large-picture views of itself that facilitate good decision-making toward self-determined goals.

Embodying these values with regard to data collection poses a few challenges; collection, evaluation indicators, and cash transfer methodology. FII offers the MN pilot a solution for collection via an on-line data collection journaling method that is flexible, interactive and

transparent. The on-line journaling meets the needs of the family for access to their own data and to influence collected data points to best mirror what is important. It also meets the needs of the pilot for aggregate level data in the service of policy-making. The issue of no pre-set evaluation indicators will be addressed through the Developmental Evaluation framework the pilot has adopted (see next section). Cash-transfers, as an alternative idea to current public assistance, remain a grey area for implementation.

Data, the details of participating family's lives, is a key activity and a primary point of connection between the family groups and the pilot as a whole. This connection can be made explicit through the back end of a database. The pilot has touched on several potential methods; an organizer, a family group facilitator and a family group liaison. The FII experience has informed our thinking toward a family group liaison role that could support, capture, and, most importantly, not disrupt the information produced by civic organizing. This liaison:

- serves as a touch point with the family groups,
- helps to surface stories and context for deeper learning and policy influence, and
- audits reports to increase the validity of the data collected.

Where this role fits within the Civic Policy Making infrastructure would be a question for the Family Prosperity Civic Organizing Agency.

### *Evaluation Framework and Methods*

In November of 2012, pilot lead Bob DeBoer recognized the need to build evaluation thoughtfully and intentionally into the pilot from the beginning. The first iteration of an evaluation plan involved a traditional lens with a process evaluation of the civic policy making approach and an outcome evaluation aimed at case making to influence future policy. As the evaluator became familiar with Civic Policy Making and the adaptive and emerging nature of pilot planning and implementation, a Developmental Evaluation approach became a clear fit.

Taking into account the civic policy making framework of “case studies” and commitment to on-going evaluation to support practice of civic policy making, as well as the emergent nature of the data collection from families, the pilot evaluation demands flexibility and a centering around principles in ways that more traditional frameworks are not equipped to do. Developmental Evaluation will help facilitate reflective practice around the question: *Do our actions reflect our principles?* It will put resources toward watching for and capturing the unexpected to deepen pilot learning and inform practical policy making.

Data will also be collected that applies to more traditional public assistance outcomes and will run along-side the Developmental Evaluation in order to attend to the need for credibility with a legislative audience. This will involve a counter-factual comparison group from the MN Department of Human Services, as well as a potential counter-factual through the FII approach without civic policy making.

The evaluator will be a member of the pilot's organizing agency in demonstration of the civic policy making approach. Through the pilot, the evaluator's role will be to:

- Document the processes, decisions, adaptation and results
- Facilitate ongoing, real-time, decision-making that is based in data
- Watch for and track the “unanticipated” consequences as the pilot unfolds

## Now What?

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### *Pilot Launch and Timeline*

The pilot will begin with the receipt of enough money (possibly \$100,000) to commit to one family group as there is no requirement that all family groups start at the same time. The first group to begin will be organized through the Islamic Civic Society of America. As funding is available for other groups, they will begin. Each group will run for a period of three years. January 2014, the on-line journal system developed by FII will be available for purchase. The Family Prosperity Civic Organizing Agency will make the final determination on selection of this tool for the pilot. A report to the Minnesota Legislature is required in 2016.

### *Funding*

The Minnesota Active Citizenship Initiative (MACI) is working throughout its base to find state and national funders who have capacity and interest in funding the organizing function of Civic Policy Making. For this particular project, two primary proposals that link to specific policy problems are most likely: one using the social determinants of health as a framework, and one using a poverty reduction framework. The projected three-year budget for six family groups across Minnesota that implements Civic Policy Making is \$1.34 million. This budget will be revisited when the FPCOA resumes.

### *Education Strategy for Civic Policy Making*

As discussed above, this is still a matter for consideration. Once funding is secured, how and who to orient to Civic Policy Making, and within what timeframe, will arise as key decisions—even if only one family group begins initially.

### *Evaluation Next Steps*

Once funding is secured a specific data collection methodology within the framework of a multi-case study design should be selected and an overall evaluation strategy outlined. This will identify

and include data sources in addition to the on-line family journals, as well as provide structure for on-going reflection of key stakeholders and a documentation and reporting rubric. Without a distinct timeline of start dates and how many family groups it is difficult to finalize this type of planning.

Additionally, recruitment and training of a formal liaison to perform data verification and story probing with each family group will be necessary. Re-engagement with MN Department of Human Services will also be necessary regarding whether a counterfactual cohort can occur when at least one family group has begun.

### *Possible Partnership with Family Independence Initiative (FII)*

FII's visit in October 2013 provided a welcome touch point to involved partner organizations and re-energized key stakeholders around the pilot activities. The visit also illuminated further alignment between FII and the Family Prosperity Pilot. How to move forward in strategic relationship with FII is an important question for the pilot. This question embodies not only the specifics of the relationship, but also issues of governance, decision-making authority and logistics of demonstrating civic policy making. Currently, the pilot is experiencing tension between the pressures and realities of implementation and the operation and demonstration of Civic Policy Making. Exploring and learning to navigate this tension is an excellent opportunity to revisit pilot principles and practice the disciplines required by Civic Policy Making. It is this type of tension from which others can learn as the pilot seeks to be a true demonstration.

#### **2016 Update**

Since funding from the legislature was not requested, launching the actual demonstrations was contingent on the Citizens League being able to raise funds to support the three-year demonstrations as outlined in this report. Unfortunately, funding was not secured and therefore the demonstrations were not launched.

This report (with timeline and evaluation) documented the progress including the passage of the legislation and the six months of effort afterwards. Until the Citizens League can secure funding for the demonstrations, we do not have any outcomes to report at this time.

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