



Expect More Arizona – Advocacy Evaluation Final Report

June 2018



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Expect More Arizona June 2018

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Executive Summary

Purpose of the Study

Expect More Arizona (EMA) is an advocacy organization that champions a world class education from the early years through career for every child. Together with a growing network of partners and individuals across the state, Expect More Arizona (EMA) staff work to build an “education first” culture and create opportunities to support students and educators at the local, regional, and state levels in Arizona. The aim of this evaluation was to identify ways in which the efforts of EMA contribute to the long-term goal of building will in the public to support education in Arizona. The endeavors of EMA are intended to add value to the work of EMA’s partners and others focused on this same long-term goal. The evaluators worked with EMA leadership and staff to identify a select set of strategies and activities as the focus of the study. The primary focus was on the effects of the advocacy efforts – outcomes or impacts. In addition, the evaluation focused on the outcomes in order to understand influence and causes. The results of the evaluation process can:

- Inform how select strategies are developed and implemented; and
- Identify how the efforts of EMA contribute to the outcomes of interest.

The research questions were developed with EMA leadership in order to promote utilization of the evaluation results. They were based on select EMA strategies and were as follows:

- How effective is EMA at increasing awareness of EMA’s key issues for select priority audiences (communicator/support for Arizona Education Progress Meter)?
- How effective is EMA at convening and engaging partners to influence community efforts and thought leadership at the state and local levels (convener/shared messaging and alignment of purpose)?
- How effective is EMA at moving individuals and partners to take action to advance EMA’s short and long-term advocacy priorities (action on policy)?

Methods

The primary approach for this study is the application of Contribution Analysis¹ which consists of six key steps:

Step 1 - Set out the cause-effect issue to be addressed (EMA strategy area of focus);

Step 2 - Develop the postulated theory of change (ToC) and risks to it, including other influencing factors;

¹ Mayne (2011) ‘Contribution Analysis: Addressing Cause and Effect’, in R. Schwartz, K. Forss and M. Marra (eds), *Evaluating the Complex*, New Brunswick NJ: Transaction Publishers: 53–96



Step 3 - Gather the existing evidence on the ToC;

Step 4 - Assemble and assess the contribution claim, and challenges to it;

Step 5 - Gather new evidence from the implementation of the strategy;

Step 6 - Revise and strengthen the contribution story.

Analysis of data collected through this six-step process is done in order to build an argument that the EMA strategy contributed to an intended outcome.

Stakeholder Interviews and Secondary Data Analyses

The evaluation team worked collaboratively with EMA staff to identify key stakeholders across the state of Arizona. A total of N=45 people were randomly selected and interviewed over two rounds of telephone interviewing. Documents illustrating EMA planning and organizational functioning were also reviewed. EMA staff also participated in theory of change model design and review of results through work sessions with the evaluators throughout the process.

Findings

EMA Theory of Change Model

Evaluation staff held work sessions with select Expect More Arizona (EMA) staff members to develop and refine a theory of change model. In this Contribution Analysis evaluation approach, the development of a postulated theory of change for the intervention being examined is a first step done with program staff and/or key stakeholders. This theory of change model is tested against logic and the evidence available from results observed and the various assumptions behind the theory of change and considers other influencing factors. The analysis either confirms - verifies - the postulated theory of change or suggests revisions in the theory where the reality appears otherwise. The overall aim is to reduce uncertainty about the contribution an intervention is making to observed results through an increased understanding of why results did or did not occur and the roles played by the intervention and other influencing factors.

The results of the interviewing process and work with EMA staff indicate a very good alignment between the proposed theory of change developed by EMA staff / leadership and evidence from the stakeholder interviews. This is a significant finding in arguing for how the efforts of EMA contributes to an intended outcome. The following Exhibit illustrates this theory of change. It identifies the outcomes EMA has set along with the assumptions that must be met in order for EMA to claim influence on those outcomes.



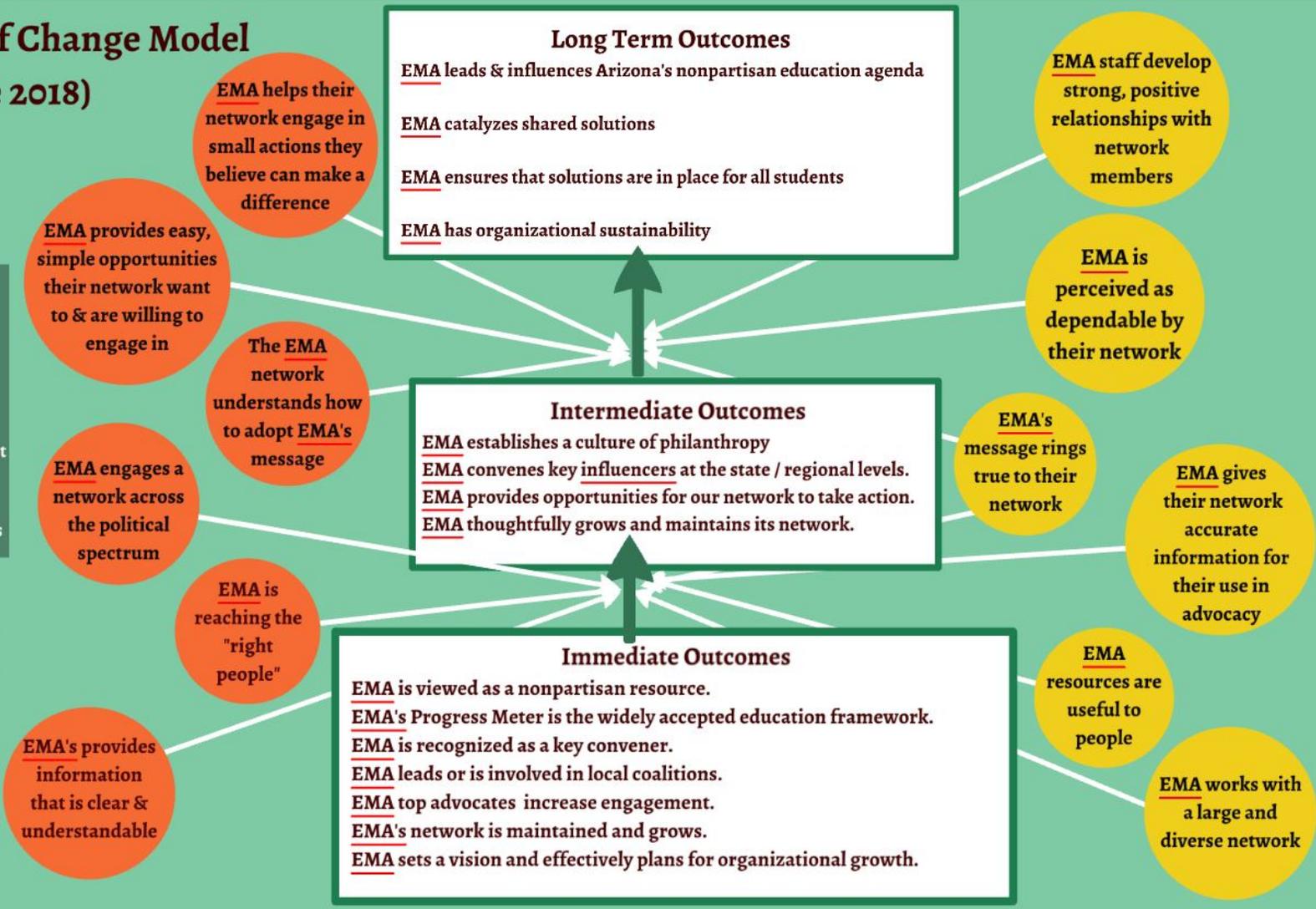
EMA: Theory of Change Model

(June 2018)

- Outputs/Activities**
- Mobilizing Network - Calls to Action
 - Thought Leadership - Education
 - Media Engagement
 - Community Engagement
 - Convening Activities
 - Establishing / Cultivating Partnerships

Assumptions to Meet:

- Critical, Must be Met
- Important to be Met



Increasing Awareness

The majority of respondents view EMA as very effective at increasing public awareness on key education issues. Results of the interviewing indicate that the majority of respondents find that:

- EMA is a trusted resource
- Information shared is valued by EMA partners.
- Non-partisan nature of communications is highly valued.
- Some indication of more need for awareness building on how to use Arizona Education Progress Meter for creating change.

Convening

Results indicate significant evidence for EMA's success as an effective convener. In particular respondents noted:

- Various, effective types of convening activities conducted by EMA at both the local and state levels to influence education policy / programming.
- Outreach supported by EMA was recognized as effective.
- A need to better engage more rural parts of the state.
- A need to better engage more ideologically diverse stakeholders.

Influencing Action

Results also indicate that EMA is able to impact and influence action – particularly through being a trusted information source.

- Credit was given to EMA by respondents for high levels of impact attributed to development and application of the Arizona Education Progress Meter as an advocacy and policy-making tool.
- While acknowledged as effective in influencing action, less evidence was provided for moving groups / individuals from information sharing to action.
- Respondents encouraged EMA to expand outreach efforts to more diverse groups and provide more direct assistance to those groups to take action.

Key Considerations

As a result of these findings, the following considerations are presented that may enable EMA to improve on the way it contributes to policy change.

- EMA's organizational Theory of Change – the beliefs and approaches used in conducting advocacy work – are very much aligned with stakeholder views what makes EMA effective. A significant finding that can be further supported by EMA better documenting and communicating about how it facilitated change through advocacy.



The assertion is that if EMA better communicates how it facilitated change then stakeholders may have more awareness of EMA's influence and stance on issues.

- EMA is encouraged to not “play it too safe” in advocacy work – many stakeholders indicating a desire for EMA to be more aggressive in pushing for change.
- EMA is encouraged to expand its engagement to more rural areas of the state. In addition, to expand engagement to other advocacy and policy making groups that may have different positions. Find ways to engage more diverse stakeholders.
- EMA is encouraged to engage and convene more diverse partners. Specially to engage interested parties in the rural areas of the state. As well as engaging those with different policy view-points on how to improve education. Many respondents commented on the need for EMA not to be too focused in any one geographic area or just on a few interest groups.
- Based on the results of this study, EMA can now clearly identify and measure a set of unique key performance indicators to better track both internal and external factors that influence EMA's strategic long-term outcomes. This is important information that can help EMA with planning and enable EMA to be uniquely accountable to stakeholders and funders.



Introduction

Aims of the Study

Expect More Arizona² is an advocacy organization that champions a world class education from the early years through career for every child. Together with a growing network of partners and individuals across the state, Expect More Arizona (EMA) staff work to build an “education first” culture and create opportunities for more support to students and educators at the local, regional, and state levels in Arizona.

The work of “advocacy” organizations is acknowledged as complex and involving multiple strategies and activities. The work of advocacy organizations is very different from organizations that provide services or model social innovations. As described by Teles and Schmitt (2011),³ advocacy work is subtler and more uncertain, less linear, and it is often fundamentally about influencing governmental policy. The results of advocacy work depend on the outcomes of fights in which good ideas and sound evidence don’t always prevail. Additionally, advocacy work often involves the work of a number of organizations. Given the complex nature of advocacy organizations, this evaluation focused often on identifying examples of contribution rather than attribution. By this we mean that in responding to research questions about whether or not the actions of EMA caused a specific change or advocacy goal to be met, this evaluation design acknowledges that advocacy work involves complex systems where a variety of factors and variables interact dynamically within the interconnected and open part of the system⁴. This design was guided by identifying likely influences or contributions instead of trying to render a simple cause-effect conclusion. Often evaluation designs rely on counterfactual analysis to “associate” or attribute a cause to a given effect, but that alone does not explain how the effect came about. Other approaches examine how regularly a cause and effect are associated. However, this approach is problematic in that it can be difficult to clearly identify when there is an association between factors, which factor is the cause, and which is the effect. These approaches do not adequately address situations where there are complex “interventions” aimed at achieving complex outcomes.

We believe that to evaluate the work of advocacy type organizations, it is necessary to use approaches that allow for describing the mechanisms thought to be functioning in that context that are generating change, and the resulting intended and unintended outcomes. This type of evaluation design involves very specific identification of the organization’s “theory of change,” the steps that occur between any set of deliberative actions and subsequently observed changes, and the assumptions relied on for the steps to occur. The assumptions are the events and

² For more information about Expect More Arizona, see: <https://www.expectmorearizona.org/>

³ Teles, S. and Schmitt, M. (2011) *The Elusive Craft of Evaluating Advocacy*, published and supported by the William and Flora Hewlett Foundation.

⁴ Patton, M.Q. (2008) *Advocacy Impact Evaluation*, *Journal of Multi-Disciplinary Evaluation*, vol. 5, no. 9, March 2008.



conditions that need to occur, according to the organization’s theory of change model, if the causal link is to be realized. This evaluation approach utilized contribution analysis⁵ and other methods in order to verify or confirm with empirical evidence that the “theory of change” posited for a select strategic area – that is, to verify that the steps and assumptions in the intervention “theory of change” - were realized in practice and account for other major influencing factors. Then it is reasonable to conclude that the select strategic intervention of EMA has made a difference or, in other words, was a contributory cause for the outcome.

Research Questions

The aim of this evaluation design was to identify ways in which the efforts of EMA contribute to the long-term goal of building will in the public to support education in Arizona. The endeavors of EMA are intended to add value to the work of EMA’s partners and others focused on this same long-term goal. Working with EMA leadership, we identified a select set of strategies and activities as the focus of the study. We were primarily focused on the effects of the advocacy efforts – outcomes or impacts. In addition, we were evaluating the outcomes in order to understand influence and causes. The results of the evaluation process can:

- Inform how select strategies are developed and implemented; and
- Identify how the efforts of EMA contribute to the outcomes of interest.

The research questions were developed with EMA leadership in order to promote utilization of the evaluation results. They were based on select EMA strategies and were as follows:

- How effective is EMA at increasing awareness of EMA’s key issues for select priority audiences (communicator/support for Arizona Education Arizona Education Progress Meter)?
- How effective is EMA at convening and engaging partners to influence community efforts and thought leadership at the state and local levels (convener/shared messaging and alignment of purpose)? and
- How effective is EMA at moving individuals and partners to take action to advance EMA’s short and long-term advocacy priorities (action on policy)?

⁵ Mayne (2011) ‘Contribution Analysis: Addressing Cause and Effect’, in R. Schwartz, K. Forss and M. Marra (eds), *Evaluating the Complex*, New Brunswick NJ: Transaction Publishers: 53–96



Methodology and Results

Evaluation Design

The primary approach for this study is the application of Contribution Analysis which consists of six key steps:

Step 1 - Set out the cause-effect issue to be addressed (EMA strategy area of focus):

- Acknowledge the causal problem for the intervention/strategy in question;
- Scope the problem: determine the specific causal question being addressed/determine the level of confidence needed in answering the question;
- Explore the nature and extent of the contribution expected from the intervention;
- Determine the other key factors that might influence the realization of the results; and
- Assess the plausibility of the expected contribution given the intervention size and reach.

Step 2 - Develop the postulated theory of change (ToC) and risks to it, including other influencing factors:

- From strategy area documents, interviews and relevant prior research, develop the postulated ToC of the strategy, including identifying the assumptions and risks for the causal links in the ToC;
- Identify the roles other key influencing factors may play in the ToC; and
- Determine how contested the postulated ToC is to better understand the strength of evidence needed.

Step 3 - Gather the existing evidence on the ToC:

- Gather the evidence that exists from previous measurement, past evaluations and relevant research to assess the likelihood: (1) of the expected results, assumptions and risk being realized; (2) of each of the causal links in the results chain occurring; and (3) of the other influencing factors making a significant difference.

Step 4 - Assemble and assess the contribution claim, and challenges to it:

- Set out the contribution 'story' on the likelihood that the strategy "worked": the causal claim based on the analysis of logic and evidence so far;
- Assess the strengths and weaknesses in the postulated ToC in light of the available evidence, and the relevance of the other influencing factors - which links seem reasonable and which look weak and need more evidence; and
- If needed, refine or update the ToC.



Step 5 - Gather new evidence from the implementation of the strategy:

- With a focus on the identified weaknesses, gather data on the ToC results that occurred, the assumptions and risks associated with the causal links and the other identified influencing factors.

Step 6 - Revise and strengthen the contribution story:

- Build a more credible contribution claim based on the new data gathered;
- Reassess its strengths and weaknesses, i.e., the extent to which the results, assumptions/risks and other influencing factors occurred;
- Conclude on the strength of the ToC and the role played by other influencing factors, and hence on the contribution claim; and
- If the evidence is still weak, revisit Step 5.

Analysis of data collected through this six-step process is done in order to build an argument that the EMA strategy contributed is based on certain conditions:

1. Plausibility - The strategy is based on a reasoned ToC: the chain of results and the assumptions behind why the strategy is expected to work are plausible, sound, informed by existing research and literature, and supported by key stakeholders;
2. Fidelity - The activities of the strategy were implemented as outlined in the ToC;
3. A verified ToC - The ToC is verified by evidence: the chain of expected results occurred, and the causal assumptions held; and
4. Accounting for other influencing factors - Context and other factors influencing the strategy is assessed and are either shown not to have made a significant contribution or, if they did, their relative contribution is recognized and included in the ToC as part of a larger causal package that the ToC captures as faithfully as possible.



Instruments and Measures

The specific methods and measures used for this evaluation are shown in Exhibit 1. Data collection protocols are provided in the Appendix.

Exhibit 1. Data Collected, Purpose, and Analysis Methods

Research Question	Data Collection Methods or Tools	Source of Data	Sampling Strategy
How effective is EMA at increasing awareness of EMA's key issues for select priority audiences?	(1) Construct with EMA staff / key stakeholders a 'theory of change' model for the strategic area of focus. (2) Conduct key informant interviews.	- EMA Staff members - Key external partners / stakeholders; Members of groups that EMA regularly convenes.	EMA staff members selected based on level of involvement in each strategic area of focus. External stakeholders from key partner / other external groups to EMA associated with the select strategy.
How effective is EMA at convening and engaging partners to influence community efforts and thought leadership at the state and local levels?	(3) Content analysis of documents, etc. (4) Finalize contribution analyses.	- EMA records / documents / reports	EMA Convened Group Members: purposive selection of respondents from each Group identified as most likely to be involved in contributions to the strategic area of focus.
How effective is EMA at moving individuals and partners to take action to advance EMA's short and long-term advocacy priorities (action on policy)?			



Developing the Theory of Change (ToC) Model

Evaluation staff held work sessions with select Expect More Arizona (EMA) staff members to develop and refine a theory of change model. In this Contribution Analysis evaluation approach, the development of a postulated theory of change for the intervention being examined is a first step done with program staff and/or key stakeholders. This theory of change model is tested against logic and the evidence available from results observed and the various assumptions behind the theory of change and considers other influencing factors. The analysis either confirms – verifies – the postulated theory of change or suggests revisions in the theory where the reality appears otherwise. The overall aim is to reduce uncertainty about the contribution an intervention is making to observed results through an increased understanding of why results did or did not occur and the roles played by the intervention and other influencing factors.

Methods to Construct the Theory of Change Model

The process the evaluators used to construct a Theory of Change model with EMA staff was as follows:

1. Identify EMA staff and other key stakeholders who have the best knowledge and experience concerning the advocacy area of focus.
2. Schedule a Theory of Change “mapping session” – a first group work session to identify:
 - a. A basic results chain showing the logic of EMA actions and expected impacts (see Exhibit 2 on next page);
 - b. The underlying assumptions behind the links in the results chain;
 - c. An elaboration of the risks to each of these links;
 - d. Identification of unintended effects; and
 - e. Identification of other key explanatory factors (rival explanations).
3. LMA staff took notes from this session and then developed a draft results map.
4. EMA then identified key stakeholders beyond staff members who might be interviewed, key stakeholders having these characteristics:
 - a. Recent knowledge of and/or involvement in the EMA advocacy area of focus;
 - b. Are representative of the types of individuals/groups that EMA usually engages in their work;
 - c. Are expected to be willing to participate in one and perhaps two telephone interviews; and are willing to review notes from the interview(s) as a validity check.
5. LMA evaluation staff interviewed these external stakeholders and collected relevant EMA administrative data.
6. Analyze data and schedule second work session to present findings to EMA staff workgroup. These findings are partly illustrated in a new, revised Theory of Change map.

Results Chain

Long Term Outcomes:

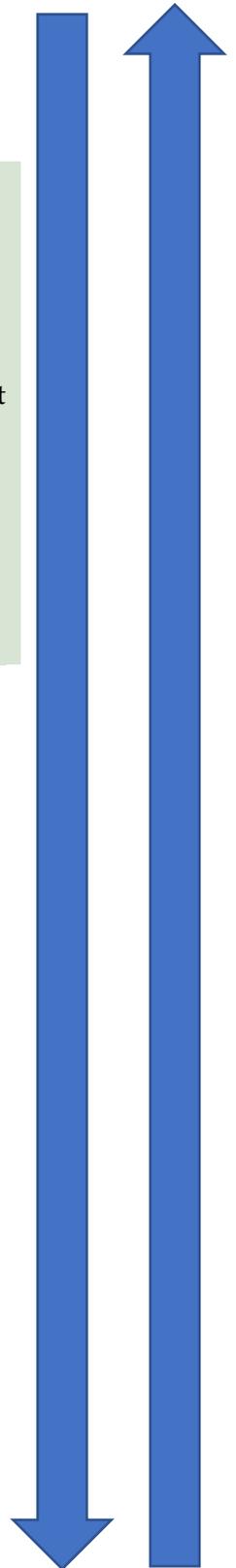
- EMA leads and influences Arizona’s nonpartisan education agenda
- EMA catalyzes shared solutions
- EMA ensures that shared solutions are in place for all students.
- EMA has organizational sustainability

Immediate / Interim Impact:

- EMA is viewed as a nonpartisan resource to policymakers, key influencers, media, and business leaders
- The Arizona Education Arizona Education Progress Meter is the accepted education framework
- EMA is recognized as a key convener on education issues at all levels
- EMA creates coalition(s) that inform and advance policies and funding to meet the Arizona Education Arizona Education Progress Meter goals
- EMA leads or is a part of local convenings that create space for shared action
- EMA top advocates increase engagement
- EMA’s network is maintained and grows
- EMA establishes a culture of philanthropy
- EMA sets a vision and plan for organizational growth

Outputs:

- Number and % of stakeholders who view EMA as a trusted resource
- Number and % of partners who believe the Arizona Education Progress Meter is the widely accepted education framework
- Number and % of stakeholders who believe EMA is leading the state’s education agenda
- Number and % of stakeholders who believe that EMA is influencing Arizona’s education agenda
- Counts - Evidence of Usage of Arizona Education Progress Meter and Actions taken
- Counts - Evidence of Usage of Vote 4 Education content / materials
- Counts - Number of Partners and status
- Number of convenings EMA influences
- Number of counties reached
- Number of media mentions
- Number of desk side interviews
- Number of Advocates / Number of Advocates donating
- Number of Spokespeople
- Size of network - Number of People on Advocacy List
- Revenues and Expenditures
- Diversity of Funding
- Renewals
- New Funding



The following were the objectives of the first work session facilitated by evaluation staff with EMA staff:

1. To identify the advocacy area of focus and the Activities and Outputs;
2. To identify the most critical Immediate/Interim Impacts;
3. To identify the most critical Assumptions – how do the Activities and Outputs expect to result in or effect the Immediate/Interim and then longer-term impacts? What has to happen? What contextual factors influence these processes?
4. To identify the Risks – What are the risks to the link not occurring? Possible external events and or conditions that could result in not meeting an assumption; and
5. To identify the most critical External Factors to consider? These are issues related to the context of the work and or potential rival explanations already known.

EMA staff were asked to consider a draft results chain, see Exhibit 2 above, that was developed from a review of EMA’s strategic planning documents. In the work session staff were given worksheets designed to collect data from them in response to the objectives listed above. The worksheets are provided in the Appendix. The results from this work session then were used by evaluation staff to develop a draft Theory of Change model with key assumptions focused on the contributions that EMA staff believed the efforts of their work made towards select outcomes. The primary outcome areas of focus for the first work session were:

- EMA staff are effective at leveraging various advocacy efforts towards common goals;
- EMA staff are effective at raising awareness about the need for educational reform, the importance of education;
- EMA staff are effective at building support for educational reform and the use of the Arizona Education Arizona Education Progress Meter in advocacy efforts; and
- EMA staff are effective at convening partners, individuals, organizations to take action.

After this first work session, evaluation staff conducted a series of stakeholder interviews. In addition, evaluation staff reviewed EMA materials related to their work plans. The data collected was analyzed in part to identify how much evidence there was for each of the assumptions that EMA staff identified as critical from the first work session. More detail about the first round of interviews and the approach to analysis is presented in the following section of the report.

First Round of Key Stakeholder Interviewing

Sample Selection

The first round of interviewing was focused on asking questions of key stakeholders that were focused on the following EMA outcome areas:

- EMA staff are effective at leveraging various advocacy efforts towards common goals;
- EMA staff are effective at raising awareness about critical education issues;
- EMA staff are effective at building support for education and the use of the Arizona Education Arizona Education Progress Meter in advocacy efforts; and
- EMA staff are effective at convening and mobilizing partners, individuals, organizations to take action.

A protocol was developed with EMA leadership and piloted before respondents were contacted. (See Appendix). EMA staff provided the evaluators with a list of key stakeholders from which thirty (n=30) stakeholders were randomly selected and contacted to set up a phone interview. The sampling was purposive in order to hear from those who had experience working with EMA staff.

Interviewing and Analyses Methods

Twenty-three partners (77% of selected stakeholders) were interviewed by LMA staff. Three LMA program evaluators and one intern conducted the interviews. Two interviewers conducted six interviews each, one interviewer conducted seven interviews, and the fourth interviewer conducted four interviews. Interviewers spoke with 14 partners, one school district partner, one media partner, one national partner, three board members/funders, one board member/past chair, one funder/former EMA staff member, and one advocate. The interviews lasted 20-35 minutes on average.

Each respondent was asked permission to record the telephone interview. Evaluation staff made use of a software application, jog.ai, to record and transcribe the telephone interviews in real time. This software application utilizes a speech recognition platform based on the type of call made and then uses advanced Natural Language Processing (NLP) to highlight important parts of the call. The software also applies artificial intelligence processing based on datasets of past interactions or interviews to enhance the audio recording and transcription functions. After each call the interviewer downloaded the text and audio file for analyses.

Evaluation staff used analytic procedures for rapid identification of the themes⁶ from the audio recordings. A set of codes for the analysis was developed together by the evaluation team and then used to analyze each transcript/audio file. In addition, the coding form included an option

⁶ Neal, J.W., Neal, Z.P., VanDyke, E. and Kornbluh (2015). *Expediting the Analysis of Qualitative Data in Evaluation: A Procedure for the Rapid Identification of Themes from Audio Recordings (RITA)*. *American Journal of Evaluation*: 2015, vol. 36() pp.118-132.

for the analyst to assess the valence or weight of the evidence. (See Appendix for copies of these coding forms).

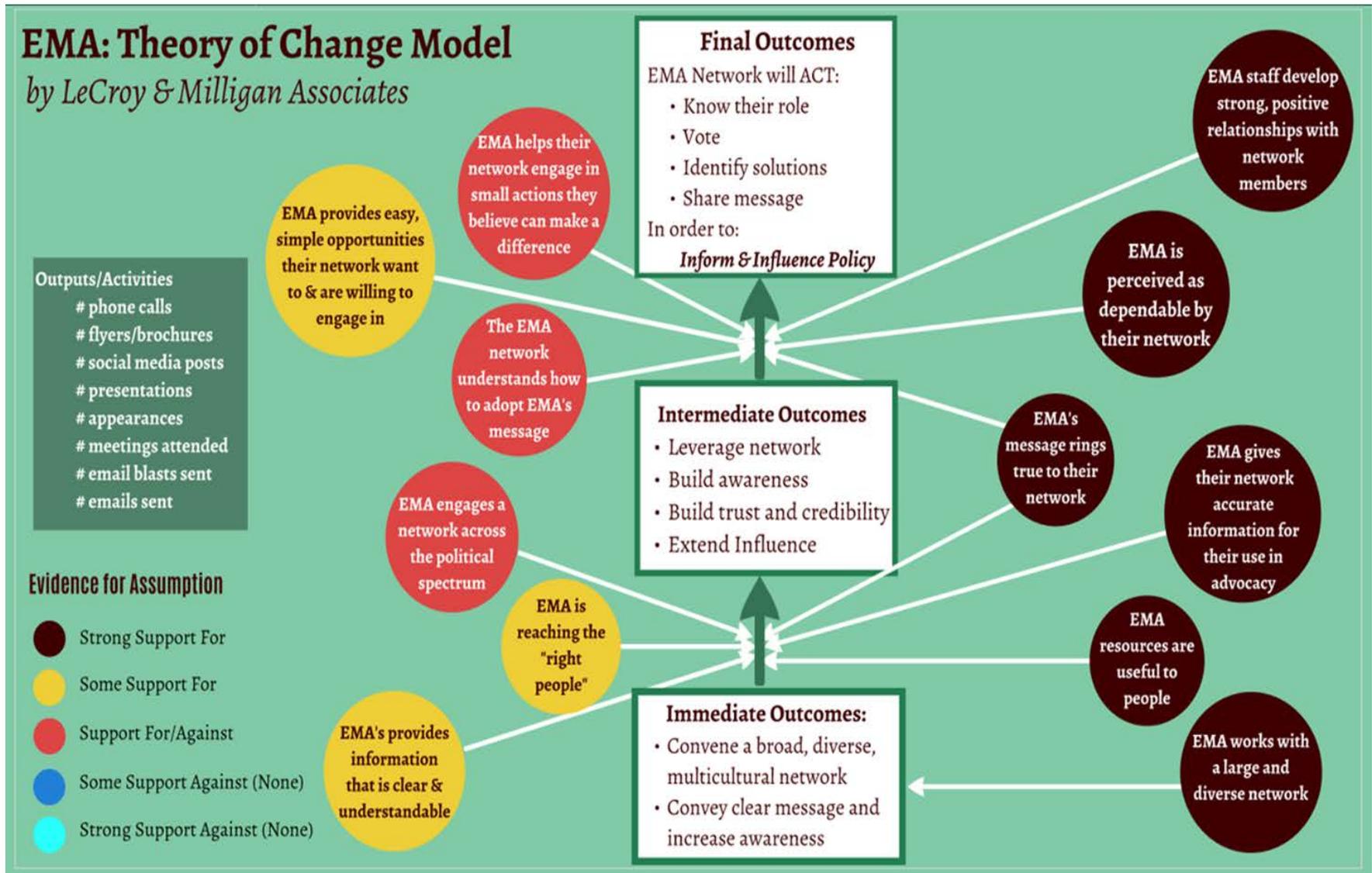
Results of First Round of Stakeholder Interviewing

Assessing Contributions to Outcomes – Validating EMA’s Theory of Change

As a result of the first work session and first round of interviews with key stakeholders, the following Theory of Change Model was developed and validated by EMA staff. This first draft model is shown on the next page, Exhibit 3. The model is designed as follows:

- The central results chain set of boxes represent the core results chain moving from immediate outcomes to final outcomes. The logic is that if EMA staff efforts result in positive outcomes then the next set of results are likely to occur. For example: effective convening activities results in extending the influence of EMA and EMA’s message.
- The circles contain within them the key assumptions that EMA staff identified from the first work session. These assumptions would need to be met in order for the outcomes to be achieved. These assumption areas are colored coded based on the evidence gained from the stakeholder interviews and review of other EMA materials. The darker colored circles on the right-hand side of the results chain are those assumptions with the strongest evidence in favor. The circles to the left-hand side of the results chain are those assumptions with less supportive evidence.
- It is important to note that there was a great deal of alignment between what EMA staff believed were key assumptions and what stakeholders discussed. This result is significant in that evidence from the interviews does validate and support the Theory of Change Model developed by EMA staff.

Exhibit 3 – EMA Theory of Change Model #1



Feedback for EMA from Stakeholders

As discussed earlier, the purpose of this evaluation was to understand if EMA is effective in increasing awareness, engaging partners, and moving people to take action. As information to evaluate these research questions was gathered, respondents offered some feedback that may be of interest to EMA, however was not the central purpose for this study. Evaluation staff also analyzed responses from all participants to the interview question: “For my last question, please describe one or two actions that EMA could take that would make them more effective as an advocacy organization and why do you think this action would make them more effective.” The following Exhibit 4 presents the results of that analysis across 27 respondents.

Exhibit 4 - Results of First Round Interviews: Recommendations to EMA to Improve Effectiveness

Recommendations (with the most often mentioned listed first and designated by an asterisk)	Examples
<p>*Be more daring /more willing to advocate/ willing to cross the state leadership/risk alienating people</p>	<ul style="list-style-type: none"> • “Be willing to take sides/ worry less about what a funder is gonna say or what a particular partner's going to like or not...” • “There would be an opportunity for EMA to actively advocate for the release of that data from the Department of Education even when the Department of Education is opposed to the release of such data.” • “I think they have to be willing to say more controversial things and mobilize people around more controversial actions if they're actually going to make an impact.” • “As an example, when the governor's budget came out and recommended a .4% teacher raise, Expect More clapped and applauded and said that was great. And most other education groups [said] ‘That's absurd. It's not enough and we need something real.’ And we actually got a 1% percent teacher raise each year for two years, so we pushed it up. Well Expect More was applauding the governor's proposal.... Applauding proposals that are that don't do much [but] actually undermines their own mission you're not going to move along the goals to the Arizona Education Progress Meter if you're willing to tolerate and accept...political rhetoric versus actual actions.” • “It is going to take a monolithic effort to impact policy right now, it is a heavy lift. I don't know if the EMA has the stomach for this type of a lift. You have to be willing to know you are not going to keep everyone with you. I think they need to stick their neck out, they may lose some supporters, but I think they would also gain some supporters too.” • “... They don't hold business leaders feet to the fire to really help them make an impact on education.”
<p>*Play more of a role in how to make needed change happen</p>	<ul style="list-style-type: none"> • “How are we're building the public will to really provide resources and incentives to make the adjustments so that we're improving the education system here is what. needs more communication and clarity.” • “Communicate more clearly about what resources and incentives are needed to make the adjustments to the education system. Really ensuring that they have strong connections to the... education bodies that are responsible for adjusting or making the changes that will actually lead to better education outcomes. So... ensuring that they're not short cutting the communication with those entities.” • “I don't think there are any dots connected between a vote for education and then literal action steps that actually make education better.” • “I don't think Expect More has clear messages or advocacy on how to make progress on the Arizona Education Progress Meter goals. I think the messaging on we have these goals and

<p>*Engage the general public in more ways</p>	<p>... measures are very strong. I would say very weak on advocating for action to make progress on the goals.”</p> <ul style="list-style-type: none"> • “I think what remains to be seen is then how are they working with partners who own those areas of actually making change within that. Obviously Expect More Arizona would not and could not be the instrument to actually move those indicators one way or another. So, then what is the relationship between Expect More Arizona and those that could.” • “I think they could do more about getting commentary or feedback from community even if they weren't necessarily trying to mobilize folks for a specific action. I think if they were engaging community more in decision making and feedback that that might help build up that base to do the activation when it's time...” • “I think the state could benefit from a broader level of informed awareness among the general populace. It's not just about influencing business government of civic or business leaders. I think it is a matter of engaging the general public as well. That's harder takes more time and effort. ... Broadens their base of support. ... it strengthens their voice, it amplifies their efforts. And its low risk if the polling data is in any way accurate and it's been consistent for over a decade that 80% of the voting public in the state of Arizona regard education as the top priority.” • “It would be great if representatives from Expect More Arizona avail themselves to PTO meetings or board meetings or other community events that provided a voice or an opportunity to educate the community. Or that was a way to collect input from the community.” • “To mirror the [formal] meetings ... that they have, the diverse gatherings that they have and translate that out into a ... visible public message.” • “It is important to help the average Arizonan to understand two things: we are doing well in education but we lack the resources and funding and we are in crisis. So, if EMA can help others understand that situation better so voters can be more informed about their candidates on their education stance ...”
<p>*Narrow their focus/ Be more selective in their focus/ Focus more on game-changing or moving the needle/ Be careful to focus on the achievable</p>	<ul style="list-style-type: none"> • “Have fewer initiatives to improve ability of partners to focus their energy.” • “Minimize “transactional” partners that provide name recognition but are not “game changing” (like the museums initiative): “..... what's really the added value that is providing... if the mission is to change what's happening in Arizona?” • “Match their programs and their philosophies and their ... thought processes along the lines of “What's politically achievable, what ... can we really change?””
<p>*Be more clear about what their goals are, what outcomes they want</p>	<ul style="list-style-type: none"> • “Be able to decide on their strategy/goals when there is not a major issue to rally around (e.g. Common Core).” • “They have so many initiatives that it is confusing...right...so you don't know when one ends and one begins....” • “And do they have clear outcomes, output that would indicate their effectiveness?”
<p>*Reach beyond Maricopa County more effectively</p>	<ul style="list-style-type: none"> • “I believe that they have absolutely put the right foundation in place for that work. My question would just be more how does that represent the outskirts of the other parts of our state that look very differently in reference to the resources and the champions that you need for to move education policy more broadly... partners outside of Maricopa County... partners in the outskirts of the state?” • “Partners tend to be limited to Maricopa County...” • “Their local person --- is really nice, but... needs more support and guidance in what to do.”
<p>*Be clear about their focus: neutral communicator or advocate</p>	<ul style="list-style-type: none"> • “... when I look at ... who can be a nonpartisan voice for education I think EMA can play a really important role and it has just been a little unclear to me if that is the main role they want to play or not... Could consider taking on a more confident role in advocacy but balance that against the value of their other role in communication” • “They've got to be careful about getting too much of it as advocacy group versus a group that's trying to get the right information out and provide the right data for everyone to use as a baseline for decisions.”

Be more reactive	<ul style="list-style-type: none"> • “When there is a redesign of the state report card or things like that. I think they could better galvanize people to take action and comment in those situations. They're good at developing opportunities for people to engage. But some of the stuff that's more reactive maybe isn't quite as fully developed in the way that folks can engage.”
Make sure data is vetted with the data source when possible	<ul style="list-style-type: none"> • “As much as possible vet the data with the actual data source before releasing to the public to avoid conflicting or confusing data (although we saw little evidence that people were confused by conflicting data).”
Engage in post event follow-up after Arizona Education Progress Meter launches	<ul style="list-style-type: none"> • “. . . the Arizona Education Progress Meter launches, those events are great for awareness raising for those that got to hear the message, but then there wasn't much post-event follow up to get people mobilized. . . .”
Take more care to have an accessible image	<ul style="list-style-type: none"> • “They have this extraordinary office in that very flashy part of town and a lot of money and a lot of power and a lot of connection. . . . They want to be the one to be the knight on the silver horse where in . . . reality that knight on the silver horse can't do it by themselves. They need the army behind them. . . . and I love these people . . . but down in my little portable [with] no air conditioning . . . meeting with five people . . . Regardless of if they don't pay rent because it's Helios' property . . . it doesn't sit well. . . . (other organization) . . . I think they've got a ton of money and they are in this rinky dink office and people just love them because they're relatable they're real.”
Be more visible	<ul style="list-style-type: none"> • “More visibility outside of their business. . . and their events. Such as being presenters at conferences for example or being visible at the Capitol or sending out regular mailers or e-mails with updates to the districts or to Alphabet's. Things that would just make them more visible in the education community.” • [Re: Arizona Education Progress Meter] “It's just not widely known enough, and I don't think that's necessarily through any fault of theirs. I think it's just... You know, it needs to gain ground. Sometimes they'll present, for example they presented it to cities and all of these town council members that attended were aware of it, but I'm not our council has acted on anything they've seen. I don't think it's the fault of their own, I think that the word just needs to get out more.”

Note: Some recommendations may conflict with each other given diverse opinions by respondents.

- **One respondent argued against doing anything dramatically different:** “I'm not a fan of expanding their charters or doing something dramatically different from what they do today. I think they do a very good job. I think if you start to see too many things. . . . just become Jack of all trades and master of none.”
- “In order to measure outcomes, Expect More Arizona will need to define or ‘operationalize’ for themselves those terms that are part of goals, such as ‘adoption’, ‘diversity’, and ‘advocacy’.

Respondents provided the following specific actions that EMA might take:

- “Lend their Marketing and communications expertise to others with the same messages who lack the communications expertise.”
- Fill a communication void around education that the AZ government fails to fill: “I think of them as playing a really critical role in the communications space, of being a very important mouthpiece megaphone for education in this state given the challenges in leadership in that we don't have, and that our Office of State Superintendent isn't really set up in that way. when I look at who, who can be a nonpartisan voice for

education I think EMA can play a really important role and it has just been a little unclear to me if that is the main role they want to play or not.”

- “I don't know what the role is but there's definitely a role for Expect More Arizona in the school funding discussion. I don't know if Expect More Arizona is the right one to take the lead.”
- “Bringing people together I think it would be around the 301 initiative or re-authorization.... A tax to support education. I think that's the biggest.... thing on a lot of people's minds.... A big chunk of dollars and it expires in a couple of years.”
- “I think what would help them is if they started to highlight some of the cool things that individual communities were doing so hopefully would inspire.”
- “.... right now, it's hard to read through all of the chatter. There are so many organizations that I think people are getting confused about who to listen to. This might be controversial but Expect More Arizona might grade those groups or rank those groups or somehow value those groups and prioritize them...so that the local voters would know that. Some are way more legitimate than others.”
- “Organize a Day at the Legislature: It would be great to them to have as a leader to organize legislative days where constituents could go as a group to meet with their state congress and provide tools like how you approach them, what do you do in those meetings.”
- “It would be fantastic if they could host regular or quarterly meetings with the three cradle to career partnerships in the state so we can do some collective planning on how to mobilize partners and voters.”
- “We need to mobilize business to take bigger action, they like to talk about education, but I don't see any real leadership from the business community. It would be great if EMA could provide some examples from other states about getting more money into education, policy, to help our AZ business leaders see what is possible with concrete examples.”

Respondents suggested the following other possible partners:

- **Goldwater Institute/representation that reaches the far right when possible.** The Goldwater Institute was mentioned specifically by three respondents. One said: “I don't know that I would *strongly* advocate for that. I don't know that you're ever going to have deep relationships with the Goldwater Institute. But I think there are times where there can be a common message and are common ground.” Another said: “I think they need to expand on groups that are on the right.....it kind of depends on the issue. But if you could get the Goldwater Institute to be supportive of the Arizona Education Progress Meter, touting it ...of course that will carry weight with people that they may or may not be able to reach the right side of the political spectrum.”

- **Local governments.** Two respondents mentioned local municipalities. One said: “I think if they had the bandwidth more work at a municipal level would prove effective. Rural and urban municipalities.... In the end the agenda is an economic development agenda. It's not it's not really an education agenda. Education is not an end unto itself. It's a means to a greater end and greater end as is individual and collective prosperity. So, I think if they if they had. more resources, if they had more time, if they had more people, that were money, engaging at a municipal level I think wouldbe very beneficial. ... it's not to say that they're not engaged there, but I thinkit would prove to be just fruitful work at the local level. The other said, “The governments.... such as state education agency, county education agencies.”
- **Elected officials (with caution).** Three respondents mentioned gaining more access to elected officials.
- **Faith-based community.** Two respondents mentioned the faith-based community. One said: “This might not be something that would be a fit for them but I do know that some groups have had success leveraging religious organizations faith based.”
- **Charter school advocates** (although another said: “They have a reasonably good relationship with the charter school and school choice areas”).
- **The mental health agencies in the [Maricopa] region**
- **Tucson Metro Chamber** – “There is a new president and CEO for them so it is a good time to introduce themselves.”
- **Tribal communities**
- **Industry leaders.** “What they need to do is focus on this really great Arizona Education Progress Meter and start working with industry leaders and saying ‘this is what we need. We know you need this for that’ and the industry leaders need to start pressing back on the legislature and the government to increase school funding or start working to solid education improvements overall statewide. Because the bigger corporations have the lobbying money to keep the...legislatures and legislators and staff at least listening to the conversation. Industry plays a huge role in helping to shift that policy if Expect More Arizona can message it correctly.

Second Round of Key Stakeholder Interviewing

The second round of interviewing was conducted in order to more specifically focus on the research question: “How effective is EMA at moving individuals and partners to take action to advance EMA’s short and long-term advocacy priorities (action on policy)?” The methods for and results from this second round of interviewing are described below.

Sample Selection

Similar to the first round of interviewing, EMA provided to the evaluation team a list of key stakeholders to interview. This list of stakeholders was intended to be those who had a more

policy level or leadership type role or function in regards to education advocacy efforts in Arizona. The final list of stakeholders to contact included 23 respondents chosen at random and 7 state Legislators selected by EMA who were thought to be most influential on education policy in the Legislature. One non-legislative stakeholder candidate was removed from the list by EMA because they had changed jobs. A total of 29 (n=29) people were selected to be reached out to for interviews.

Interviewing and Analyses Methods

A second interview protocol was developed in collaboration with EMA leadership and is presented in the Appendix. This protocol was also piloted by the evaluation staff before use. Twenty-two respondents (76% of selected stakeholders) were interviewed by LMA staff. Four LMA program evaluators and one intern conducted the interviews. Each interviewer conducted at least three interviews. These interviews lasted about 20 minutes on average.

Also similar to the first round of interviews, evaluators used the jog-ai software platform for immediate audio-recording and transcribing of the interviews. For this round, however, one analyst completed all of the transcript review and coding through content analysis. Given the narrower focus of this interview activity, coding and interpretation could be done more thoroughly by one analyst, with review of coding results by other evaluation team members.

Results of Second Round of Interviewing

The following presents the results of this second round of interviewing.

How Stakeholders in Advocacy Work Describe EMA's Direct Effect on Influencing Education Policy

Respondents were asked to describe ways in which they had experienced Expect More Arizona having a direct effect on influencing educational policy and the education policy environment. Results were content analyzed and revealed the following themes:

- Mobilizing people/Public calls to action (n=7)
- Arizona Education Progress Meter (n=7)
- Outreach to/ influence with policy-makers (n=6)
- Educate the public on key issues (e.g., social media) (n=5)
- Educating/developing consensus on Common Core/AZ Academic Standards (n=4)
- Highlighting teacher pay issues (n=3)
- Promoting voting for education (n=3)
- Empowering rural communities (n=2)
- Community organizing (n=2)
- AZ Achieve 60 (n=2)

- Endorsing/supporting others efforts around education (n=2)
- Bringing people together to find consensus (n=1)
- Targeted calls to action (e.g. business community) (n=1)

Evidence of Impact

Exhibit 5 illustrates the number choosing each responses option for each question. Bolded numbers are the most common response for that question. See Appendix for list of quotations providing evidence for the rankings.

Exhibit 5. Round 2 Interview Responses

Question	None	Some	A lot	Don't know
How much evidence have you seen that Expect More Arizona's work has helped education become a top priority for the public or Arizona? You can answer "none", "some", or "a lot".	1	12	9	0
How much evidence have you seen that Expect More Arizona has been effective in activating organizations, businesses, and individuals to support education who wouldn't normally have been involved?	3	11	7	1
How much evidence have you seen that Expect More Arizona's work has increased the belief that the whole education continuum matters , including pre-school, kindergarten through high school, and Higher Education?	1	9	12	0
How much evidence have you seen that Expect More Arizona affected education policy by working to make academic standards more rigorous throughout Arizona?	2	7	13	0
How much evidence have you seen that Expect More Arizona affected education policy through work on the Proposition 123 campaign [<i>to use land trust funds to finance public schools</i>] (examples include raising awareness, outreach to communities)?	1	10	8	3
How much evidence have you seen that Expect More Arizona affected education policy through work on the recent extension of Proposition 301 , which funds education through a sales tax [examples include raising awareness in the media, building urgency for 301's extension]?	5	6	7	4
How much evidence have you seen that the Arizona Education Progress Meter is a valuable contribution to education in Arizona?	1	3	18	0

Question	None	Some	A lot	Don't know
How much evidence have you seen that Expect More Arizona is a respected and trusted source for information on education issues?	0	7	15	0
How much evidence have you seen that Expect More Arizona influences business leaders, community leaders, and/or policymakers on education issues?	0	14	7	1

How Stakeholders in Advocacy Work View Expect More Arizona

We asked several questions designed to allow respondents to describe how they view EMA and its unique role. The questions were as follows:

- If you were describing Expect More Arizona's work to a colleague, how would you describe it?
- What makes Expect More Arizona’s work unique or different from other similar organizations / groups?
- What qualities does Expect More Arizona have that enables them to bring people together to discuss education issues?
- If EMA vanished tomorrow, what would be missing in the education conversation?

Due to the overlapping nature of the responses, results from these questions were content analyzed together. The themes of responses can be useful in helping EMA gauge whether the ways they *wish to be identified* are in fact the ways they *are* identified by their partners and allies.

The most common responses related to:

- 1) being an outreach /advocacy organization for high quality education / public education / funding for education;
- 2) being nonpartisan / nonpolitical / neutral; and
- 3) being relationship builders / developers of partnerships / collaborators / conveners.

All themes identified, in order of frequency were:

- Outreach/advocacy organization for high quality education/public education/funding for education (n=15)
- Non-partisan/nonpolitical/neutral (n=14)
- Relationship builders/developers of partnerships/collaborators/conveners (n=13)
- Broad base/representation of voices (n=7)

- Information resource (n=6)
- Balanced perspective that takes many stakeholders into account (n=5)
- State-wide (n=5)
- Communications provider (n=4)
- Developers/promoters of the Arizona Education Progress Meter (n=4)
- Try to develop consensus on education issues (n=4)
- Credibility/reach from grassroots to power brokers (n=4)
- Encourages parent and community involvement in supporting education policy/advocacy/voting (n=4)
- Supported by Helios (funding source, provides "cachet") (n=4)
- Covers the whole education continuum (n=3)
- Strong/influential leadership (n=3)
- Knowledgeable (n=3)
- Board/task forces have diverse representation (n=3)
- Engage other education organizations (n=3)
- Engage nonprofits/foundation (n=3)
- Focus on what the education standards/goals should be rather than identifying policies to address them (n=2)
- Investment in rural communities (n=2)
- Visible/well branded (particularly to the education community) (n=2)
- Engage the business community (n=2)
- Engage policy-makers (n=2)
- Passionate/Hard working (n=2)
- Diplomatic (n=2)
- Engage higher education institutions (n=2)
- Translate complex information for public understanding (n=1)
- Engage the general public (n=1)
- Professional (n=1)
- Not "rabble rousers" (n=1)
- Open to everyone (n=1)
- Less of a force than in the past (n=1)

Could Anyone Take Expect More Arizona's place?

Respondents were asked whether anyone could take EMA's place. **Most respondents to this question - 16 of 20 - reported that no other organization could take EMA's place;** three respondents identified specific areas in which other organizations could take EMA's place and

two respondents reported that they felt the work of EMA could be done by other organizations. Verbatim quotes are provided below:

Quotes that no one could take Expect More Arizona's place (n=16)

- *"... I don't know of any organization that does that.... The biggest thing is the balancing of varying viewpoints and trying to drive for a consensus and drive for a solution that can have a broad support. And they really are listened to by both sides of the aisle and viewed as as centrist as any education advocacy organization can be.....[Without them] I think we would cease to talk about the need to improve the overall system when we start to talk about specific solutions and advocate for specific solutions and I think you'd kind of end up fragmenting into corners."*
- *"What makes it different is that convener role and that they do serveas a public voice for citizens as well as organizations in the education space about, sort of, what's happening in education in the state of Arizona and how to, sort of, make sense of all of the information that's out there in this incredibly complex issue. And what it means, for example, for teachers to get a 20% pay increase and what does that mean in terms of still having work to do in the education space to make systemic change. So, I think being that voice in bringing people together to understand is unique just to Expect More.... [And] they are simply about outreach and awareness that education can be better and should be better than it currently is in the state and that parents should want that for their kids. Communities should want that for young people in their communities and so on, so they are the only ones that are kind of, from all sectors of the population, really trying to get people to step up and be active in this issue.... I can't think of another [organization that could take its place]There's just nobody that does that.... there's nobody else who's sort of taking up the voice of stakeholders... especially with elected officials and with the state government.... I can't think of a single other.... other agency that does that or would have the capacity or the desire to do that."*
- *"There would not be any organization that works with a diverse set of stakeholders to promote the message of public education in AZ. There would be individual groups that are speaking only from their perspective. EMA cultivates a diverse set of opinions linked to salient points that people can agree on."*
- *"Well there are lots of organizations in Arizona that do education-related and I'm sure many of them would say, 'We could do what Expect More does'...but to me I think it's unique position is that it is nonpartisan. It defies the normal compartmentalizing and labeling as it leans right, it leans left. Now, again, the danger of that if it doesn't lean at all and people don't think it has enough edge to be effective. But I find it very effective as a nonpartisan source of information.... Well I think that the convening power of Expect More, the timeliness of its efforts. None of us is indispensable, but I think they've done a really nice job of being a friend to all, an enemy to none, and a good source of information."*

- *“I think what makes them unique is that, in my mind, they are the only statewide, non-partisan nonprofit that is focused on communication around education both with education stakeholders and with a broader public audience.... I don't think there's anyone else that is uniquely in that space around the communication.... I don't think there are any other organizations that currently could take their place on the communications side of the house....”*
- *“I think various educational advocacy groups, they all maybe do parts of what Expect More Arizona does..... I ... suppose they could take on some of those things that make Expect More Arizona more.... unique But there are many education advocacy entities in this state and they, I think, rely on Expect More Arizona data when they are promoting whatever they're advocating for. So, I suppose in theory some combination of those groups could replace it or augment it but..... I think they at this point rely on them....”*
- *“There are other organizations that advocate, but no one on the scale of what Expect More does and no one quite as broad as what Expect More does.... we really wouldn't have a capacity anywhere to reach out on a statewide basis on a lot of issues and to mobilize folks that support public education in an inefficient or effective way. really Expect More is the only one that ... really has that reach and is able to bring a broad coalition of folks together. other organizations have a constituency that's very specific that has a broad reach, but Expect More, they are unique in that role and if they were to disappear that would set us back certainly.”*
- *“I don't know that another organization is positioned to take their place yet because I don't think other organizations have the span of..... individuals that are focused in on education. So, it's a pretty wide range...Well if they vanished tomorrow and they took their Arizona Education Progress Meter with them, I think that would be a big, big loss. I think the Arizona Education Progress Meter a lot of groups rather are looking at the Arizona Education Progress Meter as a common way to look at education and the dashboards within it.... if they left and they took their Arizona Education Progress Meter, I think we would be back to square one in a number of ways.”*
- *“I think Expect More does probably the best job of actually just compiling information and putting it out there in.... more of a nonpartisan way. Most of the other the other organizations tend to have a partisan bent to them I think, so I think Expect More is valued a little bit more in that arena.”*
- *“I'm not entirely sure that there are any other sort of nonpartisan groups that are able to do the grassroots sort of advocacy, without being attached to a particular ideology or political party.... I don't think that their advocacy could be easily translated.”*
- *“The Arizona Education Progress Meter ... Why would anybody else do it? I mean I think other people could but shouldn't...because [Expect More Arizona has] the resources, they have a strong comps (communications) department.”*
- *[If EMA vanished] “I think the Arizona Education Progress Meter would survive but I think the communication strategy around it and the constant reminders would be lost. And I don't necessarily see... I don't necessarily see an organization that would be out there to pick that up.”*

- *“I really can't see any other that is at the same level or that could replace them. I believe they've really been able to get people that normally wouldn't take action, to take action...”*
- *“There are...there are other groups that go around the edges of what Expect More does, but I don't think anybody really does what they do. (Some groups) do some overlap with them, but not really. They're more political. They're sometimes more grassroots in individual communities. They're organized differently...”*
- *“I say no and that is because I don't think anyone else covers that entire spectrum P-20....”*
- *“I don't know of another organization that would be prepared or have the expertise to enter that space in the near term at all.”*

Quotes that others could take Expect More Arizona's place in some areas (n=3)

- *“There's other organizations that could pick up, like for example, the Arizona Education Progress Meter. You know I think The Center for the Future of Arizona, which is their partner in that effort, could probably take that over..... Some of their more policy-oriented work could probably be done by nonprofits that exist currently.”*
- *“There are other organizations that do advocacy work.”*
- *“Not much [makes them different or unique] Not from other policy organizations. No, they've been lost in the shuffle. I think they have completely lost a foothold in the marketplace.... Or a place to go for information. They've been consumed by other people doing similar work and nobody understanding what the nuances are between what Expect More does and other organizations do.... We had 50,000 people marching on the Capitol, crickets. I didn't hear a single thing from ...Expect More, nothing.... We had 50,000 people down at the Capitol led by these new AEU..... They just consumed the narrative. I don't even think a single person down there would have probably even know who Expect More was, that's a problem if Expect More wants to be relevant.... “*

Quotes that others could entirely take Expect More Arizona's place (n=2)

- *“.... organizations that provide some aspects of data that are linked to Expect More Arizona such as the Children's Action Alliance. I think they provide a role. I think the Arizona School Board Association, I think they provide a role. I think Stand for Children, they provide a role as well. So, I think a hybrid of these organizations.... I think they could take Expect More Arizona's place.... From a data perspective I think that the School Board Association..... can playand Children's Action Alliance can play, can take Expect More Arizona's place from a data perspective and from an advocacy perspective, I think Stand for Children could take Except More Arizona's place....*

- *“Other groups could probably have done what they tried to do”*

Suggestions from Stakeholders

We asked respondents whether they had suggestions for Expect More Arizona that would enable EMA to do better work. Results were content analyzed. EMA’s “identity” was a recurring theme. As in Round 1, we heard from some respondents that they wanted EMA to remain non-partisan, others who wanted EMA to be more assertive, and still others who simply wanted them to decide between the two. Results related to EMA’s identity are as follows:

- Be more aggressive/push the envelope/not play it safe (n=5)
- Remain nonpartisan/Keep the organizational structure that enables them to balance "taking a position" and "can get along with everyone." (n=3)
- Decide whether they are going to be nonpartisan/get along with everyone (simply a communication provider/convener) or take policy stands (n=3)
- Keep the role in communicating information (whether or not they move farther into advocacy) (n=2)

Other less common themes that were identified are as follows:

- Do more than social media to get information out (e.g. PSAs, film shorts in theaters; talk radio) (n=2)
- Identify and promote things that "move the needle" on the Arizona Education Progress Meter (e.g. programs)
- Make sure EMA is known and relevant to legislators (especially new ones) (e.g. produce a "Primer" on what's happened legislatively in education in Arizona recently)
- Tell real life stories (e.g., telling the challenges of teachers getting recruited away by other states, their inability to have a middle-class life)
- Explain how the recent legislative session results from the Red for Ed campaign affected Arizona Education Progress Meter indicators.
- Target accurate information to teachers and educators.
- (Carefully) Engage more in the early stages of policy development
- Follow up with local governments who have adopted the Arizona Education Progress Meter to help them with next steps
- Have a more demographically diverse board (e.g., reflective of the state, ethnicity, power, economic levels, etc.)
- Leverage with other organizations
- Help voters ask education questions of candidates
- Establish who the new director is/distinguish her from strong predecessor
- To fundraise, create something programmatic in their portfolio

- Find a low-cost way to get convergent research on education
- Synthesize contradictory information about education for voters (as soon as possible) (e.g., if ATRA and AEA provide contradictory information about teacher pay, explain why their results differ, what sources each group is using, what they are taking into account – the GDP? Inflation? Cost of living? – that explains what appears to be contradictory results).
- Speak up more for higher education
- Helping rural area organizations have more of a voice by being recognized as an Expect More Arizona Partner

Summary – EMA Impact on Policy

The second round of interviewing was conducted in order to more specifically focus on the research question: “How effective is EMA at moving individuals and partners to take action to advance EMA’s short and long-term advocacy priorities (action on policy)?” It appears that most respondents do value EMA’s role in educating and raising awareness about educational policy issues. In addition, most respondents report that EMA seems to have a mostly non-partisan approach to their work; EMA is recognized as not associating itself with any particular political ideology. The majority of respondents also indicated their belief that EMA is unique and did not think that another organization could easily replace EMA. While there is certainly evidence supporting EMA’s ability to influence policy; respondents also indicated that EMA may be even more effective by being more aggressive in their efforts. This seemed mostly to do with how EMA may be perceived as too neutral or “playing it safe” by some respondents in terms of how active EMA was in advocating for or against a policy.

Findings and Key Considerations

Expect More Arizona – Evidence for Contribution: Influencing the Agenda for Education

One of the aims of this study was to develop and test the evidence for a Theory of Change model that represented how the various components of EMA's efforts lead to effective advocacy. The long-term outcome of Expect More Arizona is *to lead and influence Arizona's nonpartisan agenda for education, from early education through attainment*. Through a series of work-sessions with select EMA staff and reviews of EMA program and planning documentation, a Theory of Change model was constructed that identified the key assumptions that EMA staff believed had to be met in order for EMA to be successful in pursuing their long-term outcome. Results from forty-nine (N=49) interviews with key stakeholders to EMA's work provided evidence for an alignment between how EMA staff and leadership believe their efforts contribute to this long-term outcome and what stakeholder described in the interviews.

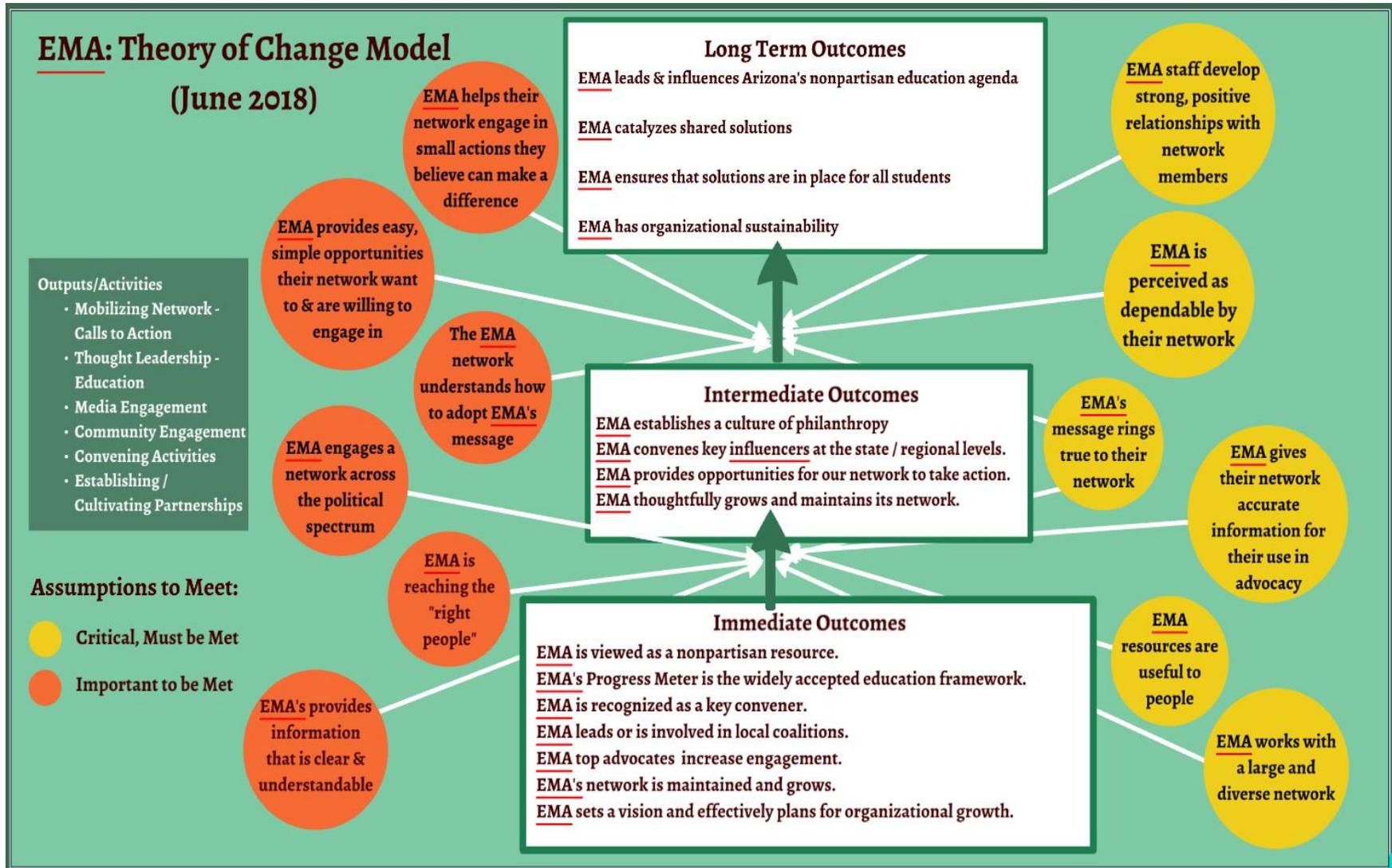
The results of the interviews with stakeholders and review of EMA materials provided different kinds of evidence in support of or aligned with how EMA leadership and staff believe their work contributes to the long-term outcome of leading and influencing Arizona's nonpartisan agenda for education, from early education through post-high school education. This is a positive finding.

Key Consideration – Alignment of EMA's Efforts and Outcomes

EMA can assess how effective they are at staying aligned with their mission and meeting these assumptions. EMA can collect data from internal staff, external stakeholders and partners on a regular basis to report on these assumption areas. This will be addressed more in a following section.

The following Exhibit 6 is a revision to the original Theory of Change model developed by EMA staff, see Exhibit 3 on page 21 above, that is now informed by empirical evidence from stakeholder interviews and review of secondary data. This final Theory of Change model presents the kinds of outcomes those who are engaged by EMA are expected to experience. It also presents the most critical assumptions that have to be met in order for EMA to influence outcomes. For example, if EMA needs to effectively engage broad, diverse, multicultural groups then EMA staff have to have the competencies and organizational resources in place to realize this kind of effective engagement. EMA can assess the effectiveness of their work by measuring both these assumptions and outcome areas with those they serve and with staff.

Exhibit 6 – Expect More Arizona Theory of Change Model (June 2018)



How effective is EMA at increasing awareness of EMA's key issues for select priority audiences?

Most respondents describe EMA as primarily an outreach / advocacy organization for high quality education, public education and with an advocacy focus on funding for education. Results from the stakeholder interviews indicate that the majority of respondents view EMA as very effective at increasing public awareness on key educational issues. We found very strong evidence for ways in which EMA contributes towards outcomes associated with raising awareness and educating Partners and other potential advocates on the issues.

"I think what makes them unique is that, in my mind, they are the only statewide, non-partisan nonprofit that is focused on communication around education both with education stakeholders and with a broader public audience.... I don't think there's anyone else that is uniquely in that space around the communication.... I don't think there are any other organizations that currently could take their place on the communications side of the house...."

The following were the kinds of awareness and education work that respondents associated most with EMA efforts:

- Mobilizing people/Public calls to action
- Development, Promote Use of the Arizona Education Progress Meter
- Outreach to/ influence with policy-makers
- Educate the public on key issues (e.g., social media)
- Educating/developing consensus on Common Core/AZ Academic Standards
- Highlighting teacher pay issues
- Promoting voting for education

Key Consideration – Increasing Awareness

Based on the results, EMA may consider the following in terms of ways to be more effective in conducting activities to raise awareness about key educational issues with the public.

- Calls from stakeholders for EMA to be more aggressive, “push the envelope”, and “not play it so safe” in advocacy communications and other efforts.
- Appreciation for the perception that EMA remains nonpartisan, encouraging EMA to keep an organizational structure that enables EMA to balance "taking a position" and "can get along with everyone”.

These two areas of suggestion seemed to be somewhat conflictual and it appeared as though many stakeholders were needing EMA to be more definitive in its approach. Advocating in a more effective way by remaining nonpartisan and being more aggressive in setting an agenda

for change. There also appeared to be a distinction that respondents were making in wanting EMA to continue an effective communications role on sharing information about educational issues and be effective in advocacy efforts that include and go beyond information sharing. This is clearly an area that EMA is viewed as very effective – in general. One suggestion is for EMA to more specifically communicate why information is being communicated and explain the intended effect of the communication.

How effective is EMA at convening and engaging partners to influence community efforts and thought leadership at the state and local levels?

EMA has as one of its goals to convene key influencers and community members to advance common ground solutions and build/maintain public will. Specifically, the long-term outcome that EMA is pursuing in this area is *to catalyze shared solutions through convening and collaboration that are inclusive and representative of our state’s diverse perspectives with reach in every county*. We found evidence in support of EMA’s effectiveness in a convening role. There also appeared to be a call for EMA continue to focus on expanding its outreach to various, diverse groups. Some respondents indicated the need for EMA to find ways to expand the work in more geographic areas.

***Reach beyond Maricopa County more effectively**

- “I believe that they have absolutely put the right foundation in place for that work. My question would just be more how does that represent the outskirts of the other parts of our state that look very differently in reference to the resources and the champions that you need for to move education policy more broadly.... partners outside of Maricopa County.... partners in the outskirts of the state?”
- “Partners tend to be limited to Maricopa County...”
- “Their local person in ---- is really nice, but.... needs more support and guidance in what to do.”

Other suggestions for outreach to more diverse groups and areas of the state included:

- “It would be fantastic if they could host regular or quarterly meetings with the three Cradle to Career Partnerships in the state so we can do some collective planning on how to mobilize partners and voters.”
- “We need to mobilize business to take bigger action, they like to talk about education, but I don’t see any real leadership from the business community. It would be great if EMA could provide some examples from other states about getting more money into education, policy, to help our AZ business leaders see what is possible with concrete examples.”

Key Consideration – Convening and Engaging Partners

While there was evidence that EMA is conducting activities in support of convening Partners to take action, there was also a clear sense that EMA needs to do more outreach as it designs convenings. The recommendation is to consider both geographic needs as well as to purposefully engage education stakeholders from all parts of the political ideologic spectrum.

EMA can assess its strategic goals in terms of how much their planned convening and engagement activities is intended to result in action occurring in select geographic areas. The same notion holds for EMA assessing its strategic planning efforts to assess how much the result of those efforts leads to engaging a specific group based on political ideologies.

How effective is EMA at moving individuals and partners to take action to advance EMA's short and long-term advocacy priorities (action on policy)?

Another strategic focus area for EMA is a goal on “deepening engagement of our network”. The outcome of which would be *to ensure that shared solutions are acted on and in place to further an excellent education for all students*. This was an area of significant focus across many of the respondents in both rounds of the interviewing. It was also a significant area of focus in the EMA staff work-sessions. The focus is on the difficult challenge of moving people through advocacy from awareness to action. While there was evidence of general agreement that EMA is effective at influencing people to take action on policy, it also was the area where that evidence was the least strong – meaning stakeholders’ perceiving either not a lot of evidence for this activity in this area and or not viewing it as consistently in their descriptions of what EMA is effective at in terms of advocacy work.

In particular respondents presented weaker evidence that EMA is very effective at “activating organizations, businesses, and individuals to support education who wouldn’t normally have been involved”. Another area of evidence that was not as strong was in response to the question of how much EMA influences business leaders, community leaders, and/or policymakers on education issues. There appears to be a perception amongst these stakeholders that while EMA is effective at moving individuals and partners to take action, the evidence for this is not as strong as in the other areas of communications and convening. The following quote illustrates a perspective of one respondent, with a view that EMA was not a significant actor in a recent advocacy effort.

“Not much [makes them different or unique] ... Not from other policy organizations. No, they've been lost in the shuffle. I think they have completely lost a foothold in the marketplace.... Or a place to go for information. They've been consumed by other people doing similar work and nobody understanding what the nuances are between what Expect More does and other organizations do.... We had 50,000 people marching on the Capitol, crickets. I didn't hear a single thing from Expect More, nothing.... We had 50,000 people down at the Capitol led by these new AEU..... They just consumed the narrative. I don't even think a single person down there would have probably even known who Expect More was, that's a problem if Expect More wants to be relevant.... ”

While this perception is unique to just one individual, it also illustrates one of the challenges of measuring the impact of advocacy work. While EMA may not have been viewed as highly visible in a particular moment of advocacy work, efforts of EMA previous to the event may indeed have been highly influential. The challenge remains as to how can EMA effectively engage others to take action and be noticed for an influence when the engagement and event may be far apart in terms of time. In advocacy work the efforts of EMA to influence Group A to act can be successful and then the influence of Group A on Group B is what gets recognized. This sort of non-linear influence on policy-making is real and difficult to document in a way for EMA to claim a contribution to a policy change.

Key Consideration – Moving Others to Action

In summary, this evaluation found credible evidence that EMA is effective at influencing others to action. The analysis indicates that the evidence was not as strong as in other outcome areas of EMA's work. This finding appears to be a common challenge for advocacy organizations who are seeking to find ways to identify and document the contributions that they are making to effective advocacy efforts. A recommendation that was suggested in conversations with EMA staff would be for EMA to carefully document and publicize instances where there was very direct evidence for EMA's influence by action. It appears that this could occur at either the local level and or the state level; given that EMA activities are aimed both at local and state level change. Perhaps consider a "EMA Impact" type of brief communication that is shared widely and succinctly highlights the work of an EMA staff member and or a partner. While the current EMA website has an "In the News" page; many of the articles on this page do not specifically indicate how EMA's actions influenced a change. While highlighting other's progress towards a shared vision is important, it is not the same as EMA communicating specifically how it's efforts added value, influenced a positive change in support of the shared vision.

Key Consideration - Selecting Key Performance Indicators to Monitor the Outcomes of EMA Advocacy Efforts

Results of this evaluation find that there is significant evidence for, and alignment of, the key components of EMA's Theory of Change model. This is significant in terms of identifying what actions of the organization are most likely, most logically able to contribute to intended outcomes. The assumptions that EMA staff and leadership have identified, see Exhibit 6 on page 33 above, as critical to meet so that activities can be implemented effectively and outcomes achieved, are also assumptions that key stakeholders find as important. The assumptions are the events and conditions that need to occur, according to the EMA Theory of Change model, if the causal link is to be realized. This alignment between EMA staff/leadership and a wide, diverse group of stakeholders is a significant finding.

Key Performance Indicators (KPIs) are the critical (key) indicators of progress toward an intended result. KPIs provides a focus for strategic and operational improvement, create an

analytical basis for decision making and help focus attention on what matters most. As an organization EMA does apply a set of key indicators for planning and management purposes. In order to assess how well EMA is meeting the critical assumptions the key consideration is to develop a system of measuring a set of indicators related to each critical assumption and outcome area. For EMA to manage with the use of these unique *Advocacy Efforts KPIs*, a set of targets (the desired level of performance) would be set and measurement done to track progress against the target. In fully developed performance management systems, leadership identifies leading indicators and lagging indicators. Leading indicators are thought to be precursors of future success. Lagging indicators illustrate how successful the organization was at achieving results in the past. A future task could be for EMA leadership to identify leading indicators after the current set of lagging indicators is in place and the information generated from these indicators is used effectively for management purposes.

The following Exhibit 7 presents a set of *Advocacy Efforts KPIs* aligned with EMA outcome areas for consideration. The purpose of these particular KPIs is to systematically assess how successful EMA organization / staff have been in meeting the critical assumptions. Targets can be set for each KPI and over time EMA performance assessed in different areas by select staff.

Exhibit 7 – Advocacy Efforts KPIs

Assumption Areas to Assess for Contribution	EMA Strategic Outcome Areas	Key Performance Indicators
<p>EMA staff effectively connect to / engage a large and diverse network of Partners.</p>	<p>EMA convenes key influencers at the state/regional levels.</p> <ul style="list-style-type: none"> • EMA is recognized as a key convener on education issues at the state/regional levels • EMA creates coalition(s) that inform and advance policies and funding to meet the Arizona Education Progress Meter goals • EMA leads or is a part of local convenings that create space for shared action 	<ul style="list-style-type: none"> • #, % of engaged partners across the political spectrum. • #, % of opinion leaders who perceive EMA as a critical, vital leader in education policy advocacy. • #, % of stakeholders who believe EMA is leading the state’s education agenda • #, % of stakeholders who believe that EMA is influencing Arizona’s education agenda • #, % of stakeholders who view EMA as a trusted resource • #, % of opinion leaders who perceive EMA as a nonpartisan resource
<p>EMA resources are useful to Partners / clients.</p> <p>EMA staff provides information that is utilized in advocacy work.</p>	<p>EMA is a resource for timely, nonpartisan information.</p> <ul style="list-style-type: none"> • EMA is viewed as a nonpartisan resource to policymakers, key influencers, media, and business leaders. • The Arizona Education Progress Meter is the widely accepted education framework 	<ul style="list-style-type: none"> • #, % of stakeholders who report they value EMA Services • #, % of network members who report they are satisfied with EMA • #, % of network members who rate their relationship with EMA as adding value to group / agency efforts. • #, % of network members who report EMA messaging is aligned with their advocacy focus • #, % of network members who report EMA provides accurate information • #, % of network members who report they use shared information • #, % of partners who believe the Arizona Education Progress Meter is the widely accepted education framework

Exhibit 7 cont. Advocacy Efforts KPIs

Assumption Areas to Assess for Contribution	EMA Strategic Outcome Areas	Key Performance Indicators
<p>EMA staff are effective at developing strong, positive relationships with clients.</p>	<p>EMA convenes key influencers at the state/regional levels.</p> <ul style="list-style-type: none"> • EMA is recognized as a key convener on education issues at the state/regional levels • EMA creates coalition(s) that inform and advance policies and funding to meet the Arizona Education Progress Meter goals • EMA leads or is a part of local convenings that create space for shared action 	<ul style="list-style-type: none"> • #, % of stakeholders who report they value EMA Products / Services • #, % of network members who report they are satisfied with EMA products / services • #, % of stakeholders who were involved in EMA convening activities. • #, % of stakeholders who recognize EMA as a key convener on education issues • #, % of network members who report EMA messaging is aligned with their advocacy focus
<p>EMA staff provides / facilitates opportunities for action that their clients want to and can engage in.</p> <p>EMA staff teaches clients how to adopt EMA’s message.</p>	<p>EMA provides opportunities for our network to take action</p> <p>EMA thoughtfully grows and maintains its network</p>	<ul style="list-style-type: none"> • #, % of network members who can identify specific EMA supports that led to action on policy. • #, % of network members who identify which EMA supports led to specific action / change. • #, % of network members who identify how EMA supports enable group to affect change • #, % of coalition(s) that inform and advance policies and funding to meet the Arizona Education Progress Meter goals (convening). • #, % of Coalition members actively involved in advocacy work

Appendix

Theory of Change Work Sessions with Staff: Worksheets

RESULTS CHAIN / THEORY OF CHANGE WORKSHEET: FOCUS AREA ON INFLUENCE AND USE OF ARIZONA EDUCATION PROGRESS METER

LEVERAGE / RAISE AWARENESS / BUILD SUPPORT	CONVENING	MOVING TO ACTION	FY 2018 GOAL AREA
<p>LEVERAGE EXISTING AND NEW PARTNERS TO RAISE AWARENESS AND BUILD SUPPORT of the Arizona Education Progress Meter as the accepted education roadmap in local communities across the state</p>	<p>Use the Arizona Education Arizona Education Progress Meter as the tool to CONVENE INDIVIDUALS AND ORGANIZATIONS in order to influence community efforts and thought leadership in priority communities.</p>	<p>MOVE INDIVIDUALS AND PARTNERS TO TAKE ACTION to support/oppose policies, legislation or ballot initiatives in such a way that it advances our short- and long-term advocacy priorities and makes progress toward the 2030 Arizona Education Progress Meter goals.</p>	<p>Use the Arizona Education Arizona Education Progress Meter (Arizona Education Progress Meter) as the primary vehicle for building influence, convening leaders across the state, advancing our advocacy priorities and mobilizing individuals and organizations to take action.</p>
<ul style="list-style-type: none"> • TACTIC: Recruit partners to be spokespeople for the #AZPROGRESS social media campaign • TACTIC: Disseminate tools and messaging to support the Arizona Education Progress Meter and our FY18 policy priorities 	<ul style="list-style-type: none"> • TACTIC: Launch the Arizona Education Progress Meter goals • TACTIC: Leverage partner relationships to align existing community efforts with the Arizona Education Progress Meter 	<ul style="list-style-type: none"> • TACTIC: Engage/Inspire our network to contact policymakers, speak up and show up during legislative session to advance our advocacy priorities • TACTIC: Get local governments to adopt 	<p>WHAT SUCCESS LOOKS LIKE BROADLY:</p> <ul style="list-style-type: none"> - Media around the state reference the Arizona Education Progress Meter, indicators, data and goals - Policymakers – local and statewide – use the Arizona

<ul style="list-style-type: none"> • TACTIC: Hold desk side meetings or editorial board meetings with media outlets in relevant priority communities • TACTIC: Collect and share Excellence Tour stories aligned with each indicator to show how progress is being made and to elevate/highlight the work of our partners 	<ul style="list-style-type: none"> • TACTIC: Launch two new regional councils and a Latino council and continue to support the existing Yuma Council to streamline partner engagement and advance the Arizona Education Progress Meter and aligned advocacy priorities in local communities. • TACTIC: Convene regional meetings to advance the teacher pay goal (share teacher report data) • TACTIC: Continue participating in relevant external boards, councils, task forces, etc. in order to influence their agendas/align with the Arizona Education Progress Meter 	<p>the Arizona Education Progress Meter and align local efforts accordingly</p> <ul style="list-style-type: none"> • TACTIC: Identify and mobilize highly engaged advocates in our network to take further action in support of our advocacy priorities 	<p>Education Progress Meter to inform policy decisions around education, with eye toward moving our state toward goals</p> <ul style="list-style-type: none"> - Local initiatives, school districts, municipalities, etc. in priority communities adopt the Arizona Education Progress Meter and align efforts to the indicators and goals. - Expect More Arizona meets FY18 fundraising goal - Broad public awareness of Arizona Education Progress Meter - Successful advancement of FY18 advocacy priorities during legislative session
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Instructions: Identify and Rank up to 3 most critical impacts that have to be achieved towards a long-term outcome area.

IMMEDIATE IMPACTS / OUTCOMES	INTERMEDIATE IMPACT / OUTCOMES	LONGER TERM IMPACTS / OUTCOMES
IF WE DO THIS.... THEN....	IF WE DO THIS.... THEN....	
		<p>LEVERAGE EXISTING AND NEW PARTNERS TO RAISE AWARENESS AND BUILD SUPPORT of the Arizona Education Progress Meter as the accepted education roadmap in local communities across the state.</p>
		<p>Use the Arizona Education Progress Meter as the tool to CONVENE INDIVIDUALS AND ORGANIZATIONS in order to influence community efforts and thought leadership in priority communities.</p>
		<p>MOVE INDIVIDUALS AND PARTNERS TO TAKE ACTION to support/oppose policies, legislation or ballot initiatives in such a way that it advances our short- and long-term advocacy priorities and makes progress toward the 2030 Arizona Education Progress Meter goals.</p>

Instructions: Identify and Rank the 2 most critical assumptions that must be met to achieve the impact / outcome. Consider external factors and rate EMA influence.

EXTERNAL INFLUENCES / RISKS	LEVERAGE / RAISE AWARENESS / BUILD SUPPORT: IMMEDIATE IMPACT / OUTCOME ASSUMPTIONS	RATE LEVEL OF INFLUENCE OF EMA ACTIONS ON ASSUMPTIONS & RISKS: <ul style="list-style-type: none"> - "C" - EMA has control over this assumption / risk. - "DI" - EMA has direct influence over this assumption / risk. - "II" - EMA has indirect influence over the assumption / risk. - "0" - EMA has no influence over assumption / risk.
EXTERNAL INFLUENCES / RISKS	LEVERAGE / RAISE AWARENESS / BUILD SUPPORT: INTERMEDIATE IMPACT / OUTCOME ASSUMPTIONS	RATE LEVEL OF INFLUENCE OF EMA ACTIONS ON ASSUMPTIONS & RISKS: <ul style="list-style-type: none"> - "C" - EMA has control over this assumption / risk. - "DI" - EMA has direct influence over this assumption / risk. - "II" - EMA has indirect influence over the assumption / risk. - "0" - EMA has no influence over assumption / risk.
EXTERNAL INFLUENCES / RISKS	LEVERAGE / RAISE AWARENESS / BUILD SUPPORT: LONG TERM IMPACT / OUTCOME ASSUMPTIONS	RATE LEVEL OF INFLUENCE OF EMA ACTIONS ON ASSUMPTIONS & RISKS: <ul style="list-style-type: none"> - "C" - EMA has control over this assumption / risk. - "DI" - EMA has direct influence over this assumption / risk. - "II" - EMA has indirect influence over the assumption / risk. - "0" - EMA has no influence over assumption / risk.

Instructions: Identify and Rank the 2 most critical assumptions that must be met to achieve the impact / outcome. Consider external factors and rate EMA influence.

EXTERNAL INFLUENCES / RISKS	CONVENE INDIVIDUALS AND ORGANIZATIONS: IMMEDIATE IMPACT / OUTCOME ASSUMPTIONS	RATE LEVEL OF INFLUENCE OF EMA ACTIONS ON ASSUMPTIONS & RISKS: - "C" - EMA has control over this assumption / risk. - "DI" - EMA has direct influence over this assumption / risk. - "II" - EMA has indirect influence over the assumption / risk. - "0" - EMA has no influence over assumption / risk.
EXTERNAL INFLUENCES / RISKS	CONVENE INDIVIDUALS AND ORGANIZATIONS: INTERMEDIATE IMPACT / OUTCOME ASSUMPTIONS	RATE LEVEL OF INFLUENCE OF EMA ACTIONS ON ASSUMPTIONS & RISKS: - "C" - EMA has control over this assumption / risk. - "DI" - EMA has direct influence over this assumption / risk. - "II" - EMA has indirect influence over the assumption / risk. - "0" - EMA has no influence over assumption / risk.
EXTERNAL INFLUENCES / RISKS	CONVENE INDIVIDUALS AND ORGANIZATIONS: LONG TERM IMPACT / OUTCOME ASSUMPTIONS	RATE LEVEL OF INFLUENCE OF EMA ACTIONS ON ASSUMPTIONS & RISKS: - "C" - EMA has control over this assumption / risk. - "DI" - EMA has direct influence over this assumption / risk. - "II" - EMA has indirect influence over the assumption / risk. - "0" - EMA has no influence over assumption / risk.

Instructions: Identify and Rank the 2 most critical assumptions that must be met to achieve the impact / outcome. Consider external factors and rate EMA influence.

EXTERNAL INFLUENCES / RISKS	MOVE INDIVIDUALS & PARTNERS TO ACTION: IMMEDIATE IMPACT / OUTCOME ASSUMPTIONS	RATE LEVEL OF INFLUENCE OF EMA ACTIONS ON ASSUMPTIONS & RISKS: <ul style="list-style-type: none"> - "C" - EMA has control over this assumption / risk. - "DI" - EMA has direct influence over this assumption / risk. - "II" - EMA has indirect influence over the assumption / risk. - "0" - EMA has no influence over assumption / risk.
EXTERNAL INFLUENCES / RISKS	MOVE INDIVIDUALS & PARTNERS TO ACTION: INTERMEDIATE IMPACT / OUTCOME ASSUMPTIONS	RATE LEVEL OF INFLUENCE OF EMA ACTIONS ON ASSUMPTIONS & RISKS: <ul style="list-style-type: none"> - "C" - EMA has control over this assumption / risk. - "DI" - EMA has direct influence over this assumption / risk. - "II" - EMA has indirect influence over the assumption / risk. - "0" - EMA has no influence over assumption / risk.
EXTERNAL INFLUENCES / RISKS	MOVE INDIVIDUALS & PARTNERS TO ACTION: LONG TERM IMPACT / OUTCOME ASSUMPTIONS	RATE LEVEL OF INFLUENCE OF EMA ACTIONS ON ASSUMPTIONS & RISKS: <ul style="list-style-type: none"> - "C" - EMA has control over this assumption / risk. - "DI" - EMA has direct influence over this assumption / risk. - "II" - EMA has indirect influence over the assumption / risk. - "0" - EMA has no influence over assumption / risk.

Data Collection Protocols

First Round Interview Protocol

EMA STAKEHOLDER INTERVIEW – PROTOCOL

Date of Interview: _____ Start Time: _____ End Time: _____

Interviewer: _____

Hello. I'm _____ from LeCroy & Milligan Associates. We are working with Expect More Arizona to evaluate their advocacy work. Am I speaking to _____[candidate's full name]_____?

I understand that you have been involved with Expect More Arizona and I'd like to ask you some questions about your experience. The interview will take 20-30 minutes. Is this a good time to talk?

I'll be tape recording our conversation so we can capture your ideas clearly but your responses will be confidential; only staff here at LeCroy & Milligan Associates will see your interview data and your name would not be associated with any of your responses when we report summary results. Is that ok?

- I'd like to make sure you know that:
- There are no right or wrong answers;
- Your participation is voluntary; and
- You can choose to not answer any question or end the survey at any time, with no impact on your relationship with Expect More Arizona.

Q1: For my first question.....can you please describe for me your relationship or role with Expect More Arizona.

Q2: Partners may have different kinds of experience with Expect More Arizona such as receiving information or resources, raising awareness on an issue, taking action on specific policy issues, collaborating on the Arizona Education Progress Meter, or serving on a board or council. Please describe for me the most recent experience you had working with Expect More Arizona.

Q3: One goal of the work of Expect More Arizona is to elevate the Arizona Education Progress Meter to be the widely accepted framework in local communities and at the state level. Expect More Arizona believes that using the Arizona Education Progress Meter framework can create needed changes in education in the state. How clear and easy to understand do you think Expect More Arizona's message is?

Sub-Questions:

- How much does Expect More Arizona's message ring true for you?
- What do you think it looks like when a partner or organization "adopts" Expect More Arizona's message?
- How "non-partisan" do you think Expect More Arizona's message is? In other words, do you think Expect More Arizona's message is relevant to people regardless of their political beliefs?
- Besides information from Expect More Arizona, what are your other primary sources of information about education in Arizona?
 - o When you see information from these other sources, does it sometimes conflict with information that Expect More Arizona provides? If so, is this ever confusing for you?
- Are the resources provided by Expect More Arizona useful to you? Do you think they are useful to others?
 - o Why or why not?
 - o Can you provide an example of how the resources were useful to you and/or others?

Q4a: Another important focus of the work of Expect More Arizona is to bring individuals and organizations together to influence community efforts and education policy. Can you describe ways you have observed Expect More Arizona bringing people together so they can act to influence change?

Sub-Questions: (probe for examples where relevant)

- Do you know what other partners Expect More Arizona works with?
- Does Expect More Arizona only 'preach to the choir,' essentially only reaching people who already agree with their message?
- Do you think Expect More Arizona works with a large and diverse set of partners?
- Do you believe that a large, diverse set of partners is necessary to influence policy?
- Do you think Expect More Arizona is working with the right partners- (i.e., partners who can influence policy or affect change)?
 - o What partners do you think Expect More Arizona is missing?
- In what ways has Expect More Arizona provided timely, simple and easy ways for you or your organization to support education?
- Are there any other opportunities for action that you wish Expect More Arizona would provide?
- Do you think small actions make a difference in education policy?

- Do you have any examples of how Expect More Arizona has been able to influence change by bringing groups together?

Q4b. Please describe an example of how you or an organization you are part of used information from Expect More Arizona that led to some kind of action. [Results chain]

Sub-Questions:

- o Do you have any examples of other people or other groups that used information from Expect More Arizona that led to some kind of action?

Q5: For my last question, please describe one or two actions that EMA could take that would make them more effective as an advocacy organization and why do you think this action would make them more effective.

That was my last question. Thank you so much for your time. Your feedback will be helpful in guiding the efforts of Expect More Arizona going forward.

Is there anyone else you know who works with Expect More Arizona that you think would be interested in sharing their experience with me?

Thank you again.

Second Round Interview Protocol

EMA STAKEHOLDER INTERVIEW - PROTOCOL (2nd round) 3 30 18

Date of Interview: _____ Start Time: _____ End Time: _____

Interviewer: _____

Hello. I'm _____ from LeCroy & Milligan Associates. We are working with Expect More Arizona to evaluate their advocacy work. Am I speaking with _____ [candidate's full name]_____?

I understand that you have been involved with Expect More Arizona and I'd like to ask you some questions about your experience. The interview will take 15-20 minutes. Is this a good time to talk?

I'll be tape recording our conversation so we can capture your ideas clearly but your responses will be confidential; only staff here at LeCroy & Milligan Associates will see your interview data and your name would not be associated with any of your responses when we report summary results. Is that ok?

- I'd like to make sure you know that:
- There are no right or wrong answers;
- Your participation is voluntary; and
- You can choose to not answer any question or end the survey at any time, with no impact on your relationship with Expect More Arizona.

Shall we get started?

Q1: For my first question, can you please describe for me your connection with Expect More Arizona.

Q2: If you were describing Expect More Arizona's work to a colleague, how would you describe it?

- What makes Expect More Arizona's work unique or different from other similar organizations / groups?
- Is there another organization that does what Expect More Arizona does or could take its place? Why or why not?
- What qualities does Expect More Arizona have that enables them to bring people together to discuss education issues?
- If EMA vanished tomorrow, what would be missing in the education conversation?

Q3. Please describe ways in which you have experienced Expect More Arizona having a direct effect on influencing educational policy. This might be through strategies like communications, relationship-building, knowing the right people, being a trusted source of information, rallying their network, sharing information, or influencing policy decisions behind the scenes.

Q4: Now I would like to ask you a few questions about Expect More Arizona's ability to reach and engage the public. For each question you can answer "none", "some", or "a lot".

None Some A lot Don't know

Q4a. How much evidence have you seen that Expect More Arizona's work has helped education become a top priority for the public or Arizona? You can answer "none", "some", or "a lot". [If "some" or "a lot"] Can you describe how their work has helped education become a top priority?

Q4b. How much evidence have you seen that Expect More Arizona has been effective in activating organizations, businesses, and individuals to support education who wouldn't normally have been involved? [If "some" or "a lot"] Can you describe how their work has activated the public?

Q4c. How much evidence have you seen that Expect More Arizona’s work has increased the belief that the whole education continuum matters, including pre-school, kindergarten through high school, and Higher Education? [If “some” or “a lot”] Can you describe how their work has increased this belief that the whole education continuum matters?

Q5. I’m going to ask you a few questions now about ways that Expect More Arizona might have an effect on influencing education policy in Arizona. For each question you can answer “none”, “some”, or “a lot”.

None Some A lot Don’t know

Q5a. How Much evidence have you seen that Expect More Arizona affected education policy by working to make academic standards more rigorous throughout Arizona [through promoting standardized curriculum guidance and standardized testing for students]? [If “some” or “a lot”] Can you describe what role they played?

Q5b. How much evidence have you seen that Expect More Arizona affected education policy through work on the Proposition 123 campaign [to use land trust funds to finance public schools] (examples include raising awareness, outreach to communities)? [If “some” or “a lot”] Can you describe what role they played?

Q5c. How much evidence have you seen that Expect More Arizona affected education policy through work on the recent extension of Proposition 301, which funds education through a sales tax [examples include raising awareness in the media, building urgency for 301’s extension]? [If “some” or “a lot”] Can you describe what role they played?

Q5d. How much evidence have you seen that the Arizona Education Progress Meter is a valuable contribution to education in Arizona? [If “some” or “a lot”]

- Can you describe the contribution you think the Arizona Education Progress Meter is making? [If “some” or “a lot”] Who have you noticed using the Arizona Education Progress Meter (e.g., elected leaders, schools, business leaders, media)?

Q6: I have just a few more questions. For each question you can answer “none”, “some”, or “a lot”.

None Some A lot Don’t know

Q6a. How much evidence have you seen that Expect More Arizona is a respected and trusted source for information on education issues? [If “some” or “a lot”] Can you describe why you think that?

Q6b. How much evidence have you seen that Expect More Arizona influences business leaders, community leaders, and/or policymakers on education issues? [If “some” or “a lot”] Can you describe why you think that?

Q7: Finally, do you have any suggestions for Expect More Arizona that you think would enable them to do better work? Is there any role that they should be playing that they are not?

That was my last question. Thank you so much for your time. Your feedback will be helpful in guiding the efforts of Expect More Arizona going forward. Thank you again.

First Round Interview – Coding Sheet for Analysis

Keys for Coding

Item	Code	Description
1	Easy and Simple	EMA provides easy, simple opportunities for action that partners want to and are willing to engage in.
2	Clear Information	EMA provides information that is clear, understandable.
3	Rings true	EMA's message rings true to partners.
4	Understands "adoption"	Partners know or understand what "adoption" of EMA's message means.
5	Confusion About Other Sources	Partners are not confused about information from other sources.
6	Useful Resources	EMA resources are useful to people & respondent can provide example(s) of actions/changes that have resulted from EMA's work.
7	Partners Worked With	EMA works with a large and diverse set of partners.
8	Partners Who Can Affect Change	Working with a large and diverse set of partners is important for affecting change/they are working with the right people.
9	Reaching 'Right' People	EMA is reaching the 'right' people.
10	Small Actions	Partners believe small actions do make a difference.
11	Not Preaching	EMA is not 'preaching to the choir'.
12	Relationships and Accountability	Strong relationships with EMA staff are important & partners can count on EMA staff.

Valence:	SF	Strong evidence that supports the claim
	WF	Weak evidence that supports the claim
	N	Neutral (no evidence for or against)
	WA	Weak evidence against
	SA	Strong evidence against

Coding Sheet

SF=Strong evidence that supports the claim WF=Weak evidence that supports the claim N=Neutral (no evidence for or against) WA=Weak evidence against SA=Strong evidence against	0:00 - 4:59 MINS	Valence	5:00 - 9:59 MINS	Valence	10:00 - 14:59 MINS	Valence	15:00- 19:59 MINS	Valence	20:00- 24:59 MINS	Valence	25:00+ MINS	Valence	Notes
EMA provides easy, simple opportunities for action that partners want to and are willing to engage in.													
EMA provides information that is clear, understandable.													
EMA's message rings true to partners - aligned with beliefs/philosophy that Partner shares.													
Partners understand how to adopt EMA's message.													
EMA helps Partners to have accurate information for their use in advocacy - Partners are not confused by information from other sources.													
EMA resources are useful to people - respondent can provide example(s) of actions/changes that have resulted from EMA's work.													

SF=Strong evidence that supports the claim WF=Weak evidence that supports the claim N=Neutral (no evidence for or against) WA=Weak evidence against SA=Strong evidence against	0:00 - 4:59 MINS	Valence	5:00 - 9:59 MINS	Valence	10:00 - 14:59 MINS	Valence	15:00-19:59 MINS	Valence	20:00-24:59 MINS	Valence	25:00+ MINS	Valence	Notes
To better effect change, EMA works with a large and diverse set of partners.													
EMA is reaching the 'right' people - people who have credibility, are most likely to act.													
EMA helps Partners engage in small actions they believe can make a difference.													
EMA is not just 'preaching to the choir' -they are able to engage as partners across the political spectrum or who are not typically at the same table together.													
EMA Staff are able to develop strong, positive relationships with Partners.													
EMA is perceived as dependable by Partners.													

Second Round Interviews - Types of evidence by level of evidence

How much evidence have you seen that Expect More Arizona’s work has <u>helped education become a top priority for the public or Arizona?</u>	
<p>Examples of justification for “a lot”</p>	<ul style="list-style-type: none"> • <i>“I just think having that drumbeat that they and others... I don't think it's only them, but I certainly think they've had a central role... it definitely helped the visibility. Education is the number one issue for voters now and it wasn't five years ago..... I think all of us that are in that space own a piece of that but Expect More owns a big piece of it.”</i> • <i>“I think in the case of the public, the single biggest thing they've done is their network and their ability to reach large numbers of voters with information and data that they trusted, which then causes them to take action either by voting or by contacting a legislator or whateveris necessary in that instance.”</i> • <i>“I think that they look at their stakeholder group in a broad fashion, they look at the business community as a very important stakeholder group, local governments,cities and counties, and then of course they look at the policymakers themselves in terms of course what advocacy work can be done at local school boards, to the state legislature, and then working within the education community itself, working with educators. I know that their work in Coconino County has involved a lot of discussions with educators and teachers themselves, which is an important part, if you're going to have if your role is going to be in advocating for education you ought to have a lot of discussion with those that are actually providing the teaching and so that's important stakeholder groups. So again, in response, I think they've not just looked at one stakeholder group and focused on that group. They've looked at a number of different, various stakeholder groups that all coming together truly can have an impact on the educational policy.”</i>
<p>Examples of justification for “some”</p>	<ul style="list-style-type: none"> • <i>“They have a large network on social media I think it's over 70,000 people now and that certainly has an impact. I'm not naive enough to think that that is the major piece that is moving education attitudes and positions around the state but it's certainly a piece of it and an important piece of it.</i> • <i>“EMA has communicated with more depth and reached further into the elected officials to make them aware of the community. Especially the business community. Their boards are populated with business members. Communication with schools has penetrated somewhat as well as education leaders. There was a video campaign for two months on why education was so important. Identifying quality efforts, programs and stories, showing the positives. They have a very good communications staff that share their message. This communication is relied upon by many of these groups.”</i> • <i>“Through advocacy, through constant participation at the Capitol, through their calls to action via their e-mail calls to action online. They generate a lot of support quickly.”</i> • <i>“They have kind of galvanized, I think, the education community around this whole Achieves 60 idea with their Progress Meter andthose points that they're measuring have basically become talking points that I've seen from [a university president], from the State Board of Education members.”</i>

<p>Examples of justification for “none”</p>	<ul style="list-style-type: none"> • <i>“Well it depends on what the time frame is. I mean back in 20... 11 and 12 a lot. And it dwindled down to some and now not at all..... I mean it's the same thing we're seeing right now for Red for Ed. They had branding materials out there. They had parents ...and education advocates kind of organized around, rallying around education as a campaign issue. It was at the very beginning of one of these social media campaigns. But it's just been completely drowned out.”</i>
<p>How much evidence have you seen that Expect More Arizona has been effective in <u>activating organizations, businesses, and individuals to support education who wouldn't normally have been involved?</u></p>	
<p>Examples of justification for “a lot”</p>	<ul style="list-style-type: none"> • <i>“I think under the prior leadership of Expect More, I think there was a huge concerted effort of getting the business community involved and the chambers of commerce. And I think that was highly, highly effective.”</i> • <i>“I can't remember what they called it but they had a campaign where they had people sign on as a supporter oras someone who was supportive of education and it wasorganizational, it wasn't individuals. So they went around to corporations and organizations and asked them to signthis document that they were in support of high quality education for all and it had some criteria. And I think they got a lot of awareness related to that and a lot of credibility by engaging organizations that wouldn't have otherwise been engaged in the issue.”</i>
<p>Examples of justification for “some”</p>	<ul style="list-style-type: none"> • <i>“I think it's kind of complicated. I think all of the organizations that are involved right now with Expect More are influenced by Expect More and were really already involved in education policy or advocacy at least at some level..... so they would continue to be whether there wasn't Expect More or not. The difference is that I think Expect More gives all of these sort of disparate organizations a chance to coalesce around certain issues, where there is agreement. And that gives us, I think, a better chance of moving the needle on those issues because we can be a little bit more coordinated and have one voice.”</i> • <i>“I have seen them be able to at times activate organizations like the Phoenix Chamber of Commerce, the Arizona Chamber of Commerce, Greater Phoenix Leadership and.....and get those groups to rally to support activities.”</i> • <i>“You know I'm thinking, I'm thinking to the business and foundation community again, especially I think the relationships of the previous CEO, President/CEO, I think were very effective in developing relationships that provided opportunities for her to better educate some of these thought leaders and policy influencers and leaders in the community.”</i>
<p>Examples of justification for “none”</p>	<ul style="list-style-type: none"> • <i>“When they were at their heyday they got, they were able to get people who would naturally be involved more involved, you know take them from a one-two to a maybe a five-sixbut to get somebody who wouldn't be involved I [have] hardly seen anybody do that.”</i>

How much evidence have you seen that Expect More Arizona’s work has increased the belief that <u>the whole education continuum matters</u> , including preschool, kindergarten through high school, and Higher Education?	
Examples of justification for “a lot”	<ul style="list-style-type: none"> • <i>“The P-20 Council was to link the systems between preschool, K-12, community college, higher ed to develop more of a seamless system. EMA picked that baton up and have been beating that drum for more than a decade. Our state is more aware of what P-20 means, we have nomenclature and words that express this now. EMA was a big trumpeter for this, educating the public on this.”</i> • <i>“Because of the Progress Meter . The progress is reflective of all of the key metrics in our education sector from birth to post-20, right? So when you have those metrics and those metrics are essentially your objectives and goals, it’s inevitable that they will impact them in a good way, the K-12 or I guess the P-20 sector.”</i> • <i>“I think the Progress Meter is a key piece of identifying a pipeline so no matter where you are in the education arena you probably fit on the Progress Meter , which makes clear that it’s at no one point that everything hinges on, that if you’re the ... preschool people you’ve got a place there, if you’re kindergarten readiness, if you’re third grade reading, if you’re eighth grade math, you know high school and they’ve done a really nice job of making people really understand that education is a pipeline and intervention at any one place is important but not sufficient to affect the whole pipeline; it’s bigger and more complicated.”</i> • <i>“Because they have huge noise in Arizona right now around K12 because of our teacher strike and they (EMA) are keeping the universities in the conversation and the early childhood in the conversation. So I think that’s important.”</i>
Examples of justification for “some”	<ul style="list-style-type: none"> • <i>“I think they are still missing the boat on higher education. But they have been doing a good job bringing the preschool early ed education stuff to K-12.”</i> • <i>“They have changed the perspective of the importance of education....so I think they've raised all boats. I'm not sure that people who think universities are most important have somehow suddenly come with the idea that kindergarten is just as important as universities....They have successfully raised all boats in education and education overall. They haven’t changed the individual perspective on what the most important piece of it is. So if the answer is, have they made people who were very focused on universities start to think about the whole continuum. Yes. Have they balanced it out so people have a broad, even view? Probably not.”</i>
Examples of justification for “none”	<ul style="list-style-type: none"> • <i>Well originally a lot. Now, none. Because now the groups are kind of fractioned off.</i>

How much evidence have you seen that Expect More Arizona affected education policy by working to make academic standards more rigorous throughout Arizona [through promoting standardized curriculum guidance and standardized testing for students]?	
Examples of justification for “a lot”	<ul style="list-style-type: none"> • <i>“They went out to their network and they got the people out to do those things, they went all the way from Yuma to Kingman and got groups to support the need for more rigorous standards. They rallied people to the Capitol when there was a threat of rolling back the standards. They've done a whole range of things in that space in terms of their networks, getting people to the legislature, going down to the legislature to advocate. Taking public positions to.... further the cause and make it clear why it's important ... doing TV spots on things like Horizon and Sunday morning political shows, local political shows”</i> • <i>“I think of the role they played there as a convener, communicator, and activator at critical timelines.”</i> • <i>“I think when we adopted the new standards, Expect More was very, very prominently engaged in trying to make people understand what the Common Core was and what the standards were and sort of negotiating that whole mess that was the adoption of new standards.”</i> • <i>“There was no question that they were the organization that mobilized a more practical approach to academic standards and certainly the alignment to curriculum and to assessment. And they continue to be engaged on those issues. They're just not as relevant in public policy conversations right now as they were a few years ago.”</i> • <i>“I think that is their crown jewel of work that they've done.”</i>
Examples of justification for “some”	<ul style="list-style-type: none"> • <i>“Certainly a player..... in and around the capital and with policymakers as all of that was happening. But at that time Expect More wasn't really doing any direct lobbying so there were limits on what organizationally they really could do.....they were a pieceof a coordinated strategy that hadthe grass roots sort of providing the foundation for the folks in the organizations that were doing the direct lobbying to build on. So, they were a key support I don't want to minimize what they did because they were a big piece of it....”</i> • <i>“I would say the Public Engagement Task Force that they developed around the Common Core and Arizona's new College and Career Ready Standards was important in terms of educating members of other organizations who aren't as closely linked to education about what those are and what they meant and why they were important.”</i> • <i>“I think you know it was a hotter topic in the legislature threefour years ago than it was most recently. I remember back then Expect More Arizona had a pretty vocal role. I don't necessarily mean that they came to testify in hearings. But I think there was a lot of information being provided by them.”</i>
Examples of justification for “none”	<ul style="list-style-type: none"> • <i>“I would say a lot back when that was, when that was the conversation, but nobody talks about that now.”</i>

How much evidence have you seen that Expect More Arizona affected education policy through work on the Proposition 123 campaign [to use land trust funds to finance public schools] (examples include raising awareness, outreach to communities)?	
Examples of justification for “a lot”	<ul style="list-style-type: none"> • <i>“They were part of the kind of umbrella group of organizations that helped drive the proposition forward. They took charge of much of the communications plans and implementation across the activity. They very specifically went after and rallied the education groups to support it and kind of set aside their reservations. And were part of the activated their grassroots network to support the activity.”</i> • <i>“I think the community organizing piece was a pretty critical piece. I think they made it very clear to the legislature where they stood on things or facilitated people letting the legislature know where they stood on things. I think they did a good job of ... doing the research behind it and showing the impact of Arizona funding with it and what it might look like without it.”</i> • <i>“They were one of the key partners to help with this effort. Along with a few other major influencers that are all working together, we all leverage each other. EMA are good at linking and leveraging other partners.”</i>
Examples of justification for “some”	<ul style="list-style-type: none"> • <i>“They provided some grassroots support down in Tucson, and you know definitely helped get the message out. I would say, in fairness that the majority of the work being done on that was the \$5,000,000 campaign that that was done, but there was... they definitely provided some support.</i> • <i>I mean they were active in the campaign. They mobilized their resources and their network. But it was a state-wide, a huge campaign; there were a lot of players. There was a lot of money that was put into that work and EMA was an important piece of that but I would not say they were a majority piece.</i> • <i>I think there were a lot of people that..... got behind..... that and they were one of many in the choir Again, I've largely seen Expect More as a provider of just really good, easy to digest information. So I think.... just the dissemination of that land trust is difficult to explain. So I think thatjust their ability to disseminate information in a way that people can understand it.</i> • <i>I think 123 had different organizations that were playing more prominent [roles], not because Expect More shouldn't but they weren't parties to the litigation and to the compromise and all of that. So I would say they certainly had 'some' but I think others had a different role and stronger role to play.</i>
Examples of justification for “none”	<ul style="list-style-type: none"> • <i>Prop. 123 was a settlement of a lawsuit and Expect More Arizona didn't have anything to do either with filing the lawsuit or insuring any part of the settlement and maybe encouraged people to pass it just as a matter of rubber stamping it.</i>

How much evidence have you seen that Expect More Arizona affected education policy through work on the recent extension of Proposition 301, which funds education through a sales tax [examples include raising awareness in the media, building urgency for 301’s extension]?

Examples of justification for “a lot”

- *“That was a unique example where there was some behind the scenes work that was being done, and then when there was an opportunity to publicly support the extension. I think EMA was the leader on that. And when they jumped on, I think others felt confident that they could do the same. So, I think they really helped change that dynamic down there because like I said I don't think anyone took it as a serious possibility....”*
- *“I know that their executive director..... was engaged in direct conversations with sponsors of the bill. She was vocal in talking to just stakeholders, K-12, community colleges, universities. I think that a lot of people in the business communities were a little wary of getting behind the extension of Prop 301 but Expect More I think always saw it as a positive and they were a consistent voice in getting it renewed.”*
- *“Pushing information out through their network and helping people understand the issue or the opportunity in ‘lay terms’ versus what the bills actually say. So they make it easy to understand the information and what it would mean to extend 301 and what it would mean to not extend 301.*

Examples of justification for “some”

- *“I don't think anyone played a very strong role in terms of the outside education advocacy groups because it was an inside baseball move.”*
- *“They created some really good infographics to show where those dollars are going and what would be lost.”*

Examples of justification for “none”

- *“I think it was going to go through anyway. I know they did an e-mail alert on it ... we all knew it was going to go through anyway so... I'm not sure in terms of influencing the outcome, whether any of us... like, that one we just went through the motions, I think.*
- *“I think that was a train that ran without them even though they were supportive of it. I don't think their influence had anything to do with it.”*
- *“There are definitely a group of full time, fully engaged, very informed education advocates and lobbyists who have been pushing on this foryears and years and years who I think were critical to getting that job done and I think Expect More probably rode along on that and supported it ... public verbally and in messaging. I don't have any sense that they were, that they contributed to the success of getting that passed.”*

How much evidence have you seen that the Progress Meter is a valuable contribution to education in Arizona?	
Examples of justification for “a lot”	<ul style="list-style-type: none"> • <i>“The work they're doing to drill down on how do we reach those goals is definitely shaping the conversations that are happening which is super important getting people focused on not just talking about doing the work but actually doing the work within our own organizations... So yeah... obviously I know the governor's office is using it and then we are... part of a group called the Arizona Early Childhood Alliance- AZECA, and it uses it. The governor's office was talking about the teacher part of it last week.”</i> • <i>“From basically all of your education associations to cities and towns, to your Board of Regents, State Board of Education, Department of Education, from philanthropy, everyone is using the Progress Meter to help guide their own strategies. I mean you say "Progress Meter " and people know what you're talking about and that's a pretty generic term so, I think that says a lot.”</i> • <i>“Getting other organizations entities and jurisdictions to focus on one or more of those Progress Meter s, enable us to get an untold number of people what those numbers should be, in setting goals – that was not easy. To get organizations to agree on these goals was huge – and EMA facilitated that.”</i> • <i>“I see people not affiliated with EMA reference the Progress Meter with great frequency. I know ABAEC (AZ business and education collation) has referenced this a lot, I've seen it in articles, I have been to conferences and meetings where organizations not affiliated reference it.”</i> • <i>“I think it's created consensus around what are critical indicators that matter for educational success. And I think it has ways in which that is expressed that it is increasingly utilized by policy makers as a framework, whether that's the state Board of Education or municipalities.”</i> • <i>“The Progress Meter has been a significant game changer. It's given structure and purpose and a de facto statewide education agenda.”</i> • <i>“I think that it hasbrought a lot of organizations together on the same page toward a common goal which is to increase the attainment of higher education, whether that's a four-year degree or a two-year trade and technical certification or an associate's degree or whatever it is. But, I think everybody is now focused on the set of things that will help deliver that ultimate attainment goal.”</i>
Examples of justification for “some”	<ul style="list-style-type: none"> • <i>“Common goals, it's just that simple there is now a common set of goals which people are acting upon and driving forward. So you've agreed on the objective. And that's very powerful, when you agree on an objective to try to get to the end point ... schools and cities have picked it up and have utilized it. I don't know if the legislators have done that or not.</i>
Examples of justification for “none”	<ul style="list-style-type: none"> • N/A

How much evidence have you seen that Expect More Arizona is a respected and trusted source for information on education issues?

Examples of justification for “a lot”

- *“I think they are trusted and respected when people know about them.Because they cite all of their information. They provide links and resources to kind of check and double check the information.”*
- *“Having the governor originally adopt the Progress Meter was a clear sign they were respected with what they brought to the table.”*
- *“I think that when people talk about a group that can convene other groups, a group that people want to go to for information, I think Expect More is probably top one or two that I've heard.”*
- *“When you talk to people inside the education debate, I think everybody acknowledges the role that Expect More plays and has respect for who they are and what they do.”*
- *“I think it's the quality of their staff they're viewed as experts in education policy. I also think that they're extremely collaborative and diplomatic. So they are able to bring people to the table to productively talk about issues in education and they don't alienate anybody I think they're highly trusted and credible....”*
- *“I think they're the ‘go to’... and I know people appreciate that... It doesn't matter which political background you are [from] ... because it's not sensationalized ... It's very balanced... And the facts and statistics ... it's not dramatized but it's really what's happening So, I think that they are the ‘go to people’ in looking for the facts.”*

Examples of justification for “some”

- *“I think that there is a trust in the grassroots, and kind of like ‘the rank and file folks’ as a trusted resource..... there was a lot of resistance from education organizations like the School Boards Association, the superintendents, the others... kind of ‘What is their angle?’ and making sure it was not contrary to what... kind of the membership education organizations do. And ... to me that is going to be a challenge for EMA as they move forward, as far as trusted source from the ‘rank and file’ kind of public but from the actual organizations... a lot of times they attend in order to kind of keep track of... rather than being bought in and vested in the message and ... the vision of Expect More.”*
- *“The people behind them are well respected so the organization is respected.”*
- *“I see that they get quoted and get on TV. They have a seat at almost every table which is important in terms of education confrontation. The reason it's not ‘a lot’ is because some of the block and tackle work at the state level they just can't do, as just a C3.”*
- *“That's a mixed bag I think more people trust it than don't but there are always some detractors I talk to folks all the time in the community that are connected to all of these issues and I don't know that Expect More can please everyone.... I heard earlier this week from a media person that Expect More is kind of like milktoast. meaning that they're not real hot or cold on a lot of issues; they're just sort of bare. And then I hear from other folks that you know Expect More as being more aggressive than they have been and that makes people uncomfortable.”*

How much evidence have you seen that Expect More Arizona influences business leaders, community leaders, and/or policymakers on education issues?

Examples of justification for “a lot”

- *“I think that that is probably a strong suit.I think it goes to what I mentioned earlier about the personal/professional relationships that the CEO has been able to develop with people within those communities. Not so much policy makers but definitely more so I would say a lot with business and community leaders and probably some with policymakers Policymakers typically go to people are subject matter experts in that policy area and business leaders, I think, and community leaders are more apt to listen to someone who is like them and that sort of the spot that I think Expect More fits into....”*
- *“It's evident on the board that they have at the state level, but also on our rural board... our local council is mostly... representatives of the U.S. Chamber of Commerce, human economic development, and business leaders, restaurant owners, people that understand that ... they need to voice the need for ... education funding and that we need to work on that together.*
- *"I've seen a lot of influence again with state leaders. I've seen far less at the local level."*

Examples of justification for “some”

- *“I absolutely think the potential is there and that it's likely happened. But I just can't tell you, like, this person changed their mind and this person was influenced. No I don't know.....Their strength has been in the grassroots stuff.”*
- *“We have all of those folks at the table but there are some key business leaders, for example, that are not. And I think sometimes, rather than EMA being the influence, sometimes the influences can be external so definitely have influence with some folks in the business community and policymakers but it's not universal.”*
- *“Expect More has a robust Advisory Board, Board of Directors, who are often influential stakeholders in business and throughout Arizona. And I would imagine that their investment to Expect More from a voluntary standpoint is correlating to their paid job their Board of Directors typically range and there are a lot of different sectors and they are influential and I believe that when they go back to their ... paid jobs with their current roles I expect that they use that information and that data to guide them in their work, in their profession.*
- *“...conversations with legislators, with appointed members of various boards and things like that ... Expect More is always in the conversation, if not at the highest level of decision making but they are in the mix as far as the conversations go.”*
- *“It really depends on the orientation of the person. Whether facts mean anything...”*
- *“They did before, but not sure they currently are. When Pearl was the director I saw this, but not much lately.”*