Freedom School Partners: Evaluating Impact

UNIVERSITY OF NORTH CAROLINA
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Freedom School Partners

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EXECUTIVE SUMMARY

Freedom School Partners (FSP) is a 501(c)(3) nonprofit that provides summer literacy enrichment for children in grades K-8 in Charlotte, North Carolina. FSP has expanded its partnerships with community organizations to include Charlotte Mecklenburg Schools (CMS), faith-based organizations, corporations, universities, and neighborhood associations since its startup year in 2009. Its mission is to promote "children's long-term success by preventing summer learning loss through igniting a passion for reading and inspiring a love of learning." The organization emphasizes believing in children to encourage children to believe in themselves. FSP asked UNC Charlotte Master's in Public Administration (MPA) Spring 2022 capstone class to review current data and research collective impact and to propose recommendations and opportunities to further demonstrate impact and expand the reach of the organization.

To accomplish the tasks of the project and provide recommendations for FSP, the team:
- Conducted a comprehensive literature review;
- Surveyed similar summer literacy programs;
- Evaluated similar benchmark programs;
- Conducted interviews with other summer literacy programs in Charlotte;
- Conducted interviews with other summer literacy programs around the country through the Children's Defense Fund Freedom Schools;
- Interviewed FSP external evaluators at UNC Charlotte.

The team proposes the following recommendations to bolster collective impact, increase funding opportunities, and procure long-term data:

Recommendation 1: Use Logic Model(s) to Tell the Story of Program Potential and Expected Outcomes

Freedom School Partners has already developed a robust theory of change which includes short-term and long-term outcomes. The next logical step is to measure the performance of those outcomes by identifying plausible indicators and the supporting data points to be collected. Freedom School Partners would benefit from using individual logic models for each of the four main focus areas (literacy, character, relationship, and leadership) which will support and guide program evaluation and impact storytelling.

A: Expand Survey for Parents/Caregivers to Capture Broader Impact

We recommend expanding on parent/caregiver surveys to include questions that measure collective impact. By asking the correct questions, FSP will learn how far their reach of collective impact is through the families they serve. FSP may also learn of ways to further their impact by the addition of programs or activities geared toward family involvement.

B: Create Student Leader Intern (SLI) Alumni Survey

Data from this survey would provide a way for Freedom School Partners to track outcomes for scholar and intern alumni. Then, Freedom School Partners would be able to analyze the long-term change it is making in the lives of community members, and determine the positive impact on the entire community.

C: Evaluate Social-Emotional Learning Internally

Using a scholar observation process will help Freedom School Partners identify and illustrate various social-emotional learning data points that are shown to improve adult well-being outcomes. This could provide an opportunity to demonstrate how Freedom School Partners is affecting public safety and educational outcomes.

D: Incorporate Charlotte-Mecklenburg Schools (CMS) Data

Under its current Memorandum of Understanding (MOU) with CMS, Freedom School Partners has access to robust data about program participants and their school performance. Access to this data can be beneficial in advancing other recommendations in the report including evaluation of social-emotional impact, reporting data on students with disabilities, and measuring educational impact beyond literacy scores.

Recommendation 2: Collaborate with Other Organizations to Measure the Collective Impact of Summer Learning Programs

Freedom School Partners could collaborate with and expand existing partnerships with other organizations in order to measure the collective impact of summer learning programs. The research gathered concerning collective impact makes clear the power of, but also the necessity of, intentional collaborations. To make large-scale change, collaborations are imperative and will enable Freedom School Partners to continue telling its story and measure broader impact.

Recommendation 3: Expand Organizational Capacity for Internal Evaluation

A: Internal Evaluator/Data Coordinator/MPA Fellow
Establishing the role of an internal evaluator would help FSP measure program outcomes and impact across surveys and data sources. Having a position within the organization with the focus of data will be beneficial in creating opportunities for more in-depth evaluation and analysis. This could be added as a full-time position open to all or with an interest in further expanding on the relationship with UNC Charlotte this would be a wonderful opportunity to create a fellowship opportunity.

B: Assume Data Stewardship
By strategically investing in evaluation capacity FSP can shift from doing good to creating an impact. Such investments are measured by the return that the investment brings long-term. Freedom School Partners should invest in program evaluation, take stewardship of their data, and build an evaluation culture.

Recommendation 4: Expand Organizational Capacity for Alumni Engagement

A: Establish Alumni Coordinator Role
Establish an Alumni Coordinator role, or assign similar job duties to a person on their staff currently, to actively work to engage with alumni within FSP. Past program participants can be supporters by returning to the organization later on as interns, and staff for summer programs.

B: Create Alumni Survey
The alumni survey will help lay a foundation for future investments and future generations of scholars. The primary purpose of this survey (Appendix B) is to understand better what impact FSP had on the past scholars.

Recommendation 5: Invest in a Large Scale Evaluation for a Longitudinal View of the Data

Freedom School Partners could invest in a large-scale evaluation to demonstrate the impact of the program. Two key areas of focus for Freedom School Partners are reporting and finding ways to tell its story better and understand their collective impact in the community. A large-scale evaluation study, such as a randomized field experiment, would provide evidence of program effectiveness to support and potentially expand program operations and funding opportunities.

Recommendation 6: Expand Organizational Capacity for Funding and Policy Opportunities

A: Expand Government/Corporate Relations Efforts
Freedom School Partners would benefit from expanding its organizational capacity for funding and policy opportunities. Government funding and policy decisions made at the local, state, and federal levels which affect Freedom School Partners create a revolving need for government advocacy. Freedom School Partners can expand their organizational capacity for funding and policy opportunities by establishing a position or adding to an existing position, various job duties that focus on Government and Corporate Affairs.

B: Expand Government/Private Grant Efforts
Freedom School Partners would benefit from reviewing, and applying for private and government grants to help their organization. Government grants are published on a revolving basis by government bodies creating a continued need for charitable organizations to review grant postings, and for grant applications to be submitted. Similar to government-backed grants, private companies regularly issue grants to charitable organizations for various reasons including expanding their own community impact, as well as corporate tax deductions. Freedom School Partners would benefit from seeking out and applying for these private grants. Private companies can donate funds and grants with fewer restrictions than government grants.

Recommendation 7: Monitor Data Surrounding Students with Disabilities to Expand Funding Opportunities

Freedom School Partners would benefit from tracking data surrounding students with disabilities in their programs, such as by incorporating the CMS data. Freedom School Partners would be able to use such data to become eligible for federal grants established by the U.S. Department of Education for students with disabilities. FSP could then apply for these grants and use the funds to help their organization in helping scholars with disabilities.

Recommendation 8: Expand into the Greater Charlotte Community

Freedom School Partners would benefit from working with a new local government or county school board to establish a single trial site in one of the counties surrounding Mecklenburg County. Freedom School Partners may receive more government funding and support by working with multiple municipalities. Each local government and school district has a different budget, leadership, and some municipalities may be more willing than others to establish a partnership with Freedom School Partners.

Recommendation 9: Expand Reach via Virtual Learning Options

Freedom School Partners should continue to offer virtual and distance learning education opportunities to reach children that do not attend in-person programs. Freedom School Partners should consider integrating additional virtual experiences, such as Google Classroom, to reach a broader audience with more flexibility and delivery of services.

Recommendation 10: Implement Overall Emergency Preparedness Program

Freedom School Partners should develop an Overall Continuity of Operations Base Plan to cover the entire program. Freedom School Partners can also use free training and informational resources provided by the Federal Emergency Management Agency. Freedom School Partners should also work with Charlotte Mecklenburg Schools to discuss procedures regarding emergencies within locations being used by FSP.

INTRODUCTION

Freedom School Partners (FSP) is a non-profit organization that promotes children's long-term success by preventing summer learning loss by creating a passion for reading and a love for learning. FSP fosters an environment where different cultures and diverse abilities are represented through an integrated reading curriculum. The mission is further supported through serving families and children who lack access to quality summer enrichment opportunities coupled with addressing the whole child by supporting their academic, social, and emotional needs. In 2004 FSP joined other community partners to begin six-week-long summer literacy programs called "Freedom Schools." Since then Freedom School Partners has continued to grow its partnerships and have expanded Freedom Schools across the City of Charlotte. In 2021 Freedom School Partners operated 10 locations, along with a virtual program serving 882 Scholars.

In January 2022, the Gerald G. Fox Master of Public Administration (MPA) Capstone class was selected to research and develop a comprehensive list of recommendations to help guide Freedom School Partners as they continue to expand as an organization. The main goals of the project are (1) to measure impact, (2) to analyze and report practices (3) to assess the external environment. The MPA Capstone Class also sought to better understand best practices from similar organizations, examine current evaluation practices, and gain awareness of externalities that are relevant to the Freedom School Partners.

The University of North Carolina at Charlotte MPA Capstone class has been tasked to examine how Freedom School Partners can measure collective impact, assess external threats and opportunities, and how to better tell their story. The team focused on these main questions when beginning our evaluation process:

- What is the broader impact of FSP work?
- How does the Freedom School experience impact the lives of scholars outside of their short time with them?
- What is the collective impact of the Freedom School experience, and how do they measure this impact year over year so it can be demonstrated effectively?
- Are there local, state, or national policies that threaten the FSP mission?

- Are there local, state, or national policies or initiatives that serve the FSP mission?
- What success measures can we capture to combat these threats and maximize these opportunities?

In analyzing and reporting best practices, it was important to first observe where Freedom School Partners is currently with their data by conducting an internal assessment. This method helped the MPA Capstone class compare their current survey methods to similar Freedom School Programs. The MPA Capstone class reached out to other Freedom Schools across the nation by first conducting an online survey and then participating in follow-up interviews to find different ways the industry conducts research how they report on the impact of the Freedom School program.

The MPA Capstone class also reports on local, state, and national policy implications that may affect FSP or create funding opportunities. This way, FSP will understand any external opportunities and threats that could be heading their way financially or strategically. The MPA Capstone Class then provides a number of recommendations to capitalize on existing opportunities.

LITERATURE REVIEW: COLLECTIVE IMPACT

The MPA Capstone class conducted a literature review to better understand the knowledge around collective impact and the role of children's literacy and summer learning within its context. To narrow the scope of our review, we focused on measuring collective impact, reviewing frameworks and evaluation models, and identifying relevant key indicators.

What is Collective Impact?

Collective impact is defined as the "intentional and structured coordination of important actors from different sectors to meet needs in a systemic, comprehensive manner" (Kania & Kramer, 2011, p. 37). Its origin stems from Kania and Kramer (2011) spotlighting the lack of significant system-wide progress within public education despite the dogged efforts of teachers, administrators, nonprofits, and billions of dollars in public and private funding. While acknowledging that many successes were found throughout their research, they emphasized that the impacts were isolated to individual teachers, schools or out-of-school learning programs and they lacked a necessary framework suitable for scaling. Positing that large-scale social change requires broad cross-sector coordination, the Kania and Kramer (2011) presented five collaboration conditions (Figure 1) necessary for implementing collective success.

Figure 1 | *Five Conditions of Collective Impact*

Building on this work, Brady and Juster (2016) put forth eight principles of practice (Figure 2) for implementing collective impact, which included engaging community members and placing a priority on equity.

Figure 2 | *Eight Principles of Practice*

In 2015, there were 182 cross-sector collaborations committed to using this framework and come together to work with early childhood providers, school systems, after school and summer learning programs, and postsecondary institutions to improve outcomes for children and youth (Riehl et al, 2019). These initiatives reflect a pattern of investment in local, place-based strategies to support young people and their families. Though the goals and objectives of these collaborations can vary in specificity, the overarching vision is to improve and sustain educational achievement.

How is Collective Impact Measured?

Spark Policy Institute (Spark) and ORS Impact (ORS) (2018) conducted an extensive cross-site study of 25 collective impact initiatives in the United States. The primary focus of the study was to answer the question of "*To what extent and under what conditions does the collective impact approach contribute to systems and population changes?*" (p.17). Researchers used a simplified theory of change model (Figure 3) to understand what kinds of changes were happening and the degree to which there was a relationship between collective impact and the outcomes.

Figure 3 | *Spark / ORS Impact Collective Impact Model*
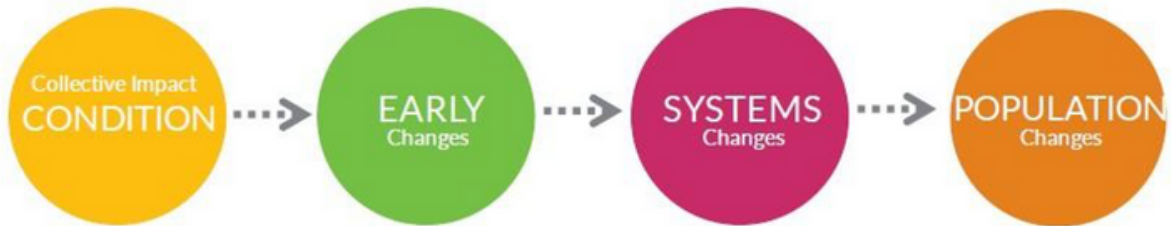
The most compelling findings relevant to FSP's work included:

- strong or compelling data linking expanded education programing to population changes (i.e. student achievement, social-emotional development, etc.);
- collective resource leveraging (i.e. public and private funding) linking to systems changes;
- stronger equity action leading to systems changes and then to population change; and
- emerging equity intent and meaningful representation and inclusion.

Additionally, all collective impact initiatives in the study (*N*=25) achieved a range of early changes that became meaningful to their contribution story. Frequent outcomes included:

- strengthening partnerships
- enhancing collaboration
- increased data availability
- increased capacity

Kania and Kramer (2011) found some overarching implications that may affect how collective impact is implemented and the outcomes it can achieve: the importance of the core foundational work to support long-term focus; not rushing to meet the five conditions, but invest thoughtfully, equity goes beyond achieving a set of outcomes, it requires intent and shifting power.

Kania and Kramer (2011) were explicit in the value of measurement and emphasized having a small but comprehensive set of indicators that would establish a common language to support the framework, measure progress aligned with the common agenda, encourage collaborative problem-solving, and develop a platform for an ongoing learning community (Hanleybrown et al., 2012).

In multiple recent studies, researchers examined student-level data needed from schools and out-of-school program providers in order to study the collective impact (McCombs et al., 2020; Reed & Aloe, 2020; Riehl et al., 2019). The key indicators that were relevant to FSP's work include school/program attendance, early grade reading, middle grade math, social emotional learning, discipline referrals, parent engagement, student experiences, high school graduation, college completion, and community engagement (Figure 4).

Figure 4 | *Key Indicators of Collective Impact*

Collective Impact
KEY INDICATORS

School/program attendance	Parent engagement
Early grade reading	Student experiences
Middle grade math	College completion
Social emotional learning	High school graduation
Discipline referrals	Community engagement

(McCombs et al, 2020; Reed & Aloe, 2020; Riehl et al., 2019)
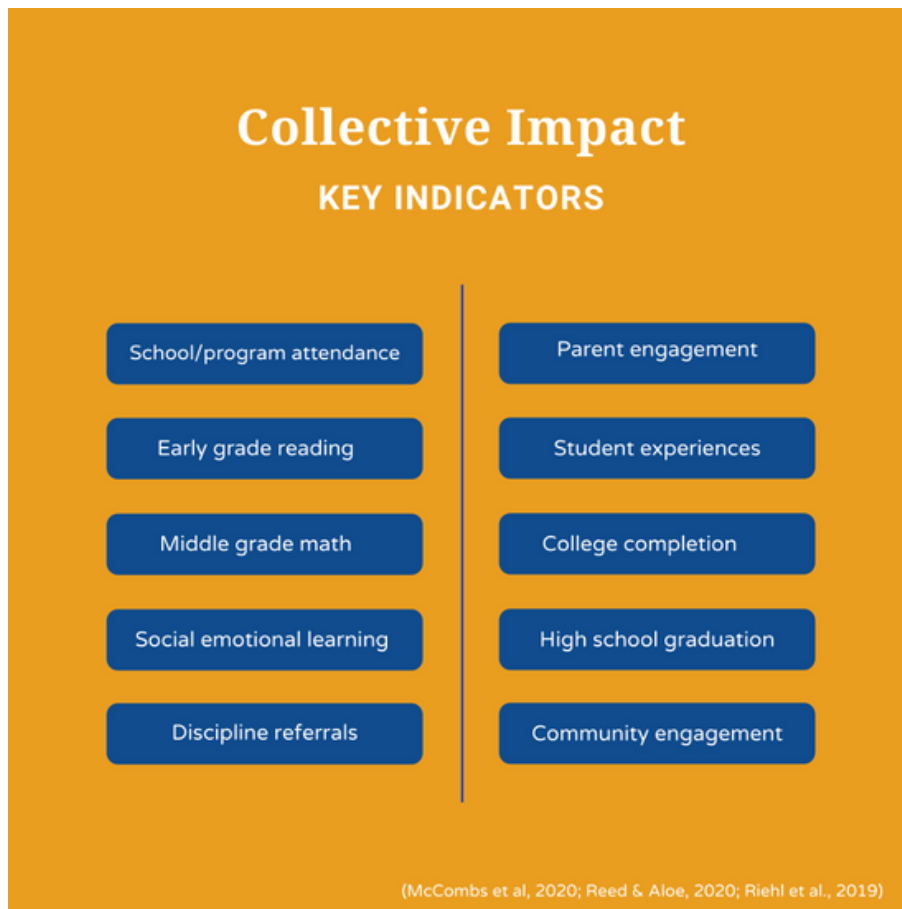
Modeling Collective Impact

Most contemporary cross-sector collaborations appear to adopt the comprehensive educational opportunity approach as their underlying educational theory (Henig et al., 2016). The approach is holistic. FSP, when looking at how to measure collective impact, should map out each stage of the process using time-based indicators, which also enables organizations to stay on track toward long-term goals.

Although there is no singular proper process to evaluate collective impact, there are some common, effective evaluation models and tools to provide guidance. StriveTogether is an organization that partners with nearly 70 communities nationally to carry out collective impact missions aimed at achieving racial and ethnic equity. It focuses on a "cradle-to-career" framework (Figure 5) that is founded on equitable principles and carried out through the lens of systemic change. The organization creates partnerships that are longitudinal in nature. These partnerships enable access to long-term data, which are then used to measure outcomes, track changes, progress, and develop strategies to address challenges.

Figure 5 | *Strive Cradle-To-Career Model*
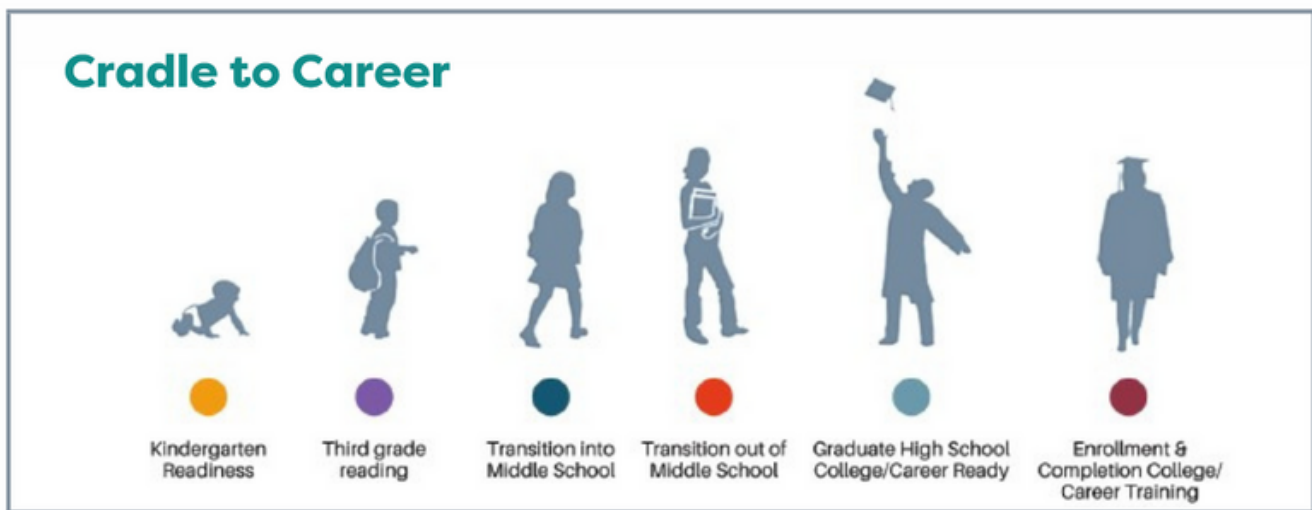
Serving as the foundation for this model, StriveTogether (2022) relies on the following system indicators to evaluate its cradle-to-career model:

- Race/ethnicity of teachers and administrators relative to the student body
- Teacher qualifications
- Culturally responsive curriculum
- Per-pupil funding
- Internet and computer/device access and technical support
- Accessible and equitable parental and community governance
- School climate/discipline
- Financial barriers to postsecondary enrollment
- Internship and mentorship opportunities/partnerships
- Local employer adoption of "family-centered" practices

In order to ensure that their work is producing the desired results, StriveTogether engaged in a three-year evaluation by Equal Measure, which is a consulting organization focused on helping clients elevate their evaluation practices to the next level. Through this process, Strive was able to confirm that its model is effective and leads to faster results. They encourage their partners to use this model as a guide while adapting it to their local context. The StriveTogether and Equal Measure report summarized the findings which highlighted that concentrating on improving shorter-term outcomes, such as test performance and parent engagement, is resulting in the establishment of civic infrastructure. That is, the necessary foundation for the desired long-term outcomes is being established through developing the short-term outcomes.

Additionally, they help community systems transform over time by laying out progressive milestones for organizations and programs to work towards. Then, by evaluating data using the chosen, uniform indicators, organizations can discover weaknesses, strengths, as well as opportunities for adjustments.

An example of this model in action took place in 2020, following the onset of the COVID-19 pandemic. Strive used data to address the digital divide that arose following the move to remote learning. For many children and families, a lack of reliable internet access acted as a barrier to daily learning. Communities and organizations collaborated with internet service providers to change policies and CARES Act funds to offer free or low-cost access to eligible families. Using data from the Child Equity Index, internet access maps, and insights from community members, Strive was able to help their networks link both quantitative and qualitative data to find solutions to the digital divide and ensure that children and families had access to the necessary resources to continue education (StriveTogether, 2022).

It is particularly challenging to track students through multiple schools and school districts, especially in a highly mobile sample: Although initially enrolled in 31 middle schools at pretest, students were surveyed in more than 200 different schools in Waves 5 and 6 when the students were in high school. Authors tracked students in each of the seven cities, identifying the schools (or cities) to which students had transferred. In several instances (especially for students who had moved outside of the district), this required soliciting information from school administrative assistants, teachers, or other students because, somewhat surprisingly, this information often was not available from the central district office or from computerized records.

These efforts of locating students, combined with multiple visits to individual schools (in some instances more than 10 trips to survey chronically truant students), contributed to the fact that they could survey virtually all the students still enrolled in schools in the original districts. The authors obtained permission from principals at each of the new schools to survey the transfer students, an effort intense in both time and labor, but one well worth achieving these high response rates.

Out-of-school programs for grade K-12 students support healthy behaviors, boost academic achievement, and strengthen social networks. (Enns et al., 2018) Researchers wanted to understand how the programs influenced students' health, educational and social outcomes long-term. Researchers analyzed the association between participation in out-of-school programs using the individual-level data. Researchers found positive connections with lowering grade repetition, improving high school graduation rates and improving enrollment in post-secondary institutions. (Enns et al., 2018) Ongoing analyses examine how participating in summer programs can be linked to improved educational and social outcomes. Findings suggest that engagement in an out-of-school summer programs like FSP contribute to better educational outcomes for low-income students.

INTERNAL SURVEY ANALYSIS

FSP regularly collects survey data from parents, partners, site coordinators, and new and returning Servant Leader Interns (SLIs). The survey data collected by FSP does an excellent job at uncovering issues within SLI and site coordinator training, identifying activities that were beneficial to the scholar's literacy, and gauging respondents' overall satisfaction. Major takeaways from the survey analysis are the understanding of respondent attitudes.

Overall, the surveys FSP distributes to collect feedback from new SLIs, returning SLIs, site coordinators, and parents fit an overall theme of observing and focusing on internal observations during that program's year. Because the data is collected annually, FSP is able to better assess its overall program and can easily make adjustments, as needed. The MPA Capstone Class analyzed the internally collected survey data to better understand participants' feelings, how they related to collective impact, and COVID response.

Parent Surveys

FSP had 88 responses to their Parent/Guardian Survey in 2021.

- Part 1 asks for general feedback from parents about which site scholars attended, confidence and love of reading, and the likelihood of parents volunteering in the upcoming school year.
- Part 2 indicates parent's satisfaction with FSP's staff and multiple open-ended questions where parents shared thoughts on field trips, activities, supporting scholars and FSP's impact on their children. Many comments contain success stories and improvements seen in children after completing a summer with FSP. Parents praise the work FSP is doing but wish to see more "field trips and off-site activities," and "age-based activities." Stories of "increased confidence" by students and "positive role models" flood the comment section. Constructive comments are typically COVID related and revolve around asking for more programs and services from FSP.

- Part 3 asks parents about FSP Connect. The majority of respondents (89.9%) used this program to register their child with FSP and 63 respondents felt it was extremely easy to use. However, most respondents (55.7%) did not utilize FSP Connect to check afternoon activities and 26.1% did not update their child's information after signing up.
- Part 4 indicates continuing Freedom School yields positive results about scholars having enjoyed the program and planning to return next summer. Closing comments of the parent survey report what a "wonderful program," and "great experience," FSP offers.

Overall, responses from this survey generate feelings that parents are happy with FSP's services and are more likely to become involved in their child's school and with hands-on education. Survey data gathered from parents can also be beneficial in reporting why parents re-enroll their children in FSP's program or why they do not. This information would reflect overall interest and satisfaction with FSP's offerings.

Partner Surveys

FSP works with multiple partners to deliver their services during the summer. Charlotte Lab, Christ Lutheran Church, The Grove, Shalom Park, University City (2 entries), and Providence Day used the survey to communicate their satisfaction in working with FSP. This survey relied heavily on a 5-point scale; 1: Very Dissatisfied; 2: Dissatisfied; 3: Neither Dissatisfied or Satisfied; 4: Satisfied; 5: Very Satisfied. Graphs are included to quickly convey each organization's response rating to various categories.

- Part 1: FSP Support illustrates partner organizations generally felt neutral or satisfied with FSP's support. Comments are a mix of positive and negative, mostly discussing how "more and detailed information/communication" and greater staff involvement.
- Part 2: Site Logistics of the partner survey yielded mixed rankings. Partner organizations found the volunteer hub "hard to use," or did not use it at all.
- Part 3: Site Staff indicates that all partner organizations were either satisfied or very satisfied with the Site Coordinator and SLIs. Positive comments about staff energy and organization demonstrated staff "dedication to the scholars [in] helping them have the absolute best experience possible."
- Part 4: Partner Experience again generates responses of neutral or satisfied feelings. FSP used this section of the partner survey to gauge the best days and times to hold meetings with their partner organizations.

Overall, the Partner Survey Feedback from 2021 provides FSP with information about how to better interact with external organization connections. Opportunities for free responses from the organizations provide positive and negative comments about how FSP can better work with their partner organizations. Feedback gathered from the partner surveys will best provide insight on how FSP can improve and build external relationships.

Site Coordinator Surveys

Survey responses were gathered from 11 FSP Site Coordinators.

- Part 1: Site Coordinator Opinions uses a 5-point scale to measure responses to questions on perceptions of scholar confidence, feeling supported, feeling comfortable, and successfully working as a team. The biggest takeaway of this section comes from the question asking respondents to rank how comfortable they felt giving feedback to their regional site manager. While 8 respondents gave a score of 5=strongly agree, 1 respondent agreed, 1 respondent felt neutral, and 1 respondent disagreed with the statement.
- Part 2: Programming Feedback consisted of open response questions. Some key points of this section are that respondents felt prepared to begin working with FSP "given the circumstances with COVID." Continuation of in-depth planning and timely organization is likely to increase feelings of preparedness in future summers. Respondents built "lifelong connections," and "relationships with scholars and staff," giving the feeling of a "family community." This entire section contains feedback that can help FSP identify any shortcomings and successes of Site Coordinators. Based on survey results, 90.9% of respondents would work the FSP again.
- Part 3: This part of the survey found Positive feedback on bus drivers. Results of this section indicate positive feelings and friendly interactions between bus drivers and Site Coordinators.
- Part 4: Scholar feedback contains one free-response question on scholar evaluations.
- Part 5: Much can be learned from this part with regard to FSP Connect. Rankings indicated some Site Coordinators experienced issues with the system and needed more information. Comments overall ask for more information about scholars, such as their "birthday, a picture, or other important information." Respondents liked FSP Connect but would like it to include more information and offer an edit option for better use. Comments from Part 6: Site Partner Feedback indicates that site partners did an "amazing" job working with Site Coordinators. Site partners "provided a lot of resources," and "brought snacks," and supplies "in a timely manner." The final part of this survey allowed respondents to leave any final remarks that were not touched on by previous questions.

The multitude of open-response survey questions allows for FSP to gain greater in-depth feedback from respondents. Site Coordinators frequently left lengthy responses when relevant to their experiences, offering up information for FSP to use in future planning. Information from these surveys convey respondents' feelings on FSP. FSP can use this information for employee retention purposes.

Servant Leader Intern Surveys

Two surveys were distributed to Servant Leader Interns (SLIs), one for new SLIs and one for returning SLIs. The survey distributed to returning SLIs had 72 respondents, while the returning survey had 13 respondents.

In the survey for New SLIs, background information is gathered about each respondent. The SLI survey questions emulated questions from the Site Coordinator survey, gathering opinions on the confidence of scholars, comfort level, and support received. New SLIs shared how their team environment "highlighted each other's strengths," and "meshed well together." Feedback about working with others is positive and in-depth, demonstrating how FSP has worked to tailor a staff that will create the best environment for its program. Positive comments about team members "who went above and beyond to contribute to [a] site and what that looked like," reassure FSP that its staff is dedicated to its mission and each other. However, FSP also takes the opportunity for New SLIs to identify when a team member "did NOT go above and beyond." This information helps identify pitfalls and obstacles faced by staff, although many of the comments simply indicate that "everyone went above and beyond," at the majority of FSP sites. The Training Feedback portion of the survey yielded results that some New SLIs felt they lacked adequate training to carry out their role successfully. Multiple comments ask for FSP to offer "more specific" and "off-site" training to better prepare New SLIs. One respondent suggests that training should include "more practice and technique regarding classroom management." FSP can use this feedback to integrate new and additional training for next year's New SLIs.

Returning Servant Leader Intern surveys were answered by 13 participants. This survey is laid out similarly to the New SLIs survey. The purpose of the first part is to gather background information on respondents. The Survey asks returning SLIs for their opinions on the confidence of scholars, comfort level, and support received. Results are similar to that of the New SLI survey, yielding agreeable results for all questions. Comments were positive overall and did not offer many suggestions for changes or improvements FSP could make. As in the previous survey, the majority of respondents did not recall a staff member who "did NOT go above and beyond in contributing," to individual sites. The Survey is used to evaluate how adequately trained interns felt during a returning summer. Another section of this survey asked "Do you think in-town and CDF national training did an adequate job of training first-year interns". Responses in this part were varied, ranging from strongly disagreeing to strongly agreeing for multiple questions. The biggest takeaway from this survey is that respondents felt they needed more training to adequately carry out their job duties. Comments indicate "Training was not as comprehensive as it has been in the past," and that "virtual training was just not the best because we were not able to experience hands-on training." Many comments referenced COVID-19 as the cause for the training circumstances. Additional sections asking for positive experiences and success stories help demonstrate the work being done by FSP to prevent summer learning loss and confirm the benefits of its programs.

The questions asked in the SLI surveys convey the attitudes of new and returning servant leader interns toward certain topics, such as "My future is bright '' or "I intend to volunteer in some way to help people throughout my life" had improved through their experience of working at FSP for the summer. Out of the eight questions asked regarding attitude improvement, all eight questions had a positive response rate of 65% or higher. Understanding how FSP impacts the lives of Servant Leader Interns is essential to measuring the overall collective impact of the program. By interpreting the results, FSP can develop initiatives that will continue to improve their relationships with the SLIs and can be altered to better fit with the desired results in areas that aren't as positive as FSP would like it to be.

COVID Response

An internal analysis of all FSP response surveys was conducted to document the implications COVID-19 had on FSP's operations. COVID-19 and the years following have greatly shifted how educational programs are offered and operate. FSP made major strides to support the education of their scholars and enforce public health.

During the first COVID outbreak in 2020, FSP was forced to rethink its internal operations. FSP is largely focused on their scholars, and they also needed to create an environment that was supportive of employees and volunteers. FSP regularly gathers feedback data from parents, partners, and employees to gauge their operations and identify any pitfalls. Across all affiliations, respondents felt that COVID hindered the success and operability of summer 2021 programs. One Site Coordinator claimed it was a challenge "stay abreast with COVID guidelines, expectations, and transportation challenges." Another cites difficulty in carrying out afternoon activities, having families fill out the daily health screener, and not allowing families to be present at the end of the summer finale. Another Site Coordinator commented that there "should be some form of relief for the interns so that the burn-out sensation is not reached as quickly." Overall, Site Coordinators felt they needed more consistency that was "lacking due to COVID."

Similar comments can be found in the surveys from returning Servant Leader Interns and Parent Survey responses. The staff was "unable to have a traditional training experience, leaving first-years unprepared," according to the returning staff. Suggestions via Returning Servant Leader Intern responses indicated that in-person meet-ups and team building would have produced a more successful experience. Parents have viewed recent summer programs as a "test experience" given the "COVID style" of activities and operations of FSP. Parent surveys contained many comments about the limited number of "field trips for afternoon activities" and limited options offered in general, giving a general feeling that FSP will have "more field trips post-COVID." However, given the ongoing nature of Coronavirus, FSP has been adapting and altering its programs to reflect the global climate and protect the health of its staff and scholars. One parent does condone the work FSP has been doing to stay active during COVID, leaving the story of Madison a new scholar enjoying the summer activities that were still available.

"Madison was a new student from NYC, due to COVID she lost the love of learning and desire to be a part of the school. She learned virtually for a year and a half but when she Started [attending] Freedom School, she was eager every morning to get to school and see her friends and teachers. Madison is more eager to start school in the fall and is starting to become more confident in making new friends."

While respondent surveys distributed by FSP frequently blamed COVID for a lack of preparedness, consistency, and enjoyment typically found with their summer offerings, the organization is still adapting to a new learning environment. While COVID protocol has been "strict" and "challenging," FSP took steps to alter its program offerings to best support the health and education of its staff and scholars. In the New SLI survey responses, it

was commented that FSP was able to "provide hands-on experience to future teachers," and expose interns to a classroom setting. Respondents "hope to see a normal school year soon." FSP's swift response to meet COVID-19 guidelines set in place by the government in 2019 allowed their program to continue in a new environment. As the pandemic has continued, they slowly moved back to pre-pandemic offerings and decreased their virtual and socially distanced offerings.

FSP may wish to reinstate virtual and distance education delivery so that they may reach the most scholars possible. FSP can also implement new tools for distance education purposes. Information on alternative options can be found in recommendation 9, found later in the report.

UNCC CEME/CAL Evaluation Reports

In conjunction with the strong foundation in internal evaluation, FSP continues to build strength and validity in the Freedom School program through a more than ten-year external partnership with UNC Charlotte's Center For Adolescent Literacies and, since 2018, collaborating with the Center for Educational Measurement and Evaluation.

Program evaluation began in 2009 with a pilot study when FSP approached the Institute for Social Capital to conduct an external evaluation on the impact on scholars in the program. In the initial pilot, 69 students from grades 2-8 were evaluated, and the results showed a 60% increase in the reading level of years' growth. With that preliminary result, in 2010, CAL continued to expand on the pilot study, further gathering impact information on scholars. This expanded evaluation included longer-term research that included multiple freedom schools over three years, 2010 through 2013, that had significant positive results on the impact of 416 scholars (Lara-Cinisomo, Taylor & Medina, 2020). In 2018, with a continued desire to evaluate the program and its participants, the CAL and CEME began collaborating to expand the evaluation to include SLI's for evaluation of both qualitative and quantitative data.

Year-over-year, the evaluation from UNC Charlotte has seen a consistently positive impact on scholar participants and SLI's. Their reports are a quasi-experiment without a control group. They are conducting a pretest in the first week of the program and a post-test in the program's final week. The success of this evaluation with corresponding reports has provided continued support for the program's positive impact initially with scholars and the addition of SLI's in 2018.

Internal Survey Takeaways

Overall, the surveys FSP uses to collect feedback from new SLIs, returning SLIs, site coordinators, and parents fit an overall theme of observing and focusing on internal observations during that program's year. The surveys do an excellent job at uncovering opportunities and successes within SLI and site coordinator training, identifying beneficial activities in scholar literacy, and gauging respondents' overall satisfaction. The main takeaway from the new and returning SLIs surveys was Part Six of the SLI's' attitudes. Understanding how FSP impacts the experiences of SLIs is an essential indicator for measuring collective impact.

While reviewing the parent survey, the MPA Capstone Class noted that respondents did not answer the initial questions. Specifically, when parents were asked what the program could do better, most of the responses were positive reviews, which gave no real insight into the program. Another takeaway from the parent survey was that many parents were not interested in joining the advisory board. This hesitancy is an indication that further investigation is warranted, as parental engagement is an important element for FSP as a program provider and its collective impact. Lastly, while reviewing the partners' survey, we noted that a significant majority of the volunteer portal responses had a neutral rating. The MPA Capstone Class viewed this as an opportunity to examine volunteer recruitment and engagement, and how FSP could improve this aspect of the program.

SOCIAL-EMOTIONAL LEARNING OUTCOMES

The following section looks at social-emotional learning (SEL) outcomes. FSP may find an opportunity in strategically strengthening their SEL focus while meeting heightened emotional and relational needs of scholars.

SEL and COVID-19

According to Mulholland (2021), social-emotional learning "involves the processes by which people acquire and effectively apply the knowledge, attitudes, and skills to understand and manage their emotions, to feel and show empathy for others, to establish and achieve positive goals, to develop and maintain positive relationships, and to make responsible decisions" (p.139). Following the COVID-19 pandemic, many children have experienced heightened stress, isolation, and various traumas (Mulholland 2021; Shah et al. 2020). As a result, children in educational settings may struggle more emotionally and/or behaviorally to focus, learn, and interact with others. FSP evaluates some SEL components in its UNC Charlotte CEME external evaluation. Both scholars and SLIs are surveyed and some are asked about younger scholars are asked about two SEL outcomes while older scholars and SLIs are asked about an additional two outcomes. Additionally, some responses from the scholars and Servant Leader Interns reported behavioral concerns citing some bullying and fighting between the scholars taking place during the program. In light of this, there is an opportunity for FSP to gather internal SEL data to monitor and address heightened emotional needs in scholars.

SEL and Collective Impact

Data are showing that future outcomes can be positively impacted through targeted social-emotional learning (SEL) components. Many organizations are emphasizing evaluating SEL because there is strong evidence that it predicts outcomes such as graduating high school on time, obtaining a college degree, and becoming a productive member of society (McCombs et al. 2019; Schonert-Reichl 2017).

Extensive research has been done supporting the notion that social-emotional skill development can lead to positive academic, social, and mental health outcomes (Jones et al., 2019; Moffitt et al., 2011). In this sense, outcomes can be tied to collective impact outcomes, focusing on the broader societal impact resulting from short-term SEL outcomes.

Summer learning programs support social-emotional well-being gains and interventions through summer learning programs (McCombs et al., 2020). For example, the National Summer Learning Project, which offers a summer academic enrichment program offered in multiple urban settings to youth spanning over five to six weeks, conducted a randomized controlled trial comparing program participants to a control group with over 19 years of data collection, youth in the treatment group who also held high attendance rates were rated higher by their teachers in social-emotional learning (McCombs et al., 2020).

While FSP involves SEL outcomes in their curriculum, there is an opportunity to expand this evaluation to compound positive effects through an equitable lens, while also being able to track and refer to SEL data internally instead of externally.

EXTERNAL ANALYSIS

The MPA Capstone Class created a nationwide survey geared toward organizations similar to FSP as a summer literacy program, an educational program, or part of the Child Defense Fund network. The survey consisted of 35 questions regarding best practices and resiliency, and was conducted online using Qualtrics. The survey included multiple-choice and open-ended questions. The purpose of the survey was to understand what practices and methods similar organizations are using to achieve their goals, and then use that information to develop recommendations for FSP.

The survey was distributed to 115 organizations and acquired 28 respondents. The responses offered valuable insights that present multiple opportunities for FSP from which to learn but also confirmed that FSP is on par with other similar organizations and even ahead of the curve in some areas. The survey questions and responses can be found in full in Appendix C.

Survey Summary

Program pre-test scores and exit/post-test scores are the most commonly collected participant outcomes. Qualitatively, participants and program staff were the most common sources of information in terms of student outcomes. Qualitative data is most commonly collected via stories, comments, and anecdotes from the program staff and participants. Parents provided qualitative data/feedback for most organizations as well.

Most organizations do not collect participant data after program completion. Most organizations collect and track information about volunteers and/or interns that are involved with their organization. A slight majority of respondents indicated that they are "content" with the data and information that their organization is collecting. It remains a bit unclear if this is by "choice," limits in evaluation, or some other factor.

Among those organizations that wish to capture more, a primary hindrance was school collaboration. Data were collected mostly from participants, then parents, and then schools. All organizations who responded to the question reported at least a moderate involvement with the surrounding community. Collective impact is very important for all

organizations and their funders. A slight majority of respondents reported that data is processed by internal and external actors. Organizations were relatively split on how information and reports were shared externally via a website or via emails (Figure 6).

Figure 6 | *Survey Respondents - Collective Impact*
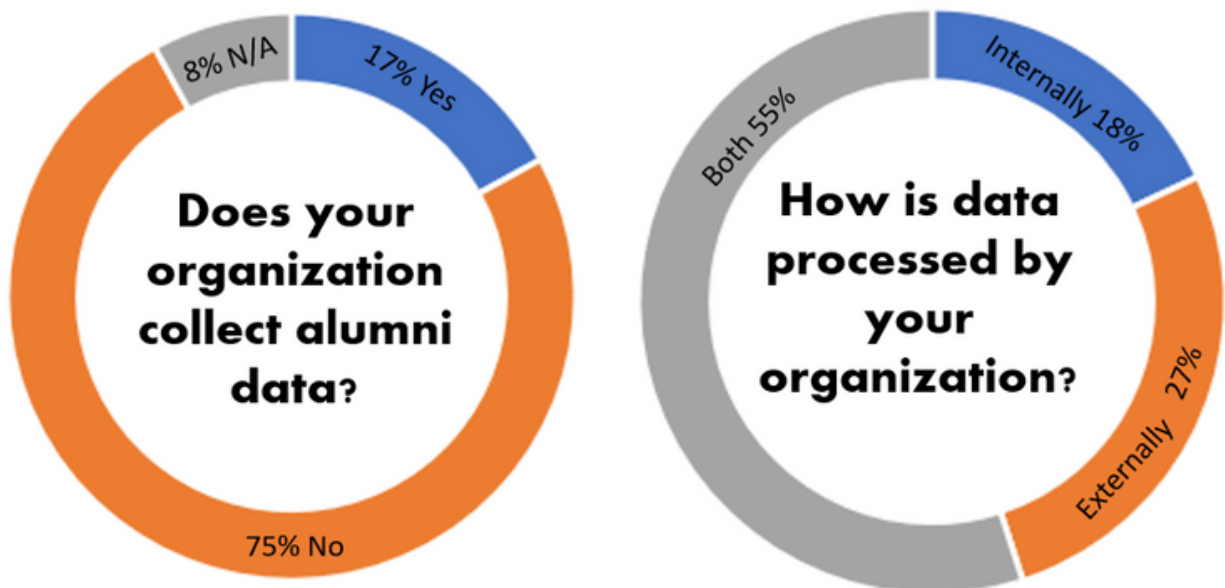
Related to participants and learning outcomes, respondents shared that they noticed changes in their students due to the coronavirus pandemic. There were reports of lowered motivation, increased behavioral and social challenges, low engagement, and a decline in academic achievement. One respondent noted that their participants who were already grade levels behind in school were only set back further due to the pandemic and the challenges associated with it. Additionally, organizations shared concerns regarding funding, limited capacity, emergency operations due to the coronavirus pandemic, and evaluation opportunities.

As for FSP, academic evaluations demonstrated gains even during the pandemic. While many organizations value feedback from stakeholders and funders, few have actual stakeholder surveys like FSP. In terms of stakeholder involvement and also having a holistic "curriculum" integrated through the program, Freedom School Partners appears to be a leader in this area as compared to those organizations who responded to our survey. Including this qualitative data within their overall impact story can legitimize and highlight the role FSP serves in both the Charlotte community, as well as the industry sector. Full text of the questions, responses, and results are listed in Appendix C at the end of this document.

INTERNAL & EXTERNAL INTERVIEWS

Interview Methodology

In order to better understand the external environment surrounding nonprofits that handle children's literacy summer programs, The MPA Capstone Class reached out to a variety of summer programs both locally and nationally and conducted interviews to understand trends, issues, and expectations facing organizations at both the local and national levels.

Locally the MPA Capstone Class conducted interviews with the following organizations:
- UNC Charlotte CEME/CAL
- UNC Charlotte Urban Institute
- YMCA Y Readers
- Read Charlotte

With the external survey closed the MPA Capstone Class reached out to eight organizations, who responded to the online survey, for follow-up interviews. The primary reason for the reaching out these eight organizations is their response to collective impact. These organization indicated either a desire to measure collective impact or were already measuring collective impact in some capacity. Secondary reasons organizations were selected is if they provided good qualitative information or if quotes or comments stood out to the data analysis team.

Three organizations agreed to speak with us and we conducted interviews with the following:
- The Peter Spencer Family Life Foundation in Wilmington, Delaware
- LifeWise STL St. in Louis, Missouri
- CDF Freedom Schools of Licking County in Licking County, Ohio

Local Interviews

UNC Charlotte CEME/CAL
The MPA Capstone Class conducted a joint interview with the UNC Charlotte Center for Educational Measurement and Evaluation (CEME) and the Center for Adolescent Literacies (CAL). Speaking to Dr. Richard Lampert, Director of CEME, Bryndle Bottoms, PhD student and Dr. Bruce Taylor, Director of CAL. As a department they conduct evaluation in the early childhood education space. They have conducted the external evaluation for Freedom School Partners since 2009.

The evaluation they conduct includes data collection and analysis through surveys for Scholars and Servant Leader Interns on their self-reported experience to give FSP formative feedback on their program. CEME looks specifically at the affective side and perceptions of the program through the servant leader lens. CAL looks specifically at the literacy side of the program. Year-over-year they have continued to see a trend in results that has been consistent in feedback.

They find a lot of the success of the program has a lot to do with the CDF Freedom School Model that includes culturally diverse materials using an integrated reading curriculum. Includes engagement in a way scholars may not otherwise be getting in a traditional year-round classroom. That success is attributed to things other than literacy during the 6-week program that can also be attributed to the CDF Freedom School model and the approach. The approach focuses on what the program can do for the scholar they have a say in the process vs. traditional school where students are doing what others say they have to. This program is about what they can do for the scholar. They incorporate so many components like the Harambee and discussions about the reading.

UNC Charlotte Urban Institute
The MPA Capstone Class spoke with Sydney Idzikowski, a data and research coordinator at the Urban Institute at UNC Charlotte specializing in community impact, to better understand collective/community impact. She explained that the functional difference between collective impact and community impact is primarily the actors involved. Collective impact measures the impact of coordinated agents in a model of change whereas community impact generally refers to the impact on members of the community independent of the actors involved in making change. That said, she emphasized the value of contextual definitions in reporting. Meaning that as long as terms are defined and fit well inside of an evaluation framework there is some room for subjectivity.

When looking at collective/community impact the concept is going to need to be clearly defined by the organization during the creation of logic models that will be used in evaluation reports. Indicators should be grounded in the context of the geographical location at a certain moment in time. Measuring collective/community impact takes time and will usually be defined over the course of five or more years. This point emphasizes the importance of internalized data storage and analyses for the sake of longitudinal measurements.

Speaking with the Urban Institute shed a light on the fact organizations will also have to determine how they will evaluate pandemic years. In the view of the Urban Institute there are two main options 1. evaluating the last two years as a way of looking at how the pandemic has actively changed how summer learning can change or 2. evaluating COVID as an outlier. A theme for most organizations was that this would be evaluated as a stand-alone period of time.

YMCA Y Readers
Y Readers is a local summer literacy program through the YMCA of Greater Charlotte. Charlotte Y Readers is a similar program in many ways to FSP. During our conversation we discussed many of the areas in which the peer organizations interact on a thoughtful level on planning, for example they have spoken and, in some cases, figured out overlap so both organizations are able to help the most children. Y Readers and FSP have started a relationship and understand that in order to make sure they have the opportunity to serve the most vulnerable communities they must work together. Amanda Wilkinson is working toward continuing to build on the relationship with FSP.

Read Charlotte
Madison Hanakahi, the Data Coordinator for Read Charlotte, highlighted Read Charlotte's focus on child literacy. The organization of Read Charlotte's is considered an organization that is business to business with the sole purpose of improving child literacy by understanding what programs work and do not work. The purpose of this interview is to get a better insight on the entire evaluation process for nonprofits handling children's literacy.

The organization handles impact on an individual with students by either conducting a reading checkup or using the Assessment to Instruction (A2i) to help follow students' progress throughout the school year. The main focuses are classroom instruction, evidence-based tutoring, family empowerment and summer learning.

External Interviews

The Peter Spencer Family Life Foundation, Wilmington, Delaware

The Peter Spencer Family Life Foundation (PSFLF) is a community development project of the Mother African Union Church. It is a 501(c)3 non-profit organization, incorporated in 1999. The purpose of the organization is to develop and implement specific programs that address the need to build a positive self-concept in the African American Community, particularly in the lives of children and youth. PSFLF is a resource to the community that offers innovative programs that revolve around themes of building pride, self-concept, and self-esteem both individually and as a collective community. It also develops and implements programs to enhance the quality of life.

We spoke to Fran Livingston, Executive Director of the Foundation. They began Freedom School in 2013 and since then have seen consistent results throughout the last 9 years. This was the first interview that spoke to how much they rely on CDF for all of their evaluation processes and analysis. They have evaluators that come to and conduct and manage the evaluation of the program. As an organization they have seen growth since 2013 but interestingly they have not only created more sites within their organization but have now fostered partnerships with other organizations to start Freedom School programs to build more opportunities for partnerships in the state without having to manage those sites directly. Ms. Livingston also spoke about how they use the model to motivate scholars that if they can motivate the scholars to participate the rest will follow. That motivation will build on each component to create an environment for success.

LifeWise StL, St. Louis, Missouri

The mission of LifeWise StL "is to help individuals and families achieve economic well-being by providing high-impact, relationship-based programming and by addressing systemic barriers to their success." LifeWise wants to impact the whole person from baby to senior citizen and they have programs that involve every age group along the way. Create a space for a person to have the tools necessary to get them out of poverty.

CDF Freedom Schools of Licking County, Licking County, Ohio

The MPA Capstone Class spoke with Eva Marie Wolfe who is the executive director of the organization. In 2012 they began the process of starting a Freedom School. They currently have 3 sites and are planning on serving 130 scholars this year. They rely heavily on CDF for training as well as evaluation. They serve a predominantly white demographic in a rural community which is an anomaly amongst the Freedom Schools in the network. One very interesting point was they just hired a grant writer to join their team. They also acknowledged that FSP is well known in the network for being a model organization. Ms.

Wolfe suggested they begin to share data and information amongst all the Freedom School network. As she put it, "We are not competing for scholars or anything" we might as share information to help propel the mission of literacy forward.

Final Interview Take-Aways

The interview focus stemmed from our initial presentation and follow-up interview with FSP. There was much discussion around creating opportunities for measuring collective impact to better tell their story.

One of FSP's goals is to improve their evaluation process and better understand their data. This was a common challenge cited in the interviews. Evaluation takes time, funding, and therefore capacity. When asked about the necessities of effective evaluation, most interviewees acknowledged the importance of having short-term, mid-term, and long-term indicators and outcomes in order to successfully tell the organization's story. Another common theme was the importance of designing a longitudinal evaluation plan to be able to show funders. In order to be able to measure and evaluate collective impact, data will have to be linear and consistent. Following the COVID-19 pandemic, some organizations are placing a heavier emphasis on evaluating Social-Emotional Learning (SEL), as well as evaluating through an equitable lens by contextualizing the data.

Each organization or entity we interviewed had a slightly different perspective or understanding of collective impact and how to measure it. The interviews with each one highlighted a few key themes relevant to FSP and how they can understand and better measure collective impact. One key theme was understanding and answering the question: what is "collective impact'' for FSP? The Urban Institute discussed how there needs to be a plan in place and how that plan has to begin with defining what collective impact is to FSP. These questions could be answered in a variety of ways: the organization looking externally for impact or internally through the programs it creates and implements. Once that question has been asked and answered the next step would be clearly defining using something like a logic model to clearly define the short term, medium term and long term goals FSP goals. Giving way to a culture of continuous learning, growth and opportunity to better understand what goals are working and should be built upon and what goals could be shifted or adapted to better suit the need.

When discussing this same topic with UNC Charlotte's CEME and CAL similar themes came up that in order to accurately evaluate collective impact, longitudinal data becomes an important part of the conversation. As is the structure currently the data is evaluated for year to year not long term. They discussed the need for a longitudinal study to begin the

process of collecting data on scholars and families to better understand the long term impact of the summer literacy program.

Another lens collective impact is discussed and viewed through is engaging families in addition to scholars. The interview with Freedom School of Licking County, Ohio is a specific example where this sphere of collective impact is discussed. Organizations aim to engage parents and siblings of scholars by means that are beneficial and accessible via read alouds, fundraising, and other activities. Student leader interns are trained via the Children's Defense Fund and in Licking County specifically, SLIs have other training ranging from medical/behavioral to mandated reporting training to trauma response training. The preparation of student leaders, engagement of parents, and holistic health/education of the scholars come together to form a generalized sphere of collective impact according to organizations in this area. Particularly with students, investing in their education, social/emotional health, community skills, and self-reflection all go back into establishing collective impact.

Idzikowski suggested that the measurements used to measure community level impact are generally the outputs and outcomes from a logic model (see Appendix D for sample logic models). Again she emphasizes the importance of always keeping data in context. Some common themes in reporting collective impact amongst youth aged academic programs are EOG scores, graduation rates, and post secondary enrollment.

The primary buy-in for funders regarding community impact is a well designed, repeatable evaluation plan. Here she also emphasized the value of internal assessment and analysis of data. Keeping data in house allows the agency the opportunity to better align data as well as maintain personally identifying information (PII) in one place. To best maximize reporting of any evaluation plan, she recommends that data need to be clearly defined before collection even begins. Also, it is important to know who will be collecting data and with whom data will be shared.

One opportunity that she can imagine for FSP is to be on the cutting edge of cultural sensitivity evaluation given FSP's curriculum-based emphasis on diversity and representation. She also recommends measuring socio-emotional well being as this has become critically important since the being of the COVID-19 pandemic.

EXTERNAL THREATS

The ongoing global pandemic has threatened the behaviors and operations of countless organizations, including FSP. Before the pandemic, classrooms were full of students completing in-person learning. As a result of COVID, educational programs have largely been transitioned to virtual and socially distanced programs. FSP has adapted the actions and offerings of the organization to support scholars and staff while adhering to COVID guidelines.

As the length of the global pandemic remains unknown, COVID guidelines are constantly changing in educational settings. Students have experienced learning loss due to inconsistency, distance education, and other COVID-related struggles (National Summer Learning Association 2020). Summer programs are a major way to combat learning loss between school years and support the growth and goals of children (National Summer Learning Association 2020). The National Summer Learning Association (2020) published a playbook detailing long-term planning for executing evidence-based practices for high-quality summer programs.

The outbreak of Coronavirus was eye-opening in many ways. A major learning opportunity was the transition of educational institutions to a virtual atmosphere. Organizations were faced with creating and integrating plans of procedures to continue operating during a time of duress. While some organizations had virtual plans to fall back on, they were not necessarily carried out smoothly. As the initial shock of COVID-19 has worn off, organizations have become more aware of the imminent threat of a crisis and the need to be prepared.

Response
Maintaining operations during a global pandemic has changed the dynamic of education. While FSP initially took steps to remain operable during a time of social distance, concrete plans of how to continue their program during crises are recommended.

In-Classroom Adaptations

As an initial response to COVID, FSP sought to create an environment adapted to current

pandemic protocols that would allow scholars and employees to continue program involvement while following community safety guidelines. The FSP 2020 R.E.S.P.O.N.S.E (Reading and Enrichment for Scholars Plus Other Needed Supplies and Essentials) plan provided packets containing books, snacks, and other educational supplies to registered families (Bertrand, 2020). Pick-up locations were established throughout Charlotte to readily supply materials that would continue their mission of preventing summer learning loss. Virtual readings of distributed books were posted on YouTube, featuring local guest readers to promote distance education (Bertrand, 2020). As COVID has endured and protocols lessened, FSP instituted socially distanced Friday fun activities on a bi-weekly basis (Bertrand, 2020). After the initial shock of COVID in 2019, FSP implemented steps to ensure they could still support the education of scholars in a new virtual and socially distanced world. FSP has relaxed on continuing virtual and distance summer learning opportunities as COVID guidelines have decreased. Educational material pickup locations and virtual story time via Youtube could help FSP continuously reach a larger audience. Both are operations they have successfully carried out and can continue without imposing the strain of planning new distance education options.

Emergency Preparedness and Continuity of Operations Plan

Over the past few decades, emergency preparedness has grown increasingly important not only for governments to help mitigate the loss of life and damage to property but also for organizations in the public and private sectors to help mitigate the risk to their organization and personnel. While the ongoing pandemic has increased awareness that more organizations need to develop and implement emergency preparedness plans. Organizations can be faced with many different types of emergencies, including natural disasters, public health emergencies, hazardous materials emergencies, etc. (Ready.gov, 2022). It is important for organizations to not only plan for emergencies that may directly happen within their location but also plan for emergencies that may occur within the community that has the potential to affect their operations as well. There are many important plans that organizations can create to help respond to emergencies, however, the two that best fit FSP would be an emergency response plan and a continuity of operations plan.

An emergency response plan determines what actions should be taken within the first few minutes of an emergency to save lives and stabilize the incident (Ready.gov, 2022). Developing an emergency response plan requires doing a risk assessment to determine what emergencies are most likely to affect the organization and its programs. Understanding the risks to the organization allows for the plan to contain specific resources to be used in the response to an emergency. The ready.gov website, created by the Federal Emergency Management Agency (FEMA), states that at a minimum an

organization should develop the "emergency actions for life safety" portion of the emergency response plan to protect employees, scholars, visitors, and volunteers (Ready.gov, 2022). This portion of the plan details building evacuation, sheltering from severe weather, shelter in place for airborne chemical spills, and lockdowns for acts of violence. Emergency response is an important plan for FSP to develop and implement within their organization to minimize the potential for disaster and protect the personnel within the organization.

A continuity of operations plan (COOP) is used after the initial impact of the emergency to identify resources and coordinate the continuation of critical services and programs within the organization (Ready.gov, 2022). A COOP should be activated when an organization's normal operating procedures will be interrupted for a long period of time. These plans should contain important information such as mission essential functions, the decision-making process for activating the COOP, up to date staff roster, ensuring readiness, personnel accountability, reliable processes for additional resources, and mechanisms for implementing the plan according to the size of the incident (Ready.gov, 2022). COOPs do not need to be extensively long documents. However, they should have all the necessary details for employees or volunteers to take actions that ensure critical functions are operational at least 12 hours after the initial impact of an incident. Attached in Appendix 7 is a COOP template that was developed by the MPA Capstone Class. The COOP is intended to be implemented at a departmental or program level within the organization, however, FSP should review the document and decide the best way to implement this system. All major areas of the COOP template were built specifically for the organization, however, there were areas of the document that were unable to be completed and FSP should look to fill in any missing information that is highlighted within the document.

One of the most important elements to developing and maintaining emergency response plans and continuity of operations plans is training. FSP can develop the most elaborate and detailed plans for the organization, however, if the person who is charged with implementing the procedures described in the plan is not trained correctly, then the plans serve no use for the organization. These plans require quarterly or annual exercises and training to assess the areas that need improvement, train/refresh new volunteers and employees on the operations within the plans and update any critical information that may be needed within the document. These training and exercises should be tracked within the COOP document to ensure that proper maintenance is being completed. Developing and coordinating training exercises can be a difficult and cumbersome task. FEMA has developed training modules that detail how to efficiently and effectively create training programs for organizations. Links to this training course can be found in the emergency management training section of the recommendation for implementing an overall emergency preparedness program.

FUNDING & POLICY OVERVIEW

This section highlights opportunities and threats for FSP specifically in terms of funding and policy. The funding of any charitable organization is vital to its ability to carry out its mission. Policy decisions set by the local, state, and federal governments can create both key opportunities, as well as threats to a charitable organization. Additionally, private companies and foundations provide additional financial support which is detrimental to a charitable organization. The ability to display the effectiveness of the individual summer learning program is important to potential donors, and government bodies to give confidence there will be a return on any investment made into the summer learning program.

Government Funding Trends

Government funding in the form of grants and partnerships provides additional support to an organization's primary fundraising strategy. While government funding is not intended for the primary funding of an organization, it can often be used to offset some of an organization's expenses or allow for the development of new programs and services. However, since 2009, education grant funding from the state and federal governments has been declining, and local governments are struggling to make up for the growing funding gap (Pitcock, 2018). The trends surrounding the growing reliance on local government funding from municipal governments for grants show the importance for charitable organizations to create relationships and partnerships with local government bodies to create dynamic long-term relationships to help serve local communities. Freedom School Partners should have dynamic relationships with these local governments, or school districts.

At the state level most, if not all, educational funding is directed internally to state-funded schools and universities leaving minimal funding for charitable organizations to be allocated through grants, or allocation by a legislature's fiscal budget. The federal government allocates nearly all educational funding to states to be distributed at the state's discretion in the aforementioned process.

At the federal level most available funding surrounds funding for students with

disabilities, ensuring that public and private educational programs can adequately meet the needs of students with disabilities. These grants allow funding for accommodations to be made to ensure disabled students can participate in these educational programs. Freedom School Partners as a result could track the number of disabled students they have in their programs, and apply for the corresponding funding. This is also information Freedom School Partners can report on their community impact, as the inclusion of disabled students is an important metric to many community stakeholders and the federal government.

Since the start of the recent global pandemic, there has been a considerable shift in the funding opportunities for charitable organizations with exponential increases in federal government funding. However, much of the available one-time funding has again been directed to government-run programs.

Corporate and Foundation Funding Trends

Private companies or foundations often publish grants and establish partnerships with charitable organizations which work in their communities. There is a growing trend of publicly traded companies, and private companies wanting to improve their social impact and make a difference in their communities. This trend benefits the charitable organizations involved, as well as the community and these dynamic partnerships can prove very beneficial to everyone involved.

Specifically, in terms of private grants, many companies list these grants online, and in most cases, the qualifications are less restrictive than government grants. An example of this funding includes the Dollar General Literacy Fund which provides grants of up to $4,000 for youth literacy programs every year. In 2021 alone, the Dollar General Literacy Fund provided grants to over 35 organizations in North Carolina and continues to expand year over year. The Dollar General Literacy Fund has various additional grants that Freedom School Partners could also explore. More examples of this funding include the American Library Association which provides grants in the amount of $3,000 for summer literacy programs. As well as various grants sponsored by "Believe in Reading" which is funded by The Steve and Loree Potash Family Foundation. These and other grants are published online and can be reviewed for eligibility on a rolling basis.

Private companies and foundations continue to expand their donations and funding of charitable organizations. It is important for Freedom School Partners to not only monitor these grant opportunities but expand on their existing corporate and foundation relationships.

POLICY OPPORTUNITIES & THREATS

Policy decisions set by the local, state, and federal governments can create both key opportunities, and threats to a charitable organization. As Young (2000) suggests there are several different ways of understanding the relationship between government and private, not-for-profit organizations. In particular, different strands of theory support the alternative views that nonprofits (a) operate independently as supplements to government, (b) work as complements to the government in a partnership relationship, or (c) are engaged in an adversarial relationship of mutual accountability with the government. A historical review of the United States revealed that all three views have validity and that government-nonprofit sector relations must be understood as a multilayered phenomenon.

A review of the history of the United States shows that major changes in the United States often come from nonprofits organizations and a review of those issues indicates that all involved lobbying and advocacy at some point according to Smucker (2005). Smucker expands on his views by explaining that charities played a key role in organizing and conducting the lobbying that led to those reforms. Most nonprofit programs are affected directly or indirectly by elected leaders in Washington, D.C., and in state capitals, city councils, and county governments throughout the nation. Their decisions affect not only public policy that is central to programs carried out by nonprofits but also the funding. It is a little-known fact that while private company donations make up 20% of all charitable income, government-backed funding is the source of 31 percent, according to recent research by the Independent Sector and the Urban Institute (2002).

Freedom School Partners, as a result, may benefit from tracking issues, and funding decisions that have direct, and indirect effects on their programs. Often smaller organizations that have similar interests can work together to collectively lobby for their programs' interest. An example of this for Freedom School Partners would include the National Summer Learning Association's Government Affairs & Policy team which would likely already support the viewpoints of Freedom School Partners at the various levels of government.

As previously mentioned lawmakers make decisions on the policy that can, directly and indirectly, affect an organization. A recent example of a policy threat to Freedom School Partners would include the passage of North Carolina House Bill 82 which in the short term took all available federal funds for summer learning programs and mandated they be used by school systems to create summer learning programs while the funding is available for the next year or so. This action could result in additional summer learning programs in the same area of FSP, resulting in lower program participation in the short term. Additionally, the policy changes make FSP ineligible for large amounts of potential federal funding. An example of a policy opportunity in this same situation would be working with the government at the time to allow organizations to partner with local governments in establishing these short-term summer learning programs.

RECOMMENDATIONS

In the scope of work established early in the process, the MPA Capstone Class established three broad goals in to help formulate an effective report for FSP:

1. Understand best practices for surveying participants, families, alumni, and partners to capture and report community impact,
2. Evaluate current FSP policies and techniques in order to identify areas of opportunity to maximize potential impact, and
3. Gain awareness of relevant externalities at the local, state, and national levels, assess potential impacts to FSP programming, partnerships or funding, and provide recommendations to capture opportunities and mitigate threats.

To fulfill these original objectives, the MPA Capstone Class is offering recommendations under four broad umbrellas: collective impact, investing in evaluation, funding and policy opportunities, and organizational resiliency. Each recommendation in each section is meant to help FSP maximize their potential towards the main "categories" outlined in the scope of work.

Figure 7 | *Recommendation Framework*
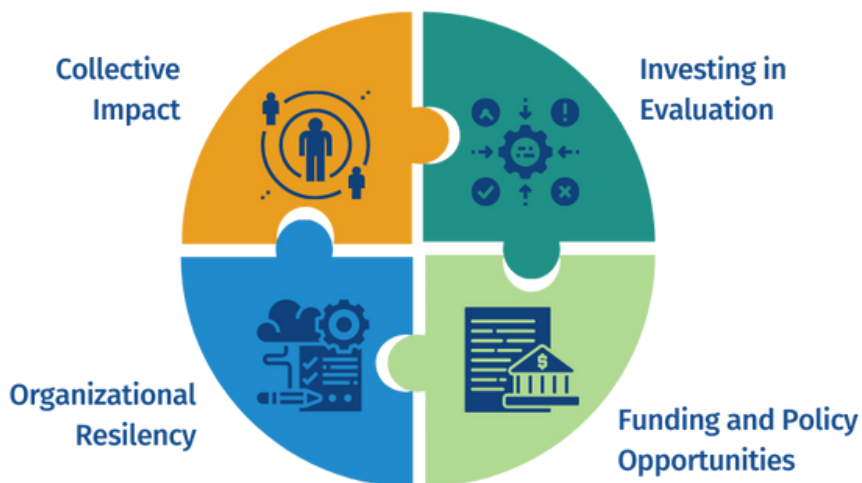
Recommendations: Collective Impact

Recommendation 1: Use Logic Model(s) to Tell the Story of Program Potential and Expected Outcomes

Effective program evaluation is not only collecting and counting data points, but also analyzing and using the information to continually learn about and improve programs, as well as tell the organization's impact story. Two foundational tools that are essential to evaluation are a theory of change and a program logic model.

A theory of change works to identify what program activities are needed to create certain outcomes. A logic model on the other hand works to identify specific data outputs and plausible indicators that will be used to measure the program's effectiveness in effectuating the expected outcomes (Newcomer et al., 2015).

FSP has taken an important step towards telling its impact story by developing a theory of change (Figure 8). Emphasizing the four main focus areas of its summer learning program - literacy, character, relationships, and leadership, FSP's theory of change describes the program activities that will lead to expected short-term and long-term outcomes for FSP scholars and SLIs.

Figure 8 | *FSP Theory of Change*

Appendix B: Freedom School Partners' Theory of Change
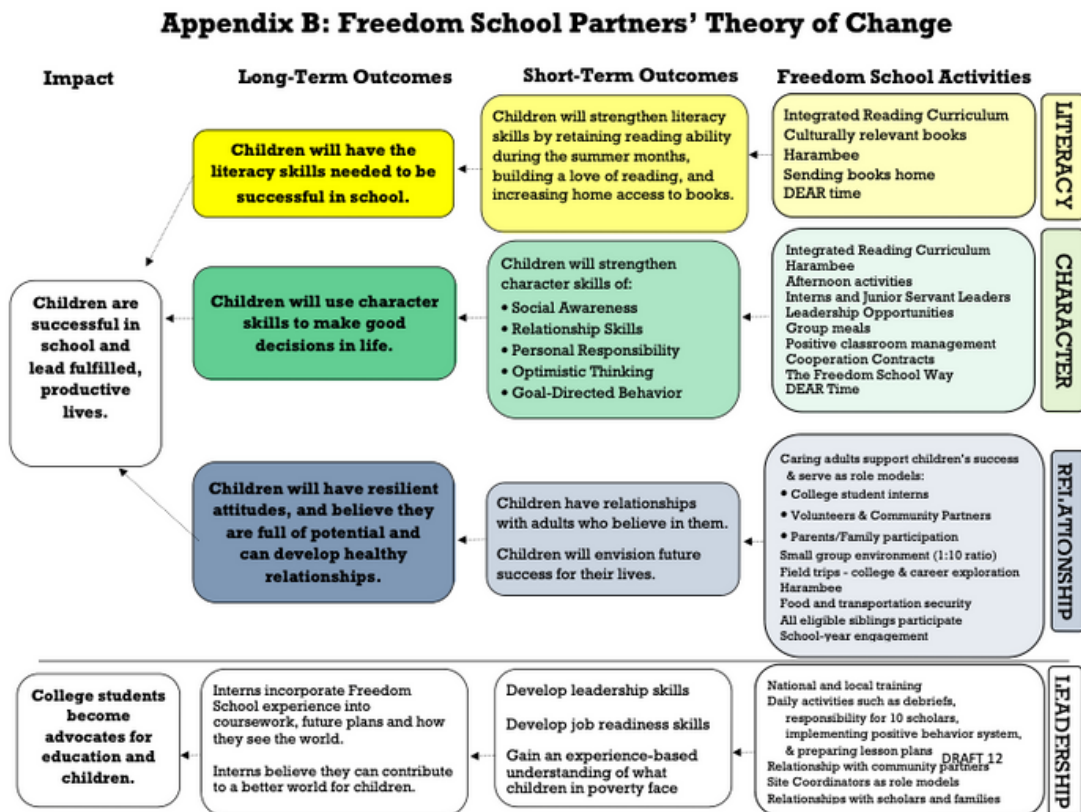
The next step is to develop logic models that will describe the program activities that lead to short-term and long-term outcomes, and identify specific data points and indicators necessary to measure outcome performance as well as collective impact.

A logic model is a systematic and visual way to present and share an understanding of the relationships among the resources needed to operate the program, the activities or services provided, and the anticipated outcomes (Figure 9). Logic models facilitate program planning, implementation, and evaluation, offer improvement opportunities, clarify outcome measurement, and share knowledge about what works and why.

Figure 9 | *Logic Model Framework*
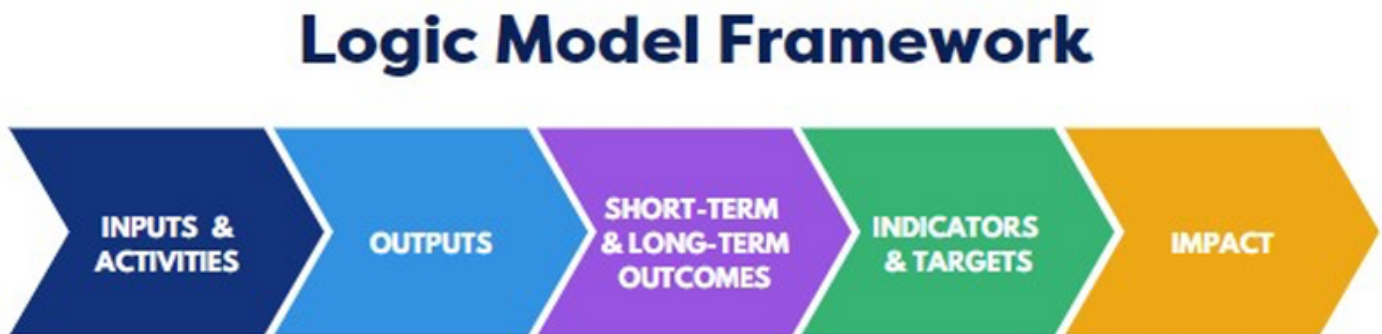
- **Inputs** (also called 'resources') include the human, financial, organizational, and community resources a program requires or already has available to do the work.
- **Program activities** are what the program does with the inputs/resources. Activities are the processes, events, and actions that are an intentional part of the program implementation. The theory of change informs the program's activities.
- **Outputs** are the direct products of program activities and may include types, levels, quantities, time, etc. Outputs are often the things that are 'counted'.
- **Short-term & long-term outcomes** are the specific changes in program participants' behavior, knowledge, skills, status and level of functioning. Short-term outcomes should be attainable within 1-3 years, while longer-term outcomes should be achievable within a 4-6 year timeframe. The logical progression from short-term to long-term outcomes should be reflected in impact occurring within about 7-10 years.
- **Indicators & targets** are especially powerful because they show progress toward outcomes, including those that may be a long time in the making. Short-term indicators should be able to quickly show movement toward short-term goals, whereas long-term indicators may be metrics that take years to come to fruition. Establish appropriate indicators after outcomes are determined; indicator development follows outcome creation to measure a program's progress toward impact.
- **Impact** is the fundamental intended or unintended change occurring in communities or systems as a result of program activities within 7-10 years.

An important point to note is the fact that most nonprofit staff can easily identify inputs, program activities and most outputs. Too often, however, they merely count program outputs and then use them as proof of program effectiveness or impact. This is common among organizations lacking evaluation expertise or dedicated evaluation staff, resulting in much time and effort spent trying to increase the participants served or scale the overall program without really knowing how the program and the organization impacts the participants or the community.

Based on FSP's theory of change, the MPA Capstone Class has developed an example logic model for each of the main focus areas - literacy, character, relationship, and leadership (Appendix D). Two key features to using logic models is that they can be used throughout a program's life, and they can be updated and/or adapted in response to internal or external changes that affect the organization as a whole or the processes by which the program is implemented.

A: Expand the Survey for Parents/Caregivers to Capture Broader Impact

Freedom School Partners already utilizes feedback from parents/caregivers for their program. These surveys assist in gaining feedback about the program itself and any advice on making it better for scholars and the families of scholars. Completed surveys could lead FSP into identifying how former scholars choose to continue their love of reading, whether it be through formal education or career choices. Former scholars possess the capability to become a future employee or FSP's supporters. Those who have completed FSP's summer literacy program understand the importance of FSP and its mission to help children increase their literacy levels. To help move FSP forward, the MPA Capstone Class recommends creating a survey that would address the topic of collective impact that would be important for qualitative data. Gaining knowledge from parent surveys is a great starting point to understand collective impact.

To further discern Freedom School Partners collective impact, the current survey could be edited to include collective impact questions. These questions could include: "Does having a child or children within this program spark conversations about reading activities within the home environment?" and "Has working with FSP improved your motivation to read with your child more?" These questions are a sample for showing the impact depth of how much FSP is affecting families. Parent involvement is a significant predictor of academic success for their children (Ortega & Ramirez, 2002). To help parents become more involved, FSP can ask survey questions that relate to the child and parent participating in reading activities together. FSP can use this information to demonstrate the reach of their program and perhaps

implement at-home activities to increase parent involvement in children's literacy. The potential benefits of involving families together in their literacy journey are numerous and the reach of collective impact could possibly be felt for generations to come.

B: Create Student Leader Intern (SLI) Alumni Survey

The MPA Capstone class recommends that in addition to collecting short-term data regarding SLI experience, FSP should also invest in a long-term data collection strategy for SLI alumni. An SLI alumni survey will reveal the ways in which an intern's experience with FSP influenced their career path. Such information represents another measure for FSP's collective impact.

Insight into FSP's long-term impact on SLIs offers a broader view of the organization's reach. Recent studies have shown that alumni surveys are a cost-effective way to begin an outcome assessment (Fredericks, 2010). Conducting SLI alumni surveys can provide valuable insight into the full extent of collective impact by revealing the distinct ways that FSP prepared interns for their future careers. Long-term data collection through questionnaires should be utilized to track the career paths of interns (City Year, 2020). The alumni survey will speak volumes about the efficacy of the program; additionally, stakeholders, specifically prospective donors, are interested in the impact of the experience on interns in the later stages of their lives (Fredericks, 2010). For example, an SLI alumni survey could gauge the influence of FSP on attitudes toward public service, cultural competency, and volunteer work.

In addition to collecting data regarding SLI alumni career paths, FSP should survey the skills interns gained during their service. Stakeholders are interested in the specific skills gained by interns through the program (Fredericks, 2010). City Year has developed an intern alumni survey that could act as a model for FSP. Within their survey, City Year tailors questions to reveal their program's influence on interns with the following forms of capital (AmeriCorp, 2016):

- Aspirational Capital: the capacity to develop future dreams and career goals.
- Linguistic Capital: the privilege or limitations that language may present.
- Resistance Capital: the ability to succeed in the face of barriers or other resistance.
- Familial Capital: the knowledge gained from working with diverse communities.
- Social Capital: the network developed during the program.
- Navigational Capital: the capacity to navigate social institutions.

In all, an investment in long-term data collection on interns through an SLI alumni survey (see Appendix B) would allow FSP to demonstrate the full extent of their collective impact to stakeholders.

C: Evaluate Social-Emotional Learning (SEL) Internally
Building on FSP's current SEL evaluation outcomes, it is recommended that FSP further these evaluation efforts by conducting a separate SEL assessment internally. Currently, as children are experiencing the COVID-19 pandemic, many may feel an increase in emotional and behavioral challenges. Magnifying the focus on SEL outcomes is one option for FSP to better serve the needs of their scholars while gaining ownership of their data.

A social-emotional learning assessment separate from the UNC Charlotte CEME evaluation that could be conducted by Student Leader Interns or Site Coordinators could allow FSP to evaluate different aspects of their program on scholars' SEL development. The assessment, which consists solely of SEL-related themes and outcomes, can be found in Appendix E, could aid FSP in demonstrating how their program more broadly impacts public safety and education in the community, which is another way to build on collective impact. By illustrating how children's social-emotional skills improve during their time spent with FSP, FSP would be able to track behavioral changes in children. Then, it could use that data alongside previous research in the field to show how children who experience these types of noncognitive interventions are more likely to have positive outcomes in the areas of education, employment, criminal activity, substance use, and mental health.(Jones et al., 2015).

Furthermore, by having the assessment conducted by SLIs, FSP would provide a skill development opportunity for the interns. FSP has noted that one of its goals is to foster career development for its interns- many of whom may be planning on a career in education. Thus, observing the scholars' SEL outcomes and filling out an assessment after their FSP experience provides a chance for the SLIs to gain experience in assessing students, which would likely be a future job component in an educational career.

The MPA Capstone Class has developed an observation tool tailored to FSP's context to be able to better collect SEL data and understand how their program influences SEL outcomes in children (Appendix E). This tool builds on SEL outcomes measured for FSP by UNC Charlotte while including

additional outcomes according to the research found. To use the tool, the scholars are divided by three groups: lower elementary (ages 5-7), upper elementary (ages 8-10), and middle school (ages 11-13). SLIs or Site Coordinators will conduct the assessment during the first week of the program and again during the last week. The data collected can then be compared and analyzed to see any SEL gains, maintains, or losses the scholars may experience over the six weeks.

D: Incorporate Charlotte-Mecklenburg Schools (CMS) Data

Under the current MOU with CMS, FSP has access to robust data about the school performance of their program participants. Access to this data can be beneficial in forwarding other recommendations in the report including evaluation of social-emotional impact, reporting data on students with disabilities, and to measure educational impact beyond literacy scores.

The current MOU allows FSP to collect data from Spring 2022 and Autumn and Spring 2023. Using Spring 2022 data as a baseline, FSP could reasonably measure whether attendance in the Summer literacy program has an impact on limited English proficiency (LEP) status, truancy, suspensions and behavior incidences, course grades, and EOG scores. A further implication of access to this data, is that it can be used to compare FSP Scholars against baseline school and district level data. Using information from the CMS Performance Dashboard as baseline data, FSP can compare the scores of their scholars in various categories against the average results of all students in particular schools or districts.

The MOU with CMS does limit data access to students currently enrolled in FSP's program and who have a parentally signed release of information (ROI), which makes longitudinal reporting more complicated. Here FSP is presented with at least two options for collecting data on alumni of the program: (1) attempt to negotiate future MOUs to allow for data collection from alumni who have a parentally signed ROI or (2) create an alumni program (even if it is mostly ceremonial) to meet the criteria of the MOU. If FSP can gain access to high school data on alumni, and maintain internal data stewardship, then it will not be difficult to create a longitudinal report of outcomes from participation in FSP's Summer literacy program, especially when district and school level data is publicly available.

While the MOU with CMS does explicitly state that FSP cannot make causal claims, it does not forbid descriptive claims. This means that FSP could not report that attendance in the Summer literacy program are more likely to

graduate high school and have higher GPAs. However, if it were reflected in the data, FSP could report that students who maintain a certain attendance percentage and attended multiple summers in the literacy program have an average GPA and attendance rate of X, whereas the baseline data from the CMS Performance Dashboard reports the district average to be only Y.

Based on the literature and external environment scans and compared against the CMS Performance Dashboard here is a list of available data that we believe FSP should be capturing:

For Current Scholars	**For Alumni**
• LEP Status • Excused/Unexcused Absences • Suspensions (in school, out of school, and incident reports) • Retention • Course Grades • Previous Year EOG	• GPA • Credits Attempted/Credits Completed • Graduation Status • Previous Year EOC

Recommendation 2: Collaborate with Other Organizations to Measure the Collective Impact of Summer Learning Programs

The MPA Capstone Class recommends that FSP collaborate with and expand existing partnerships with other organizations in order to measure the collective impact of summer learning programs. The research gathered concerning collective impact makes clear the power of, but also the necessity of, intentional collaborations. To make large-scale change, collaborations are imperative and will enable FSP to continue telling its story.

In terms of data, the collective impact literature notes that having the same consistent measures of impact that are being recorded by all relevant partners to learn, adapt, and improve operations. When partners join together to share data and findings, it draws a much more compelling and insightful picture of the data by being able to identify areas of overlap, or distinct differences. Not only this, but collaborating builds a foundation of trust and mutual respect between organizations.

For FSP, one option is to strengthen partnership with READ Charlotte. This organization acts as a data hub due to its business-to-business status. This partnership would be a step towards aspects of the collective impact pillars. Because of READ's business-to-business status, it is plausible that it could act as a guiding backbone organization to facilitate the collective impact agenda across a large-scale collaborative effort in the community. With all partners sharing their collected summer learning program data with READ Charlotte, the result would be a better understanding of how these programs are impacting the community as a whole.

FSP could also strengthen communication and data sharing with other Freedom Schools under the Children's Defense Fund. Collective impact becomes most attainable when collaborators communicate regularly. The CDF has already established a network of Freedom Schools, and therefore exists common ground. Sharing insights, trends, data, and even tools with other Freedom Schools lays the groundwork to understand how Freedom Schools summer learning programs as a whole are making impact collectively, in what ways, and how. FSP would be able to evaluate the broader impact of its work through strengthening and expanding collaborations.

Recommendations: Investing in Evaluation

By strategically investing in evaluation capacity can shift Freedom School Partners from doing good to creating an impact. Such investments are measured by the return that the investment brings long-term. Freedom School Partners should invest in program evaluation, take stewardship of their data, and build an evaluation culture.

Recommendation 3: Expand Organizational Capacity for Internal Evaluation
The MPA Capstone Class recommends Freedom School Partners expand their organizational capacity for internal evaluation. Internal capacity and expertise for evaluation and data analysis will benefit Freedom School Partners in their ability to evaluate and process data. Freedom School Partners can expand their organizational capacity for internal evaluation by establishing the role of an internal evaluator/data coordinator.

A: Internal Evaluator/Data Coordinator/MPA Fellow
An internal evaluator or data coordinator would be beneficial to pull together the external evaluation reports and internal survey results and incorporate additional evaluation components, such as incorporating CMS data and tracking outcomes in relation to the program's logic models.

Hiring a full-time position employee with innovation and motivation for data systems not only to interpret outcomes but being able to recognize that new systems need to be built and how to properly maintain them would support FSP's effort to measure collective impact and understand better how to continue to build on filling the literacy community need. The data coordinator will be able to tell these two aspects to keep their data fresh and agree with current mission statements and goals.

Another key aspect is communication. An organization must have a data coordinator that is able to interpret the data to everyone while keeping it focused on the organization's main goals; this would be important for reports, presentations, and even stakeholder meetings. The description helps show that a data coordinator is not a stagnant position where someone sits and reads data and gives out reports. It's a position that brings new life within the organization by being able to interpret data to see where the organization is succeeding at their goals and where it is lacking in other aspects.

From interviewing Read Charlotte in regards to their Data Coordinator job, we recommend the position focuses on:

- Being dedicated to assist the FSP members with building and maintaining systems
- Being able to interpret the data to other members of the organization along with stakeholders

At LifeWise StL a fellow Freedom School within the city of Saint Louis Missouri they offer the position known as program evaluator. This position's main takeaways come from the preferred experience. The organization prefers specific master's degrees for the position such as public administration, social work and or related fields. Having these desired educational fields could bring in different points of views on the current data. Another interesting field is proficiency in a second language. If Freedom School wants to have qualitative data through interviewing parents, the interviewer may need to have experience within different languages. This experience can offer up a new realm of data for the Freedom School Partners and should be considered.

- Desired degrees
- Proficiency in second language

This role would be an excellent opportunity to create an MPA fellowship. The program helps government and nonprofit organizations with MPA student interns dedicated to public service. This option can be a better suit for FSP if they feel that a current department head could handle the task of coordinating data and needs quality assistance on the job itself. This option is a cost-effective way of obtaining a qualified employee while giving time to consider developing a data coordinator role for the future. For further information, please contact the MPA director or use the hyperlink below.

MPA Fellowship Opportunity

B: Assume Data Stewardship
For FSP to tell their story and measure impact, the organization should first obtain all of the current data and evaluation components. Many of the recommendations in this report involve some sort of investment in data and evaluation and are all tied to the larger theme of Freedom School Partners being able to maximally report its impact on scholars, families, and communities. Other recommendations involve FSP's ability to partner with other nonprofit literacy and education programs. Data stewardship is not only fiscally responsible, it creates opportunities for better longitudinal reporting, strengthens FSP's value as a partner agency, and reduces opportunities for personally identifiable information (PII) to be mishandled.

Based on feedback from the external environmental scans (see Appendix B) and a review of available literature, Freedom School Partners is several steps ahead of similar agencies in its data collection and reporting methods. However, the UNC Charlotte evaluations could be linked with FSP's own internal reporting, examined over time, and examined for families with multiple children participating in the program. FSP could move beyond paying external evaluators to produce similar reports year after year by taking ownership of their evaluation data and expanding internal capacity to more fully capture the impact of FSP.

By creating and utilizing quality evaluation metrics, Freedom School Partners can build its reputation not only as an exemplary program for learners, but also as a role model for similarly situated learning programs. This will create partnership opportunities to build collective impact, funding opportunities through improved reporting and perhaps revenue from offering evaluation services to smaller grassroots organizations.

Recommendation 4: Expand Organizational Capacity for Alumni Engagement

A: Establish Alumni Coordinator Role

Expanding organizational capacity for Alumni engagement would benefit Freedom School Partners as alumni may provide important feedback, financial support, or volunteer to help Freedom School Partners.

Freedom School Partners can expand organizational capacity for alumni engagement by establishing a primary person to be in charge of alumni engagement. Freedom School Partners could establish an Alumni Coordinator role, or assign similar job duties to a person on their staff currently. This person would also actively work to engage with alumni for future support, such as by returning to the organization later on as interns, and staff for summer programs.

B: Create Alumni Survey

The person assigned to alumni engagement could also develop an alumni survey, to be completed by alumni of the Freedom Schools Partners Programs. Recent studies have shown that having an alumni survey is a cost-effective way to begin an outcome assessment (Fredericks, 2010). The alumni survey may speak volumes about the program and stakeholders who want to see how well the program affects the scholars later in life. This would help FSP begin its journey of alumni scholar observations and better understand how the program affects current and past scholars while offering a different perspective on what the program could be focusing on in the future.

The alumni survey will help lay a foundation for future investments and future generations of scholars. Research on alumni tracking suggests the best course of action when distributing for a better response rate is combining SMS (text message) and Website-based surveys and for the survey to be completed within two weeks (Lau, Eric, Amaya, & LeBaron, 2018). A draft alumni survey may be found inAppendix B to understand better what impact FSP had on the past scholars.

Recommendation 5: Invest In Large Scale Evaluation for a Longitudinal View of the Data

Freedom School Partners could invest in a large-scale evaluation to demonstrate the impact of the program. Two key areas of focus for Freedom School Partners are reporting and finding ways to tell its story better and understand their collective impact in the community. A large-scale evaluation study, such as a randomized field experiment, would provide evidence of program effectiveness to support and potentially expand program operations and funding opportunities. A randomized controlled study or a longitudinal study would be a suggested next step to collecting program impact or long-term data. This could be accomplished either through an internal organization capacity or an external

entity such as through the continued partnership with UNC Charlotte CEME/CAL. The ongoing relationship between Freedom School Partners and UNC Charlotte has led to years of continued successful collaboration with program results that have been consistent that could be built upon.

Recommendations: Funding and Policy Opportunities

This section will highlight recommendations for Freedom School Partners specifically in terms of funding and policy opportunities.

Recommendation 6: Expand Organizational Capacity for Funding and Policy Opportunities

A: Expand Government/Corporate Relations Efforts
Freedom School Partners would benefit from expanding its organizational capacity for funding and policy opportunities. Government funding and policy decisions made at the local, state, and federal levels which affect Freedom School Partners create a revolving need for government advocacy. Freedom School Partners can expand their organizational capacity for funding and policy opportunities by establishing a position or adding to an existing position, various job duties that focus on Government and Corporate Affairs. Freedom School Partners can also work with associations that already represent their similar interests and goals such as the National Summer Learning Association which already has a government advocacy team in place.

B: Expand Government/Private Grant Efforts
Freedom School Partners would benefit as an organization by reviewing, and applying for private and government grants to help their organization. Government grants are published on a revolving basis by government bodies creating a continued need for charitable organizations to review grant postings, and for grant applications to be submitted. Freedom School Partners may also consider creating a part-time intern position for Grant Coordination and Grant Research to be filled by degree-seeking students at a college, or university. UNC Charlotte's Master of Public Administration program has a Grant Writing Course which teaches both grant writing and reporting. As a result, there are a number of qualified degree-seeking students who could potentially fill this position on a recurring basis by contacting the Director of UNC Charlotte's Master of Public Administration Program. Freedom School Partners may also add these job duties to an existing staff member to periodically seek new grant postings. This will allow Freedom School Partners to identify potential grant opportunities on a regular basis. There are various government-backed grants at the local, state, and federal levels that Freedom School Partners may be eligible for that, if received, would help expand the potential impact of the organization in the community. There are also various private grants

awarded by private companies at their discretion which if received would help expand the potential impact of the organization in the community.

Similar to government-backed grants, private companies regularly issue grants to charitable organizations for various reasons including expanding their own community impact, as well as corporate tax deductions. Freedom School Partners would benefit from seeking out and applying for these private grants. Private Companies can donate funds and grants with fewer restrictions than government grants

Having a staff member who focuses on partnerships with private companies would allow Freedom School Partners to further develop potential relationships with private companies to maximize both funding and community impact. A liaison for Freedom School Partners and the Charlotte business community would enable the ability for Freedom School Partners to reach a broader audience of support in the local and state community. While Freedom School Partners currently engages several major stakeholders through its Board of Directors, it should continue to actively seek new partnerships as more companies move to Charlotte, North Carolina.

Recommendation 7: Monitor Data Surrounding Students with Disabilities to Expand Funding Opportunities

Freedom School Partners would benefit from tracking data surrounding students with disabilities in their programs. Freedom School Partners would be able to use such data to become eligible for federal grants established by the U.S. Department of Education for students with disabilities. FSP could then apply for these grants and use the funds to help their organization in helping scholars with disabilities. Freedom School Partners would obtain this information through their data-sharing agreements with Charlotte Mecklenburg Schools, or by working with their scholar's families to keep track of this information. Disabilities is a rather broad term that includes a large range of disorders from ADHD to more severe disorders. Freedom School Partners would also be able to use the same data as a means of measuring their community impact in terms of the number of students assisted with disabilities.

Recommendation 8: Expand into the Greater Charlotte Community

We recommend working with a new local government or county school board to establish a single trial site in one of the counties surrounding Mecklenburg County. Freedom School Partners may receive more government funding and support by working with multiple municipalities. Each local government and school district has a different budget, leadership, and some municipalities may be more willing than others to establish a partnership with Freedom School Partners.

Expanding into the Greater Charlotte Community would allow for the natural growth of Freedom School Partners as an organization. This would allow for the growth of the Freedom School Partners Organization by expanding the number of scholars reached in what is currently an unreached area. There is the possibility of one of the local governments, school districts, or local private companies helping fund or donate a site space for such a trial location as it benefits them.

Recommendations: Organizational Resiliency

The following recommendations were created specifically to increase Freedom School Partners organizational resiliency by developing tools for use when programs and operations are not able to continue normally.

Recommendation 9: Expand Reach via Virtual Learning Options

To reach a larger target audience, FSP could continue to integrate virtual and distance education options into their program offerings. Providing multiple delivery options of educational materials helps students learn in a variety of environments. FSP offered these types of options during peak COVID, but has since stepped away from utilizing virtual education tools.

Summer learning programs have been identified as a bridge between developmental milestones and higher education attainment (Riehl et al., 2019). FSP has played a major role in reducing summer learning loss since its establishment in 1999. However, the unforeseen global pandemic displayed how being out of the classroom can hinder the learning abilities and retention of students. FSP quickly created a virtual learning environment after the initial COVID-19 outbreak. Continuing to provide virtual readings and educational packet pick-ups would allow them to expand their reach and provide learning opportunities outside of the classroom.

Maintaining a virtual classroom is another way FSP can increase its reach. Children would be able to participate in distance education if they were unable to attend in person. The Office of Community Schools in New York created a shared resource guide detailing best practices for educational programs when responding to COVID, that can be used to uphold a virtual learning experience (National Summer Learning Association 2020). Integrating Google classroom is one best practice explained in this resource. Google classroom is a safe and secure way to integrate live virtual learning (National Summer Learning Association 2020).

FSP may also choose to use the Success Mentor Strategies to maximize the effectiveness of virtual learning opportunities; positive communication, wellness check-ins, establishing norms, more learning participation, and attendance meeting participation (National Summer Learning Association 2020). While these steps are used for a student and mentor pairing process, their ideas can be transferred into the learning environment of FSP. Creating an environment that supports various learning styles and most importantly upholds a beneficial learning environment for students will help prevent learning loss.

Additional tools provided by the National Summer Learning Association are available to summer programs. FSP can review the abundance of external resources provided by NSLA and implement what they feel best supports the services they offer.

https://www.summerlearning.org/resources-for-programs-and-families-during-school-closures/

Recommendation 10: Implement Overall Emergency Preparedness Program

As seen with COVID-19, emergencies and disasters can prevent FSP from operating their organization and programs as they normally would. Developing an overall business continuity program for the organization will provide established plans and procedures for continuing operations in the wake of an emergency. CMS does not currently have an emergency preparedness program set up within their school system and since FSP is using CMS school locations to host their programs throughout the summer months it is important that they develop and maintain emergency preparedness tools for use in the case of an emergency. Below is a list of resources that FSP can use to develop and maintain an emergency preparedness and continuity of operations program.

CMS Emergency Contacts

CMS Police Department: (980) 343-6030
Building Services and Maintenance: (980) 343 6040

Continuity of Operations Plan

Nonprofit organizations across the country have developed emergency response plans and continuity of operations plans for their organizations after dealing with the impacts of COVID. FSP would benefit greatly from developing a Continuity of Operations program within their organization. This program would implement a base plan that would provide detail over the overall emergency preparedness responsibilities that FSP have for their employees, volunteers, scholars, and other key stakeholders. Listed below are resources that FSP can utilize to develop and manage their Continuity of Operations program.

Continuity of Operations and Emergency Preparedness Resources
- [Ready.gov Business Continuity Plan](#)
- [City of Charlotte Hazard Mitigation Plan](#)
- [North Carolina Division of Child Development and Early Education](#)
- [North Carolina Department of Information Technology](#)

A COOP template that can serve as a department/program COOP plan has been designed and created specifically for FSP by the MPA Capstone Class. This template can be found in Appendix 7 of this document. This plan should be used to begin the process of developing the Continuity of Operations program for FSP and can be altered and changed to fit specific needs of the program or site that will be using the template.

Emergency Management Training

FEMA has developed the Emergency Management Institute for individuals who have emergency management responsibilities and the general public. These classes are self-paced online modules that provide education and training on many different emergency management topics. These modules can be vital for FSP employees, lead volunteers, and anyone in charge of emergency management within the organization. There is a base list of courses that are important to set the foundation for understanding the entire emergency management process. Below is a list of recommended independent study courses that FSP can utilize to increase their knowledge of emergency management principles and skills to help develop and increase their overall emergency readiness.

FEMA Emergency Management Institute
- IS-230.E Fundamentals of Emergency Management: Click Here
- IS-235.C Emergency Planning: Click Here
- IS-244.b Managing Volunteers: Click Here
- IS-120.c Introduction to Exercises: Click Here
- IS-139.a Exercise and Design Development: Click Here
- IS-271.a Anticipating Hazardous Weather and Community Risk: Click Here
- IS-1300 Introduction to Continuity of Operations: Click Here

CONCLUSION

The MPA Capstone Class has reviewed existing literature, collected information and best practices from similar organizations, and explored ways for Freedom School Partners to grow as an organization. The research allowed the MPA Capstone Class to form recommendations to Freedom School Partners on how they can best capture and report their community impact, identify areas of opportunity for growth within FSP's current practices, and capitalize on external opportunities.

The MPA Capstone Class found through surveys and interviews that Freedom School Partners outperformed many of their peer organizations in terms of their best practices and reporting their impact. Freedom School Partners can now build on their success and incorporate the recommendations established in this report to further grow, and develop their organization.

The recommendations are the foundation for further development and growth as an organization. Freedom School Partners is positioned for long term success and can use these recommendations as a stepping stone to propel them in the future.

ACKNOWLEDGMENTS

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APPENDICES

Appendix A: Scope of Work

**Promoting Resiliency &
Reporting Community Impact
Scope of Work
MPAD 6187 – Spring 2022**

I. Introduction

Freedom School Partners (FSP) is a 501(c)(3) nonprofit that provides summer literacy enrichment for K-8 children in Charlotte, North Carolina. FSP partners with community organizations including Charlotte Mecklenburg Schools (CMS), faith-based organizations, corporations, universities, and neighborhood associations since its startup year in 2009. Their mission is to promote "the long-term success of children by preventing summer learning loss through igniting a passion for reading and inspiring a love of learning." The organization emphasizes believing in the children to encourage children to believe in themselves.

To fulfill its mission, the organization currently offers a six-week summer literacy enrichment program with an evidence-based curriculum that includes culturally affirmative works. The organization also aims to improve the scholars' and their families' overall well-being. Under-resourced students and their families are the primary program participants, as summer learning loss is especially prevalent among underserved communities. FSP also offers enriching internship opportunities for college students, providing professional development experience and the opportunity to serve as a positive role model for program scholars. Throughout their instruction and outreach, FSP places a heavy emphasis on diversity and representation.

Freedom School Partners aims to expand its capacity and strengthen its overall resilience. Improved strategic operations will help FSP to stay focused and allow it to be more efficient in its processes and effective in its mission. To guide the organization over the next three years, a strategic planning effort has recently been started which seeks to develop a new mission statement that aligns with current initiatives and programs:

- Serve more children
- Create programs that inspire children to have a passion for learning
- Respond to new COVID-related impacts
- Summer reading and literacy intervention
- Year-round family support and engagement
- Expanded fundraising and stronger partnership opportunities
- Updating data collection to tell their story better

Freedom School Partners currently evaluates its summer learning program through participant efficacy surveys in partnership with the UNC Charlotte College of Education. FSP has also conducted surveys from parents and other stakeholders in order to capture feedback on programs.

UNC Charlotte Master's in Public Administration (MPA) Task Force in the Spring 2022 capstone class will work with FSP to advance research programs, evaluate data, and propose recommendations to further

demonstrate the impact and expand the reach of the organization. This Scope of Work documents and outlines the UNC Charlotte MPA Task Force tasks and deliverables necessary to achieve these goals.

II. Goals

The UNC Charlotte MPA Task Force will seek to do the following in fulfillment of the partnership with Freedom School Partners:

- **Understand best practices for surveying participants, families, alumni and partners to capture and report individual, organizational, and community impact**
- **Evaluate current FSP policies and practices in order to identify areas of opportunity to maximize potential impact**
- **Gain awareness of relevant externalities at the local, state, and national levels, assess potential impacts to FSP programming, partnerships or funding, and provide recommendations to capture opportunities and mitigate threats**

III. Tasks

The following tasks will be undertaken to meet the goals outlined above.

- **Goal 1 - Measure Impact**
  - Report industry best practices for data collection and analysis to report community impact
  - Make policy and procedure recommendations designed to promote resiliency and growth while effectively reporting community impact
- **Goal 2 - Analyze and Report Practices**
  - Review current FSP data collection practices including intake and survey instruments for scholars and families, and servant leaders
  - Compare existing FSP survey instruments and data collection tools against other analysis and reporting systems and recommend updates based on industry standards
- **Goal 3 - Assess the External Environment**
  - Review existing literature and investigate similar summer learning programs to identify best practices for measuring and reporting community impact
  - Report COVID resiliency/mitigation practices for elementary aged learning programs in underserved communities
  - Create outline/design model for agency Continuity of Operations Plan (COOP)
  - Report local, state and national policy implications that may affect FSP or create funding opportunities

IV. Limitations

The MPA Task Force recognizes that these factors may limit our research, reporting, and presentation:

- This project will be completed in and applicable to the spring of 2022
- FSP simultaneous strategic planning consultation
- Availability of data from FSP collaborators including but not limited to CMS

V. Timeline and Deliverables

Deliverables	Date
Draft Report to Freedom School Partners for Review	April 19, 2022
Final Report to Freedom School Partners	May 3, 2022
Presentation to Stakeholders	May 3, 2022

VI. Data and Information Requested from FSP

- Scholar/Parent survey instruments
- Intake and exit policy and forms
- Summer staff and intern survey instruments
- Partnership network member survey instruments
- Data collected from internal survey responses from scholar, parents, staff and partners
- Data from The UNC Charlotte Center for Adolescent Literacies (CFAL)
- Data from UNC Charlotte's Center for Education Measurement and Evaluation (CEME)

VII. Approval

By signing below, signatories agree that the proposed Scope of Work serves as adequate and appropriate direction for the UNC Charlotte MPA Task Force as commissioned by Freedom School Partners staff.

UNC Charlotte Representative (Joan Llaneza)

_Joan Llaneza_____ Date: _1/28/22_____

Freedom School Partners Representative (George Metz)

_George Metz_____ Date: _1/28/22_____

Appendix B: Alumni Survey Sample

Q1 For the following statements please choose the response closest to your personal experience.

	Strongly Agree	Somewhat agree	Neither agree nor disagree	Somewhat disagree	Strongly disagree
My time in FSP gave me a deeper appreciation for literacy.	O	O	O	O	O
My understanding of cultural diversity was increased thanks to the FSP program	O	O	O	O	O
I developed skills at FSP that helped me in my academics after leaving the program	O	O	O	O	O
My critical thinking skills were improved thanks to FSP	O	O	O	O	O
FSP helped me develop skills that have been helpful outside of academics	O	O	O	O	O
FSP helped me to become a more confident student	O	O	O	O	O
FSP helped me to improve my communication skills	O	O	O	O	O

Q2 My GPA at graduation will be...

O 3.5 - 4

O 3 - 3.49

O 2.5 - 2.99

O Below 2.49

Q3 My plans after graduation are...

O Four Year College or University

O Trade School or Technical College

O Entering the workforce

O Other _____

Q4 My strongest areas of academics are....

☐ English Language Arts

☐ Mathematics

☐ Natural Sciences

☐ Social Sciences

☐ Non-English Languages

☐ Arts

☐ Athletics

Q5 For the following statements please choose the response closest to your personal experience.

	Strongly Agree	Somewhat agree	Neither agree nor disagree	Somewhat disagree	Strongly disagree
I would recommend FSP to friends and family members	O	O	O	O	O
I was satisfied with my experience at FSP	O	O	O	O	O
I would consider coming back to be a servant leader at FSP	O	O	O	O	O

Q6 What was your most memorable experience from FSP?

_____

Q7 How would you recommend improving the program at FSP?

_____

Appendix C: Survey Questionnaire with Results

External Environmental Scan Survey

The following survey was sent to organizations similar to FSP between February 14th and February 25th 2022. Below is the collected data from the survey.

Q1 - Which of the following quantitative data is your organization currently collecting regarding participant outcomes?

#	Answer	%	Count
1	Program Pre-Test Scores (Entrance Evaluations)	38.46%	10
2	Program Exit Test Scores (Exit Evaluations)	42.31%	11
3	School data: (please describe)	15.38%	4
6	Other: (please describe)	3.85%	1
	Total	100%	26

Other: report cards, grades, test scores, attendance, pass/fail ratios, computerized diagnostics

Q2 - From which of the following sources does your organization gather qualitative data (stories, comments, etc.) regarding participant outcomes?

#	Answer	%	Count
1	Participants	29.41%	10
2	Parents	26.47%	9
3	Program Staff	35.29%	12
4	School Staff	8.82%	3
5	N/A	0.00%	0
6	Other: (please describe)	0.00%	0
	Total	100%	34

Q3 - For how long does your program maintain collected data?

#	Answer	%	Count
1	1 year	16.67%	2
2	2 years	0.00%	0
3	3 years	25.00%	3
4	4 years	0.00%	0
5	5+ years	58.33%	7
	Total	100%	12

Q4 - Does your organization continue to collect participant data after program completion?

#	Answer	%	Count
1	Yes	16.67%	2
2	No	75.00%	9
3	N/A	8.33%	1
	Total	100%	12

Q5 - Does your organization collect data regarding volunteers/interns?

#	Answer	%	Count
1	Yes	76.92%	10
2	No	23.08%	3
3	N/A	0.00%	0
	Total	100%	13

Q6 - What data does your organization gather regarding volunteers/interns?

#	Answer	%	Count
1	Demographics	37.50%	6
2	Duration of partnership	31.25%	5
3	Entrance surveys	6.25%	1
4	Exit surveys	18.75%	3
5	Other: (please describe)	6.25%	1
	Total	100%	16

Other: skills, languages spoken, areas of expertise

Q7 - Is there any data that your organization would like to be capturing but currently is not?

#	Answer	%	Count
1	Yes (Please Describe)	33.33%	4
2	No	66.67%	8
	Total	100%	12

Please Describe: school data from participants, intern follow-up surveys, baseline school data, parent engagement surveys, outcomes for program graduates

Q8 - What do you see as your organization's barrier to collecting the data described in the previous question?

"Evaluation methods, additional staff to complete evaluations"

"Not sure...we just have never decided to collect, but now with the COVID Learning Loss on top of traditional summer learning loss, it may be worth it."

"need to coordinate with the school districts"

"Lack of staff capacity to engage with populations who we don't see on a regular basis, difficulty in tracking folks down (young adults often change numbers, making it hard to reach them even several months after they've gone through our programs)"

Q9 - From which of the following sources does your organization collect data?

#	Answer	%	Count
1	Directly from the participants (tests/evaluations)	40.74%	11
2	Parents	25.93%	7
3	Schools	18.52%	5
4	Program administrators working with participants	11.11%	3
5	Other (please describe)	3.70%	1
	Total	100%	27

Other (please describe): Independent test administrator

Q10 - Please describe the relationship that your organization has with its local school, school district, or school system?

"It has been a well constructed relationship, we work hard to keep clarity regarding our goals for the students"

"The organization has a liaison with each school to assist with our program."

"We have MOUs with all of the schools we serve."

"We partner with 4 local school districts, and private and charter schools. LifeWise Teen Advisors work with school counselors to help ensure scholars receive the support they need to be successful in schools. We host events at all partner schools to recruit new scholars for our programs. Our volunteer departments work with the schools to recruit mentors for scholars."

"Our adolescent program staff have specific staff (mostly guidance counselors) that they maintain regular contact with at schools from which our participants come from"

Q11 - What modes of communication does your organization use for collecting information regarding participants?

#	Answer	%	Count
1	Interviews (In person or virtual)	50.00%	6
2	Phone calls	8.33%	1
3	Emails/online reporting forms	16.67%	4
4	Mail	0.00%	0
5	Database or other data reporting software	16.67%	2
6	Other: (please describe)	8.33%	1
	Total	100%	12

Other: interviews and online reporting forms

Q12 - Does your organization maintain contact with program alumni?

#	Answer	%	Count
1	Yes (Please describe that process)	66.67%	8
2	No	33.33%	4
	Total	100%	12

Q 12.5 (Please describe that process)

"email, social media interactions, updates from parents"

"Our site coordinator works for the school system so she have the chance to keep in contact with alumni or their parents"

"Some come back to work for us or send their own children through the program."

"We have a full time Alumni Advisor (may need to be careful here as I am also struggling tWe have a full time Alumni Advisor who maintains contact with alumni through phone calls, text messages and email. Frequency of contact varies depending on the alumni's goals and need for support. We also have a series titled Adulting 101 to continue offering life skills to scholars as they transition to adulthood."

"via additional School year program opportunities, ongoing support to scholars and or families"

"We try to do this but it is very difficult. Often we manage to maintain contact only with the most engaged of former participants. We've had several alumni even come work at the org."

Q13 - How involved is your organization with its surrounding community?

#	Answer	%	Count
1	Not at all	0.00%	0
2	Slightly	0.00%	0
3	Moderately	45.45%	5
4	Very	36.36%	4
5	Extremely	18.18%	2
	Total	100%	11

Q14 - How important is reporting collective impact to your organization?

#	Answer	%	Count
1	Not at all important	0.00%	0
2	Slightly important	0.00%	0
3	Moderately important	0.00%	0
4	Very important	60.00%	6
5	Extremely important	40.00%	4
	Total	100%	10

Q15 - How important is reporting collective impact to your funders?

#	Answer	%	Count
1	Not at all important	0.00%	0
2	Slightly important	0.00%	0
3	Moderately important	0.00%	0
4	Very important	45.45%	5
5	Extremely important	54.55%	6
	Total	100%	11

Q16 - How does your organization measure collective impact, if at all?

N/A

"Test scores, parent's and Scholars feedback, school staff testimonials, etc"

"By change in student performance"

"Shared community referral database - www.uniteus.com (status of referrals made by us); survey indirect participants (parents/caregivers of youth; caregivers of senior or disabled participants); conduct community focus groups"

"we do not measure outside of the pre-/post-testing and end-of-program surveys"

"growth in reading levels; via qualitative Stories of impact from participants, through policy and system changes that we advocate for"

"We're still trying to figure this one out. We do community organizing work so keeping an eye on how policy is impacted is one way we do this. More indirectly, we look at Census data to make sure we're aware of some of the greatest needs in our community"

Q17 - What do you view as barriers to achieving greater collective impact in your community?

"Expanding the program to more locations in the community."

"Appropriate partnerships, funding."

"Funding and capacity"

"Miscommunication and sometimes lack of interest from some part of the school system. Still we Always work hard to continue our support to the families we work for."

"Time and establishing a plan"

"logistics of measurement, difficulty with differentiating causation vs. correlation, lack of resources and expertise in this specific evaluation area- training/resources would be welcome!"

"need a year-round wrap-around program"

"staff capacity, alignment with other institutions, funding capacity"

"It's difficult to measure and attribute causality so it's hard to say. The greatest barriers are the challenges that folks in our community face; poverty, poor housing conditions, underemployment (especially for young people), lack of investment (we work with residents in public housing), etc. These are big barriers so it's difficult to achieve collective impact without investment and support from bigger actors (e.g. government)."

Q18 - How is data processed by your organization?

#	Answer	%	Count
1	Internally	18.18%	2
2	Externally	27.27%	3
3	Some Combination of Internal and External	54.55%	6
4	Other: (please describe)	0.00%	0
	Total	100%	11

Q19 - How are data reports/impact reports shared externally?

#	Answer	%	Count
1	Website	28.00%	7
2	Emails	28.00%	7
3	Mail	20.00%	5
4	Local media or press	0.00%	0
5	Stakeholder Meetings	16.00%	4
6	Other: (please describe)	8.00%	2
	Total	100%	25

Other: grant applications

Q21 - Of those initial changes, how many are still in practice today?

"We hold meetings virtually still. We plan to have in-person in 2022."

"We still offer some virtual programming but our summer offering will be in person in Summer 2022."

"Few; virtual events still take place as local COVID rates indicate"

"We are still offering family engagement meetings virtually and have also maintained our field placement programming virtually"

"Currently our sites are reopened but in smaller pods"

"COVID masking/cleaning/communication protocols, provide tech devices to scholars as needed. Ended virtual learning programming for youth based on data that showed in-person learning was significantly more beneficial for youth."

"Masks"

"60% of staff working remotely, one program still virtual"

"We still have some programming that is a mix of virtual and in person. Addressing learning loss is still something we will focus on for summer programming."

Q22 - As it relates to learning outcomes, how have your participants been affected by COVID-19 and the pandemic?

"One thing we noticed is that participants seemed less motivated."

"We are still determining how our participants have been affected. We do know the area of the city we serve had the lowest login numbers during online learning."

"Increase in behavioral and social challenges"

"Although we have tested any of our scholars, parents have reported seeing a decline in their academics"

"yes. our participants were already grade levels behind, remote and out of school days do not help. Adding a rise in trauma for families during this period is also affecting outcomes."

"Participation numbers overall have decreased. We suspect that teens who are no longer participating have decreased learning outcomes (most are working instead of participating in after school programming) although have been unable to measure/confirm. Of participants who have maintained participation, reading level outcomes remain very similar to pre-pandemic levels, based on Freedom School summer reading assessments. We have been having more challenges with getting grade reports from scholars and partnering schools so it is difficult to say for sure whether grade outcomes have changed."

"socialization skills are much poorer, especially at younger ages"

"Anecdotally, we know they have been. We haven't had the capacity to compare past school data to more recent school data to see what that looks like as grades, classes passed, etc."

Appendix D: Logic Models

FSP Logic Model - Literacy

Freedom School Partners

Literacy Needs: Studies of summer achievement find that under-resourced children and youth are at increased risk for learning setbacks over the summer relative to peers with adequate resources. (Downey, Von Hippel, and Broh, 2004; McCoach et al., 2006; Benson and Borman, 2010; Von Hippel, Hamrock, and Kumar, 2016) and the effect is cumulative (McCombs et al., 2011).

Literacy Intervention: Implement a summer learning program utilizing an integrated reading curriculum which is culturally relevant, intentionally curated, fosters a love of reading, promotes regular attendance, and provides books for the home.

INPUTS	ACTIVITIES	OUTPUTS	SHORT-TERM OUTCOMES	LONG-TERM OUTCOMES	INDICATORS
• FSP Program Staff • Site Coordinators • Servant Leader Interns (SLI) • Parents • Integrated reading curriculum (IRC) • FSP training curriculum	• Morning IRC • DEAR time (Drop Everything And Read for 15 minutes) • Sending books home • Parent / caregiver engagement • Parent/scholar survey	• # days scholar attended FSP • # of books sent home • # of hours spent reading at FSP • # of books read alone / aloud • Parent/scholar survey responses	• Scholars will strengthen literacy skills by **retaining reading ability** during the summer months, building a **love for reading**, and increasing **home access to books.**	• Scholars will have the literacy skills needed to be successful in school. • Scholar will continue to enjoy reading.	• Scholar average weekly attendance • % of scholars report 'like' or 'love' DEAR time and can name at least 1 book they are currently reading **at home.** • % of parents or caregivers who report dedicating time to read aloud with their child 4+ days per week

Other Indicators:
- FSP program data (# of scholars, # of program sites, etc.)
- % scholars with sibling enrollment
- Scholar demographics (CMS)
- Alumni survey responses (SLI and parent)

Collective Impact Indicators:
- % of scholars who retain reading proficiency from spring to spring
- % of scholars with 80% or greater average weekly attendance during the school year (CMS Data)
- % of scholars with 2+ years of FSP program enrollment

FSP Logic Model - Character

Character Assumptions: When children and youth possess a full array of positive character skills, they collaborate better with peers and engage in helping behaviors (Durlak et al., 2011), demonstrate self-regulation (Dusenbury & Weissberg, 2017), report increased optimism and confidence (Schonert-Erichl & Lawlor, 2010), and are better equipped to prosper in the classroom (Taylor et al, 2010).

Character Intervention: Integrate positive social, emotional, and cognitive skill development into summer learning program.

INPUTS	ACTIVITIES	OUTPUTS	SHORT-TERM OUTCOMES	LONG-TERM OUTCOMES	INDICATORS
• FSP Program Staff • CMS • Site Coordinators • Servant Leader Interns (SLI) • Parents • The Freedom School Way (SEL) • FSP training curriculum	• Harambee • Afternoon activities • Group meals • Cooperation contracts • DEAR time • Pre-post SEL observations • Parent/scholar survey	• # days scholar attended FSP • # books and activities centered in character skills • SEL observations pre-post • Parent/scholar survey responses	Scholars will strengthen characters skills: • **Social awareness** • **Relationship skills** • **Personal responsibility** • **Optimistic thinking** • **Goal-directed behavior**	• Scholars will use character skills to make good decisions in life.	• average weekly program attendance • SLIs will report scholars' improvement and/or consistency in demonstrating character skills • Parents will report scholars' demonstrating character skills

Other Indicators:

- FSP program data (# of scholars, # of program sites, etc.)
- Scholar demographics (CMS)
- % scholars with sibling enrollment
- Alumni survey responses (SLI and parent)

Collective Impact Indicators:

- % of scholars with 80% or greater average weekly attendance during the school year
- % of scholars with # or fewer classroom discipline reports from spring to spring
- % of scholars with 2+ years of FSP program enrollment
- % previous scholars graduating HS

FSP Logic Model - Relationship

Freedom School Partners

Relationship Assumptions: Students who report feeling supported by and connected to their peers and teachers are more engaged in learning and perform better academically (Cohen & Garcia, 2008; Durlak et al., 2011; Durlak & Pachan, 2010). Quality relationships with students, mentors, co-workers, and parents positively influences teacher motivation and engagement (Brown et al., 2010).

Relationship Intervention: Foster the development of positive quality relationships between scholars, SLIs and scholars, SLIs/site coordinators, and parents, SLIs and site coordinators, FSP staff and site coordinators, and FSP staff and CMS

INPUTS	ACTIVITIES	OUTPUTS	SHORT-TERM OUTCOMES	LONG-TERM OUTCOMES	INDICATORS
• FSP Program Staff • CMS • Site Coordinators • Servant Leader Interns (SLI) • Parents • FSP training curriculum	• Harambee • Group meals • Parent / caregiver engagement • Parent communication • Parent/scholar survey • SLI program survey	• Scholar/parent survey responses • SLI program survey responses • # of SLIs who return after year one • # of parents attending engagement activities • # of parents volunteering at FSP	• Scholars will have **positive relationships with adults and peers who believe in and support them**. • SLIs will serve multiple **years in program** • Parents / caregiver will be **engaged in child's literacy**.	• Scholars will have resilient attitudes and can develop healthy relationships. • SLIs will have skills to build positive relationships with students, mentors, co-workers and parents. • Parents and SLIs will positively impact their communities	• % of SLIs serving 2+ years • % of parents who attend engagement activities • % of parents or caregivers who report dedicating time to read aloud with their child 4+ days per week • % of parents volunteering at FSP

Other Indicators:
- FSP program data (# of scholars, # of program sites, etc.)
- Scholar demographics (CMS)
- % scholars with sibling enrollment
- Alumni survey responses (SLI and parent)

Collective Impact Indicators
- % of scholars with siblings enrolled
- % of scholars with multi-year enrollment
- % parents volunteering at CMS school
- % previous scholars graduating **HS**

FSP Logic Model - Leadership

Leadership Need: Pre-service educators report being more unprepared for classroom management (Collie et al., 2012) and do not receive adequate exposure to culturally responsive curriculum prior to being in the classroom (Chuang et al., 2020).

Leadership Intervention: Provide paid teaching internships to college students that includes training and mentorship.

INPUTS	ACTIVITIES	OUTPUTS	SHORT-TERM OUTCOMES	LONG-TERM OUTCOMES	INDICATORS
• FSP Program Staff • Site Coordinators (SC) • Servant Leader Interns (SLI) • Culturally responsive curriculum • FSP training curriculum	• National and local SLI training • SC training • Preparing lesson plans • Daily debriefing and mentorship • SLI end of program survey • SC end of program survey	• SLI program survey responses • # of SLIs who return after year one • SC survey responses • # of FSP sites • FSP program data (# of scholars, etc.)	• SLIs will serve multiple **years in program** • SLIs will be better **prepared for classroom management** • SC will work collaboratively with FSP staff to improve/scale Freedom Schools	• SLIs and SCs will incorporate FSP experience into career and how they see the world • SLIs will become educators or work in public / community service • SCs will serve as community leaders	• % of SLIs who report intending to work in education or public service • % of SLIs and SCs serving 2+ years • % growth of FSP sites and scholars 3, 5, & 10 years

Other Indicators:

- Scholar demographics (CMS)
- % scholars with sibling enrollment
- Alumni survey responses (SLI and parent)
- Summer learning program benchmarking data

Collective Impact Indicators

- % of SLI alumni who become classroom teachers
- % of SLI alumni who work in education, local government, and/or nonprofits
- % growth of FSP sites and scholars 3, 5, & 10 years
- % previous scholars graduating **HS**
- % previous scholars graduating college

Appendix E: SEL Observation Tool

SEL Observation Tool

Instructions: To track and report scholar social and emotional learning, use appropriate observation tool for lower elementary (ages 5-7), upper elementary (ages 8-10), and middle school (ages 11-13).

Conduct a pre-assessment during the first week of camp and a post-assessment the last few days of camp.

Scoring Rubric: 1 = Below expectations; 2 = Meets expectations; 3=Exceeds expectations

Lower Elementary (5-7 yrs) 1 = Below expectations; 2 = Meets expectations; 3 = Exceeds expectations		SELF-AWARENESS & SELF-MANAGEMENT		SOCIAL AWARENESS & RELATIONSHIP SKILLS				RESPONSIBLE DECISION MAKING	
		Skill 1: Emotional Awareness	Skill 2: Emotional Regulation and Focus	Skill 3: Perspective of Others	Skill 4: Cooperative Relationships	Skill 5: Interpersonal Conflict Resolution	Skill 6: Independent Decision-making	Skill 7: Problems Solving
Scholar	Age	Can recognize and accurately label basic emotions, including happy, sad, angry, anxious, afraid, etc.	Can recover from upsetting emotions quickly with support; can delay gratification when prompted; can follow through on one or two specific responsibilities without prompting	Can usually recognize when others are sad, mad, or happy; responds with appropriate reactions to others when they are hurt	Works well in groups most of the time; has at least two friends they interact with regularly; is sometimes willing to include others in group activities without prompting	Usually does not resort to physical or impulsive reactions when in a conflict with others; sometimes can stay or become calm and talk through conflicts with adult assistance	Knows when consequences of actions are hurtful to others; usually tries to avoid being hurtful; sometimes apologizes without being prompted	Usually offers suggestions for how to solve problems when prompted; usually responds appropriately to others' perspectives and ideas when asked

Upper Elementary (8-10 yrs)		SELF-AWARENESS & SELF-MANAGEMENT		SOCIAL AWARENESS & RELATIONSHIP SKILLS			RESPONSIBLE DECISION MAKING	
1 = Below expectations; 2 = Meets expectations; 3 = Exceeds expectations		Skill 1: Emotional Awareness	Skill 2: Emotional Regulation and Focus	Skill 3: Perspective of Others	Skill 4: Cooperative Relationships	Skill 5: Interpersonal Conflict Resolution	Skill 6: Independent Decision-making	Skill 7: Problems Solving
Scholar	Age	Can recognize and accurately label a range of emotions (pride, surprise, frustration, lonely, honesty, fairness); can connect feelings to situations in which they occur with prompting	Can use self-talk strategy to calm down when upset; can set and work toward goals in at least one area; can follow through on multiple responsibilities with prompting	Accurately recognizes feelings of others; provides appropriate support to peers in need of help without prompting; acts respectfully to peers and adults most of the time without prompting	Can work well with others in groups, and usually responds well with minimal prompting; works through conflict and stays on-task in group settings; interacts well with others	Does not use aggression when in a conflict with others; sometimes is able to talk through situations verbally without blaming; sometimes seeks appropriate help from adults when in difficulty	Knows when consequences of actions are hurtful to others; usually apologizes for hurtful action; can articulate strategy for solving problems involving others	Suggests alternative solutions to problems or adds to other's ideas without prompting; responds appropriately to others' perspectives and ideas without prompting

Middle School (11-13 yrs)		SELF-AWARENESS & SELF-MANAGEMENT		SOCIAL AWARENESS & RELATIONSHIP SKILLS			RESPONSIBLE DECISION MAKING	
1 = Below expectations; 2 = Meets expectations; 3 = Exceeds expectations		Skill 1: Emotional Awareness	Skill 2: Emotional Regulation and Focus	Skill 3: Perspective of Others	Skill 4: Cooperative Relationships	Skill 5: Interpersonal Conflict Resolution	Skill 6: Independent Decision-making	Skill 7: Problems Solving
Scholar	Age	Can recognize and accurately label a range of emotions in oneself ; does not participate in active support of bullying, intimidation, or "bystanding"; understands "risky" situations and can identify associated feelings when asked	Can state feelings and perspectives using "I"messages; can follow through on multiple responsibilities; focuses on goal-attainment	Shows appropriate concern for feelings of others; sometimes provides support to peers without prompting; responds with respect to diverse others (gender, ethnicity, disability, etc.)	Has at least one stable, positive relationship in the class; has an appropriate, non-negative relationship with at least one adult in the classroom; in group settings, occasionally participates actively and listens to opinions	Uses non-aggressive strategies to resolve conflicts; show appropriate assertiveness when confronted by others	Looks at consequences taking into account both self and others; apologizes when actions harm others; engages in continued constructive problem solving when obstacles are encountered	Offers suggestions in response to others' ideas; shows concern about and is helpful in meeting group goals

Appendix F: Children's Defense Fund Organization Interview Guide

Children's Defense Fund Organization Interview Guide

Freedom School Organizations Interviewed:

LifeWise StL
Scott E. Walker- President/CEO
swalker@lifewisestl.org
St. Louis, Missouri
- Our mission is to help individuals and families achieve economic well-being by providing high-impact, relationship-based programming and by addressing systemic barriers to their success.

CDF Freedom Schools of Licking County
Eva Marie Wolfe- Executive Director
pastorem.wolfe@gmail.com
Licking County, Ohio
- The Johnstown-Northridge Freedom School was started in 2013 with the partnership of Johnstown, Alexandria and Croton United Methodist churches in response to the lack of local summer tutoring and literacy activities as part of a national network of Children's Defense Fund Freedom School programs. This is the first local program is the first rural Freedom School in Ohio.

The Peter Spencer Family Life Foundation
Fran Livingston
fran.livingston57@gmail.com
Wilmington, Delaware
- The Peter Spencer Family Life Foundation (PSFLF) is a community development project of the Mother African Union Church. It is a 501(c)3 non-profit organization, incorporated in 1999. The purpose of the organization is to develop and implement specific programs that address the need to build a positive self-concept in the African American Community, particularly in the lives of children and youth. PSFLF is a resource to the community that offers innovative programs that revolve around themes of building pride, self-concept, and self-esteem both individually and as a collective community. It also develops and implements programs to enhance the quality of life.

<div align="center">

Purpose of the Interviews:

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Each of these organizations intentionally answered our survey regarding best practices and resilience as a Freedom School. They specifically answered two open ended questions regarding how their organization measures collective impact and what did the organization view as barriers to achieving greater collective impact. During these interviews, our goal is to dive deeper into these organization's perspectives on collective impact.

<div align="center">

Interview Questions:

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Tell me about your history with the Children's Defense Fund and Freedom Schools.
- How long have you been involved in evaluation of FS?
- How is communications and data sharing within your organization?
- How about with external partners?
- Are you using the information to plan not just for the next year but for growth or expansion
- Describe your relationship with your school district?

Can you tell me about your evaluation process?
- What led to this model? What was the focus of the evaluation?
- Has that process or focus changed over the years?
- Have you noticed any trends?
- Do you have the raw data you could share so we can do some of our own analysis?
- Is there any data your organization would like to be capturing but is not, and are there any barriers to collecting that data?
- Have you seen anything different during COVID in evaluation?

How would you define impact goals through different lenses? Parent engagement, funding and partnerships, volunteers & interns?
- What data collection protocol/process do your site coordinators use to collect data? (ie attendance, data collection, parent engagement)
- What more would you like to gain from your participants?
- Do you have SLIs return after the first year? If so, how many would you estimate return?
- What information would you like to know about your SLIs after leaving FSP?
- How do you currently measure parental engagement?
- How do you define success when speaking of parental involvement?
- What plan(s) do you have that will increase parental engagement?
- How are SLI and site coordinators trained? Through an in person training through the CDF (except for during covid it was virtual) and then they also do training at FSP. So in total they receive about 3 and a half weeks of training.

What were the major shifts/challenges that have stood out while operating under COVID protocol?
- What programs were implemented or adapted during COVID? Does FSP want to continue and/or expand them?
- Trends in employee and scholar retention and satisfaction pre-pandemic and currently
- Reflecting on COVID, how are you positioned as an organization to respond to future emergency disruptions?
- What is your interest in increasing the organization's capacity to respond to emergency disruptions? How much time/resources would you like to dedicate to this program? (Trained personnel, budget, maintenance etc.)

Tell me about your funding opportunities?
- For grants that you do receive, what are funders asking you to measure and report?
- What government funding/assistance does FSP receive currently?
- What opportunities would you like to pursue?
- How do you evaluate your community events?
- Are there any challenges or reoccurring issues for FSP in qualifying for government grants?

Can you define collective impact from within your organization?
- Is there any significant difference between community and collective impact?

How do you measure collective impact within your organization?
- How long does it take to measure collective impact?
- What are funders looking for regarding collective impact?

Any other information you'd like to share, or you think might be helpful for our group to look into to help your organization?

Appendix G: Continuity of Operations Department/Program Template

Continuity of Operations Plan

<mark>Insert Department Name</mark>

Last Revised – <mark>XX/XX/XXXX</mark>

Introduction

Business continuity is the process of ensuring that departments can endure after a disruption in services. This is done by planning and establishing mitigation steps that protect employees, data, equipment, records, and critical supplies potentially impacted by a disruption.

This continuity planning is conducted at the department level and is intended to guide the development of more encompassing plans at the organizational level. Given the unique nature of each department, only the department essential personnel can document the strategies to be taken to preserve the departmental mission. The Continuity of Operations Plan (COOP) is intended to guide the department through improving practices and procedures to preserve or quickly recover when a crisis affects the individual department or organization.

The format of this document guides users through the process of identifying the priority of restoration of services and identifies essential personnel, equipment, and applications. In some instances, technology or engineering solutions may be necessary. To complete this form:

- Fill in all fillable fields to the best of your ability.
- Identify vulnerabilities, and consider and implement ways to increase resiliency and redundancy.
- Maintain a copy of the completed COOP template in a location that can be retrieved if the workspace is no longer able to be occupied or the organization's information technology network is no longer accessible.
- Share a digital copy with all important stakeholders within the organization or have a central location that is accessible.
- Update the COOP template yearly or as critical information changes.

Table of Contents

Overview

Insert Departmental Description

Contact Information

Provide names and contact information for two people responsible for completing and maintaining this plan.

Primary Lead Contact Name	Email	Office Phone	Cell Phone
		Department / Unit Name	
Secondary Lead Contact Name	Email	Office Phone	Cell Phone
		Department / Unit Name	

Program Name

Provide a name for each service provided by your department and put them in priority order.

Program Name	Brief Description

Key Personnel and Lines of Succession

Key personnel include all necessary staff to maintain essential functions. This section should list the contact information for all key personnel, including their name, department, primary and alternate phone numbers and email addresses.

Departments may also find it useful to also have the personnel ID numbers recorded. This is essential when seeking access to restricted areas within the organization.

Key Personnel Contact					
Name	Role	Phone No.	Secondary Phone No.	Email	Employee ID

A leadership successor is a person who would be an appropriate substitute if the Departmental leadership is absent. This person should be capable of fulfilling most Departmental duties and make decisions on implementing the actions within this plan and directing the activities of key personnel to restore services.

Line of Succession					
Role	Name	Cell Phone	Secondary Phone No.	Email	Employee ID
Primary					
1st Successor					
2nd Successor					

Delegations of Authority

Specify who is authorized to make decisions or act on behalf of departmental leadership if they are away or unavailable during an emergency. In planning for delegations of authority, consider the following:

- Identification of which authorities can and should be delegated, e.g. service re-prioritization (if differs from the priorities within this plan), purchasing authority, represent department at senior level meetings.
- The circumstances under which the delegation would be exercised, including when it would become effective and terminated.
- Limitations of the delegation.
- To whom authority should be delegated.
- How and if designees are trained to perform their emergency duties.

Delegation of Authority		
Delegate	**Task**	**Limitations of Authority**
Jane Doe	(e.g. Relocation of critical samples in the event of compromised storage)	

Space Planning Requirements

Work Area(s) Information: Enter the locations where the primary program/service of your department is conducted.

Location #1		Room(s)	
Location #2		Room(s)	
Location #3		Room(s)	

Indicate the amount of each type of space currently assigned. Note any special conditions, e.g., computer labs, temperature sensitive space, large equipment, special power sources, require generator backup, areas to discuss sensitive information.

Space Planning			
Type	**Quantity**	**Square Footage**	**Notes**
Office			
Workspace			
Meeting Space			
Sample Storage			
Miscellaneous			

Contingency Planning: What plans are in place today that would help reconstitute necessary operations elsewhere if the primary work area is unavailable due to an event such as a storm, pandemic, etc.?	

Telework Capabilities

Some functions can be performed entirely or partially from home. Please list the names of employees, stakeholders, or volunteers who can do part or all of their work from home if they have adequate computers and high-speed internet access. Planning for remote work is critical for all personnel within the organization.

Mission Essential Program Functions

Essential program functions are defined as those specific duties or responsibilities that, if left unperformed, would substantially impact the ability of the organization to fulfill its mission. During the planning process, each department will identify essential functions. The following table contains the criteria that should be used to determine the recovery priority for each essential function.

Tier	Recovery Priority	Recovery Time Objective
1	IMMEDIATE These functions involve those with the direct and immediate effect on the project to preserve life, safety and protect property.	0 - 24 hours
2	CRITICAL These functions can be delayed until Tier 1 functions are restored but must be operational within 72 hours.	24 - 72 hours
3	NECESSARY These functions can be delayed until Tier 1 and 2 functions are established but must be operational within one week.	72 hours to 1 week
4	IMPORTANT These functions can be delayed until Tiers 1, 2 and 3 are operational.	1 week to 30 days

Your essential functions will serve as your guide for how to restart your operation following a disaster or major disruption. They help answer the question "What is the minimum level of service or activity my group must perform to still consider us to be in business?" By identifying and prioritizing your essential functions, you can determine which personnel, facilities, equipment, and materials are absolutely necessary to keep your projects functioning following a disaster or major disruption. Prioritizing your functions will also help you determine the recovery time objective and the length of time the function can be suspended without causing significant disruption to your operations.

Typical essential functions include, but are not limited to:

- Insert Essential Function Here
- Insert Essential Function Here
- Insert Essential Function Here

Essential Functions			
Function / Description	PI/Responsible Party	Recovery Time Objective	Priority
Example - Secure toxic and radioactive chemicals	Dr. Jane Doe, PI and/or Dr. John Doe, Radiation Safety Officer	Immediate	1

Vital Records, Files and Databases

Vital records are those that, if damaged or destroyed, would disrupt operations and information flow, and require replacement or re-creation at considerable expense or inconvenience. If the department is unable to access its primary facility or equipment during a COOP event, these resources must be accessed to ensure continuity of mission essential functions. The COOP Manager should reference their data management plan to identify the vital files, records and databases for each mission essential function, and note the storage location and point of contact for each resource.

Vital Records, Files and Databases		
Resource	Storage Location	Contact

Vital Document/Materials Preservation

Vital documents and/or materials may be susceptible to damage or loss depending upon the type of incident and format of those documents or materials. Contingency plans should be made to maintain duplicate sets of electronic/physical materials when possible or precautions should be taken to make material storage areas resilient to anticipated emergencies that could result in loss of power or other utility, controlled environmental conditions, or general access to the site. Please note any materials that are required to be maintained in its physical, original format where the loss of that physical document or item would negatively affect the organization position.

Vital Document/Material Considerations	Comment
Duplicate/Redundant Materials: Does the department have copies of primary data, databases, records, etc.? Where can backup copies be maintained?	
Supplies: Is a list of supplies vital to critical functions with 24-hour contact information available for all vendors?	
Alternative Suppliers: Have one or more alternative sources for supplies been identified, wherever feasible?	
Inventory: What is the average amount of inventory of critical supplies maintained in the work area, and how long will this inventory sustain critical function operations?	

Critical Systems

Critical systems include the information technology (IT) systems and software required to perform mission essential functions. It is important to identify, prior to a disruptive event, those IT systems necessary for the completion of mission essential functions. In this section, list the IT systems and software used by the department, including a description of the system or software, the name of the systems manager, the vendor or point of contact information. Include specialized software unique to the department.

Critical Systems			
System	**Vendor**	**System Manager**	**Contact Information**

Critical Equipment

Like critical systems, critical equipment includes specific equipment and instrumentation required to perform daily tasks. List all critical equipment that is used by the department/program below, the quantity of that equipment, the vendor for the equipment in the need of repair or replacement, and the contact details for the individuals who are responsible for this equipment.

Critical Equipment			
Quantity	**Equipment Details**	**Vendor**	**Contact Details**

External Contacts

Identify external resources necessary to maintain mission essential functions. This might include contacts for suppliers of critical materials, regulatory or oversight bodies, outside key stakeholders important to the mission of the organization, or community partners.

External Contacts					
Vendor/Stakeholder	Description of Resource	Contact Number	Email Address	Website	Notes

Regulatory Requirements

Identify any regulatory and compliance requirements (laws, regulations, organizational policy) that your department is subject to and what impact an emergency would have for compliance. Describe the precautions your group has established to ensure compliance throughout response and recovery. List any support requested to be able to comply with regulations.

Exercise Your Plan

Share your completed COOP with your staff. Hold exercises to test the COOP and maintain awareness. Note below the type of exercises you will use and their scheduled dates.

Type of Exercise	Frequency (ex. monthly, at the beginning of each semester, annually, etc.)