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Analysis of the CDF Early Learning Community Trust Process Phase I

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Full Report

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Executive Summary

The purpose of this report was to provide an external review of the participatory decision making process used in Phase I of the “Clarkston Families Decide” CDF Early Learning Community Trust (ELCT) conducted between July 2014 and January 2015. The reviewer’s primary purpose was to provide information about the process used to develop the project outcomes in Phase I that may be useful in the overall evaluation of the ELCT. The reviewer employed primarily a qualitative research methodology as the data sources were text and visual secondary data from pre-existing documents created during the process. The primary source materials used in this analysis were twenty-two (22) documents from ten (10) total (4 trust and 6 trustee) meetings that spanned seven (7) months. These documents include agendas and facilitator discussion guides from community trusts and trustee meetings, notes and summaries from small and larger groups in trust and trustee meetings, issue rankings, and project ideas with descriptions.

Based on the available literature and scope of the project, the reviewer conducted analyses on two levels (1) within meeting content analyses and (2) across meeting theme and overall process. The results of the analyses were broken down by session (e.g. individual meetings) and as an overall process below. There were two related processes: (1) Trust Process with Clarkston community and (2) Trustee Process with community members chosen by the initial Trust process. Although there was some overlap at various points in the ELCT process, the data are presented sequentially for the sake of clarity. Tables and other visuals are used when possible for ease of data presentation and photographs may be incorporated when appropriate as illustrative of the process.
The reviewer highlighted several outcomes from the "session-by-session" analysis of both the Community Trust and Trustee processes.

1. **Facilitation Process/Creation of Training Manual** - The changes to the written instructions/guide for facilitators, interpreters, and notetakers was an important development and should be seen as a significant outcome of the process. The manual has the potential to become both a useful training manual and a working hypothesis for community-based participatory decision-making processes in other contexts.

2. **Intentional Process Evaluation** – The optimal data collection strategy would likely include: a form for note-takers that would include spaces for number of participants, process, and content notes, languages spoken, and start and stop times for group; participant feedback forms or some other reflection on process and content from participants, that may include a facilitator evaluation form; well-written summaries of the large group discussion in the same way that small group discussions were recorded, these could be done by the large group facilitator or observer/administrator from CDF; and photographs or video clips that are designed to capture the experiences of all the participants across the whole process.

3. **Space matters** – The analysis of these process documents as well as a separate study conducted with ELCT participants by a group Emory Fellows reported issues regarding the use of space in the process. It was a challenge to find a space that is accessible, large enough to accommodate the large group and smaller group discussions, yet not so large that it makes it difficult to hear when people break into smaller groups. This is of special note given that this is a conversation and dialogue driven process.
4. *Language Interpretation and Cultural Knowledge* - Language interpretation and multi-cultural awareness/acknowledgement were crucial to the success of this process, to its continued success, and any considerations for replication in other context. What was less clear was the documentation on who and how interpretation took place during this process. In addition to the need to have people feel comfortable communicating in their own language, it is worth considering that groups created for convenience of language interpretation may run a higher risk of filtering or self-monitoring due to an intra-cultural mix often represented in resettlement communities (e.g. people from the same country who were on opposite sides of a conflict that led to their displacement). Written should all be translated and accurately reflect the verbal instruction given by interpreters to ensure accurate ranking and voting.

5. *Document Transition to and Processes of Trustees* - The reviewer’s analysis had to rely in parts entirely on the “Phase II Story of the Trustee Process” (Adams participant-observation narrative) and with fewer documents against which to triangulate this report, the likelihood that the understanding and interpretation of this phase was incomplete as much higher. This element should be viewed as just as crucial as the initial determination of the project from the trust meetings while the process is still being developed as it involves deliberation and implementation.

In sum, the CDF Clarkston Families Decide ELCT is an innovative implementation of a community-based participatory decision making model that focuses on a critical issue in a hyper-diverse community where there is little existing structure to support community dialogue. With careful attention to design and context, this model could be implemented in similar communities across the US and the globe.
Introduction

The purpose of this report is to provide an external review of the participatory decision making process used in Phase I of the “Clarkston Families Decide” CDF Early Learning Community Trust (ELCT) conducted between July 2014 and January 2015. The reviewer’s primary purpose was to provide information about the process used to develop the project outcomes in Phase I that may be useful in the overall evaluation of the ELCT. In order to achieve that ELCT process will be examined in the context of some noteworthy academic and professional literature on best practices on group and participatory decision making from conflict management literature (Ball, Caldwell, & Pranis, 2010) (Creighton, 2005) (Fisher, 2014) (Mintz & Wayne, 2014) (Susskind, 2005) (Weitzman & Weitzman, 2014).

The external review is taking three stages and this initial report fulfills Stage 1, which was outlined as:

The first stage will involve an examination the existing program evaluation data (e.g. 6 month report) with a view to placing that data into a context of best-practices in community engaged research, situate it within the family engagement and participatory decision making literature, and produce a short “response paper”. Data needed to conduct this initial phase could include any existing program evaluation materials and reports produced during the trust process. The evaluator would only review existing materials and neither would he create any new evaluation strategies/instruments, nor conduct any primary data analysis.

The external reviewer role was designed to work in collaboration with and support the role of CDF ELCT Project Director and CDF Evaluator to help fulfill the wider objectives of examining the application of best practices in participatory decision-making and family engagement in the ELCT. The review is being conducted in the service of the larger W.K.
Kellogg Foundation grant evaluation plan, specifically under Section 7 Part B outlined in the award letter, which reads:

B. How were participating families organized and/or mobilized into formal or informal networks in communities? How has the organization and mobilization of families impacted the outcomes of the Project? In what ways have these families and their networks influenced the system of early care and education?

The analysis of the process will help the overall evaluation of the project by highlighting some of the interactions that were the results of mobilizing the groups of people within Clarkston and develop an understanding of how the use of a participatory decision-making intervention model helped facilitate the final project.

The result of this analysis may also inform ELCT Phase II and hopefully improve outcomes for all participants. The following report uses the sequence outlined in this scope of work and lays the foundation for the next two stages of the external review, which includes providing the results of the report to those who engaged in the process and receiving their feedback.

**Methodology**

The reviewer employed primarily a qualitative research methodology, given that the focus of the research was on secondary data analysis from pre-existing documents both language-based and visual. The reviewer chose inductive content analysis of written documents and interpretive inquiry of the process, both used widely in qualitative research (Creswell, 2009). These strategies are important to outline because although he was not directly involved in the collection of the data, he was familiar with both the organization conducting the process (CDF) and the processes being used (facilitated group decision making). It is also worth noting that the reviewer’s familiarity with the organization and
the process meant that he analyzed the data from the point of view of an informed observer and was able to situate, contextualize, and analyze the data from multiple lenses. The stages of the review that follow this initial report will assist in removing some of the reviewer’s own biases and perspectives and help re-establish some of the views of those who were more directly involved, since they will focus on asking those reading the report to comment on its reliability and validity.

**Data sources**

The primary source materials used in this analysis were twenty-two (22) documents from ten (10) total (4 trust and 6 trustee) meetings that spanned seven (7) months. These documents include agendas and facilitator discussion guides from community trusts and trustee meetings, notes and summaries from small and larger groups in trust and trustee meetings, issue rankings, and project ideas with descriptions. A full accounting of these documents is included in Appendix 1.

Additional supporting documents were also referenced in order to provide some context and deeper understanding of the process and its outcomes. These documents included approximately two-hundred (200) photos from the community trust meetings and materials designed for the CDF website or other public sharing including: an 8-page narrative “story” of the trust process, stories from the CDF website about different trust meetings; information for and from advisory board meetings; and a website story about celebration event for the launch of the project resulting from Phase 1.

The researcher also includes information from and references to a report produced by the Emory Community Building and Social Change in the summer of 2015 (Burack, Chang, Hoffstein, Nam, & O’Brien, 2015) in the final sections of the paper. Some of the
information contained in this report helped to provided a more complete picture of the impact of the process on the participants and facilitators. The complete report provided more detail on range of projects that resulted from the ELCT process and should be viewed as a companion piece to this analysis.

**Analytic framework**

Based on the available literature and scope of the project, the reviewer conducted analyses on two levels (1) within meeting content analyses and (2) across meeting theme and overall process. Special note was played to space and language interpreters in the process.

- The within meeting analysis included: content analysis of all written documents, looking in particular for direct references to process related comments in notes and summaries; instructions to facilitators in guides; and any discussion of strengths and areas of growth related to the process in board meetings.

- The across meeting theme and overall process analysis was related to how the information within the documents either reflected consistency (organizational) or any recommendations made during the process (positive changes).

- Photographs were examined to better understand: the physical space/layout of the trust meetings, the diversity represented in the community, and to offer greater context for understanding comments or descriptions of process and space. The reviewer determined that the photos would be most helpful as illustrative elements of process information.

- Special attention also had to be paid to the role of language interpreters within this process since so many diverse language groups participated in the ELCT. As reported by
CDF staff, interpreters often played the role of “co-facilitator” in these groups, a theme that will receive more attention in the results.

**Results**

The results of the analyses are broken down by session (e.g. individual meetings) and as an overall process below. There were two related processes: (1) Trust Process with Clarkston community and (2) Trustee Process with community members chosen by the initial Trust process. There was some overlap at various points in the ELCT process, but these will be presented below sequentially for the sake of clarity. Tables and other visuals are used when possible for ease of data presentation and photographs may be incorporated when appropriate as illustrative of the process.

**Community Trust Meetings**

The community trust process was designed to “engage families with children birth to eight in participatory workshops and in an innovative decision-making process to equip them to take actions as leaders, resulting in positive changes in early learning systems and in their community.” In this first part of the process, the entire community was invited to participate as stakeholders and decision makers. In order to prepare, CDF used its previous experience in community meeting facilitation to design and working in the hyper-diverse community of Clarkston to select and train facilitators, interpreters, and note-takers for the groups. Prior to the first meeting and throughout the process, the Early Learning Community Trust (ELCT) team provided some training and created some documents to assist in facilitators with the process and translated materials into several different languages.
The “CDF Early Learning community Trust (ELCT) Agenda & Facilitators Guide” was the first document created for this process. It was developed as a “how-to” template for the process and was based on CDF’s previous work in facilitating community groups.

The agenda laid out a five (5) step process for the meeting including: opening (information and roles); a “gallery walk” that reviewed information from CDF’s other community trusts related to education; small group sessions with a facilitator to uncover themes; a large group session to begin prioritizing themes; and a conclusion to summarize and inform about future trust dates. This agenda follows a logical and evidence-based flow for facilitating large group meetings that involve collaborative and consensus decision-making.

The “Facilitator’s Guide for Small Group Discussions” goes into a little more prescriptive detail as to how the facilitators should behave during the meeting and how the process should take place. The guide focuses on using specific phrases (statements and follow up questions) and keeping to time limits for certain sections (10 minutes). These instructions are presumably to help maintain a consistent experience for participants and an overall time frame for the meeting. These instructions also keep the facilitators on pace with one another, which was important since it was unclear how many small groups would be necessary. There guide also included some specific instructions on how to handle duplicate issues (e.g. point to it if it’s already there or allow it since summarizing and ranking would come later) and certain things facilitator’s should not do (e.g. don’t make suggestions).
The notes from the small groups in this session showed that there were six (6) small groups, although notes were only available for five (5) of them (Groups 2-6). Of these groups two (2) were conducted in Arabic, one (1) Nepali/English, and two in only English. All five (5) groups had a lead facilitator, three (3) of the groups also had a note-taker, the three (3) non-English groups also had an interpreter, and two (2) of the groups also had someone serving as mentor/coach. It was noteworthy that one of the Arabic groups had all four roles (facilitator, interpreter, note taker, and mentor coach) and one of the English only groups only had a facilitator. For ease of this discussion, the reviewer will create a category of “assistant” to cover all non-primary facilitators, although interpreters may be singled out in the course of the analysis.

The remainder of the information in the small group notes focuses only on the content (answers to questions and themes) and contains no further process information. Examples of process information not included would be: number of participants in the group, length of time spent in discussion of topics, and any particular interventions or problem areas during the conversation. Given that the most likely purpose of the notes is to share the content, it is not surprising that this process specific information is missing and it is not clear if that information was collected in any other way (e.g. notes recorded through exit interviews or debrief with facilitators). A more thorough collection of that type of data during that phase of the process would aid in better understanding the nature of the process and in assessing its impact on the outcomes.

One additional source of information that does shed some light on this process were from the photographs taken during the first ELCT meeting. What can be seen in the photos missing from the written data were that the groups ranged in size from 5 to 17 (not
including facilitator). What is unclear from the photos is how many of the individuals in the circles are assisting in the process and how many are participants. The photos also show that the group meetings took place in what appears to be a gymnasium, the chairs were arranged in semi-circles with a facilitator in the front, facilitators wrote on a flipchart with a marker and pages were posted on the wall to be shared with each group, and the groups were approximately 10 feet apart in the gym. While it may have been possible to count all the people present at the meeting from the photos, having an overall number of attendees and a group by group breakdown would have helped in this analysis.

**ELCT 2 – Meeting August 7, 2014**

For this meeting, the reviewer analyzed three documents: small group notes, comments from feedback form, and an ELCT Article written by CDF after the event. The “agenda” and “facilitators guide” for the earlier meeting seems to have been used again for the August meeting, which seems to have taken a similar format to the July meeting. The purpose of the meeting was slightly different, as stated in the CDF article:

Five priority issues identified at the July Trust meeting were discussed and reviewed by the small groups. Then, participants ranked the five issues, from 1 to 5, with 5 being the most important. The numbers were counted, and the top priority was announced that evening.

In this ELCT meeting there were seven (7) small groups: one (1) Arabic & Somali; one (1) Arabic only; one (1) Burmese; one (1) Nepali; one (1) Amharic and Dinka; and two (2) English only groups. As with the earlier meeting, the levels of assistants in each group varied. All seven (7) groups had a lead facilitator, five (5) groups had a notetaker, and none had any additional interpreters. In this case, the reviewer must assume that the facilitator was also bi-lingual or that the groups were conducted in English and that the divisions
were national/cultural rather than linguistic. The article produced by CDF stated that there were “more than 100 participants gathered at the Clarkston First Baptist Church Family Resource Center.”

Information in the notes about one of the groups (the Nepali) stated that there were 14 participants and 3 interpreters. Including this information had value in assessing some elements of the process that could not be done in the July meeting or with the other groups in this meeting; however, it also led to a few observations/questions.

- The other groups may have included interpreters but simply not listed them as they did in the July meeting.
- Some of the participants may have also been acting in the capacity of interpreters, which may have impacted the responses of the participants or the information that the facilitator received because of self-monitoring or filtering by the interpreter.
- Some of the groups may have been working in multiple languages, dialects of a language, or in a cultural mix that could have led to filtering or self-monitoring that may have harmed either the initial idea development or ranking of ideas within the group.

Having these answers would assist in better understanding some of the process issues and group dynamics at play that could have impacted the outcome.

In the “Comments from Feedback Form”, participants were asked to respond to 3 questions: (1) What went well? (2) What did not go well with the meeting? (3) Do you have any suggestions or other comments about this meeting?

The responses to these questions provided some additional process data related focused on 3 areas: language interpretation; time; and space.
• **Language interpretation**: This seemed to be better in some groups than other as one group cited it as a “positive” and two groups cited it as a “negative”.

• **Time**: Two groups noted that either they would like more time to discuss the issues or that time could have been better used.

• **Space/Proximity**: Three of the groups noted that it was difficult to hear in their own group because of noise/voices from the other groups.

While some of these process issues seemed different than the first, the differences in data comparability between the two meetings made drawing some conclusions difficult.

Photographs from the 2nd meeting provide support to some of the reported space/proximity issues, but could not provide any evidence about the quality of the language interpretation or the participants’ perception of the adequate amounts time spent on topics. It was clear from both comments and photos that two of the groups were significantly larger than others, so it would be safe to assume that groups that large would have problems both hearing other group members and would be more likely to create more noise that may be disturbing within their group and between other groups.

The CDF article published in August also included information on the next steps in the process including what would happen at the next two meetings in particular that:

At the September 6 meeting, Community Trustees (50% families) will be selected. They will meet following the September 6 meeting to review the list of projects and will prioritize the top five or six projects based on need, feasibility, impact, and sustainability. These prioritized projects will be shared with residents at the next Trust meeting, scheduled for September 18, 6 p.m. at the Clarkston First Baptist Church Family Resource Center. At this meeting, residents will be invited to further review the projects and will use a forced ranking process to select one project to implement. Following the September 18 meeting, the Early Learning Community Trustees will develop a project implementation plan, including a budget and time table, with project activities beginning in January 2015.
Providing this level of detail demonstrated a transparency in the process to the community and an ongoing interest in inviting the community into the process despite it being halfway completed. That commitment to on-going improvement during the process would seem to suggest a focus on the quality of participants’ involvement in the outcome rather than fidelity to a particular prescribed process. The practice basis/rationale for making such modifications will be discussed later in the conclusions and recommendations.

**ELCT 3 – Meeting September 6, 2014**

For this meeting, the reviewer analyzed five (5) documents: Trust facilitators’ discussion guide; Notes; Summary; Trustees Fact Sheet; and Criteria for Projects.

The facilitator's discussion guide seemed to have undergone a complete revision in both formatting and attention to detail related to this process. The guide still contained an outline of the agenda, suggested statements and questions for facilitators, and timeframes for each part of the process; however, the information was more detailed and it really provided a script to the whole process not just the small groups. The direction it provided to the facilitators was both substantive (e.g. In pairs talk about what makes you most proud when you think about our community’s children? “What do they enjoy? What are they learning?” “How do they learn best?”) and more process oriented (e.g. Make sure your chairs are set up in a circle so all can see and hear each other. Let the group know the following: Everyone’s ideas will be heard; we will take turns...The facilitator is neutral. Their job is to make sure you have a good experience and that you are heard.) The guide also included a separate page of “Tips” for good facilitation and note-taking. While this was certainly not an exhaustive training manual, this was also not its purpose, it was a guide for a specific process that included reminders that would be important for even experienced facilitators.
The quality of the relevant process related information in the notes and summary for this meeting also seems to have undergone an upgrade as well. There were six (6) small group discussions, “more than 35 participants, speaking six languages” (Nepali, Burmese, English, Dinka, Arabic, Somali), and approximately 11 assistants (facilitators, note-takers, etc.). All six (6) groups had a primary facilitator, four (4) also had a note-taker, and while none officially listed interpreters, it seems that some of the facilitators/note-takers served as interpreters. Based on the available figures, the Nepali (10) and the English (11) groups appeared to have the largest numbers of participants; however, no other groups have actual figures listed and it is not possible to completely accurate count from the photographs. Childcare was provided for approximately 45 young children whose parents attended the meeting and this seemed to be an addition to the trust meeting process.

In this particular meeting, the trustees were also chosen and they were listed in the notes about the meeting. According to the Fact Sheet about Trustees:

Trustees are a group of people, including residents and others (e.g., non-residents, such as agency representatives, leaders, and policy makers) who are interested in early learning and volunteer to guide the project(s). A resident is defined as someone who lives in the 30021 zip code...
Trustees are selected by participants at the Early Learning Community Trust sessions on September 6 and 18. (Half will be selected on the 6th and the other half on the 18th.) Trustees can be attendees at the meeting or others who have skills, talent, and time to participate. CDF staff will contact individuals who are nominated and who are not in attendance at the Trust meetings, and invite them to serve.

The reviewer can only assume that the trustees were chosen based on the process outlined in the guide or in the "fact sheet" about trustees, as there is neither a descriptive account of the process nor any feedback from participants on the process. Lacking descriptive information, it was difficult to assess the participants’ satisfaction with either the process or the outcomes of ranking or choices of trustees; however, the report from the Emory
Fellows (Burack, Chang, Hoffstein, Nam, & O’Brien, 2015) provided more information on satisfaction, which will be discussed later in the report. More on the role of the Trustees and their decision making process will be covered later.

**ELCT 4 - Meeting September 18, 2014**

For this meeting, the reviewer analyzed seven documents: EL Trust facilitators’ discussion guide (Final); Notes (Draft); Notes (Final); Criteria for projects (Final); Notes & Trustees (Draft); Priority Issues Ranking (Final); Project Ideas with Brief Descriptions; and Phase I Story of the Trust (Adams participant-observation narrative).

This meeting was open only to residents of the 30021 zip code as the September 18 meeting was intentionally designed only for “residents”. Based on the available documents it was not clear how many people were present at this meeting, nor the size of the individual groups. The lack of this information for this session was in stark contrast to the September 6 meeting, in which detailed information was available for participants and even the number of children for which childcare was provided. In the narrative from Phase I written by CDF, the author states that “75 residents gathered to select the early learning project”, although it was unclear to this reviewer from where that number came. This suggests that this data collected by the author of that narrative or another data source existed to which the reviewer did not have access. It is also worth reporting here that, the Phase I story (Adams) reports:

This initial group of trustees (the number of which doubled at the final meeting) met prior to the fourth meeting and worked to merge, consolidate, and narrow down each of the language cohort’s list of projects. Reflecting on the priorities and interests of their respective cultural communities and the Clarkston community at large, the trustees worked to create a list of seven projects by combining those with overlapping ideas and eventually prioritizing by placing a checkmark next to their top choices on flip-chart paper around the room.
No other information about this meeting or the process that was used was made available to this evaluator so no observations or conclusions about that step in the process can be drawn.

Consistent with the September 6 meeting, the facilitator’s guide for this meeting provided detailed guidance for facilitators, notetakers, and interpreters on each stage of the process. The guide contained an outline of the full meeting agenda, suggested statements and questions for facilitators, and timeframes for each part of the process, providing both a script for the whole process and more specific instruction for their role in the small groups. The direction was substantive and process oriented, including separate pages of “Tips” for good facilitation, note-taking, and interpretation, down to level of specific questions to ask and even some suggestions of ways to work with colleagues. The level of detail provided seemed to emanate from the need to have a more goal-oriented, directed discussion of the proposed projects, in a shorter time frame.

The groups were again divided by either languages (Arabic, English) or countries/cultures (Dinka, Somali, Burmese, Nepali-Bhutanese), which seemed to be driven by the dual need for language interpretation and cultural separation. As stated above, it was unclear how many people were in each group and no photographs were available from this meeting.

Of special note in this meeting were the instructions that facilitators had about time frame for discussion, some of which might have a significant impact of the amount, level, and quality of discussion leading to the ranking and ultimately final decision making. For example, 15 minutes were provided for a starting “ice-breaker” type question while there were 20 minutes for group leaders (facilitators, note-takers, and interpreters) to read and
allow sufficient discussion for seven (7) potential projects decided by the participants and narrowed down by the trustees. The information and instructions for facilitators read:

**Section 2: We will discuss the early learning projects that have been selected by participants and narrowed down by Trustees – 20 minutes (6:45 pm - 7:05 pm)** During this time, we will further describe the project and identify its strengths to help us choose the best project. Your comments and insights will be useful in the design and development of whatever project is selected.

**Section 2: Review the projects one by one so that participants can understand them. Ask: What does the project mean to you? What are your ideas about this project? What are the project’s strengths?**

The projects are (discuss one by one):
- Provide child care scholarship programs in early learning centers for children whose families are not eligible for government funding
- Promote the use of curricula in early learning centers that include holistic education approaches (art, drama, math, music, etc.), are inquiry driven, project-based, and promote free explorations
- Create multilingual, culturally rich environments in early learning centers
- Recruit and train multilingual early learning teachers that reflect the languages of the community in the early learning centers
- Create a culture and language center within an early learning center
- Employ parents at child care centers, including as teachers and helpers
- Create family literacy kits and make them available to families in early learning centers

This time frame means that groups had less than 3 minutes per item to discuss each of the projects. This would seem to be a limited amount of time given the likely size of the groups and the amount of materials to be discussed. Based purely on averages, 75 total participants divided into 6 groups, would mean groups or approximately 12 to 13 participants and previous participation would suggest that some of these groups would be larger and some smaller. Based on the notes taken from six (6) of the small groups about each of the projects the following observations were made: only two groups provided notes on discussion of all seven projects; four of the groups provided no/very limited notes for at least one of the projects; and three groups skipped discussion of at least two of the projects.
While one can only make assumptions from this limited information, it does not appear that full consideration was given to all of the projects by each group. Comments recorded by note-takers at the end during the recommendations/suggestions phase by several of the groups seemed to support this observation (e.g. “More time needed for discussion” and “Not enough time to make informed decision” and “The reading was hard to hear and understand, it should be skipped”). One mitigating factor in this scenario was that written descriptions of the projects were provided to the groups, which although this would have provided information, would lack elaboration or chance for clarification from either the trustees who were present in each group (this is an assumption based on information in the Adams report) or the other group members.

In the next stage in this meeting, 25 minutes were allotted for rating the projects on the basis of the established criteria. It seems that the criteria for the projects were established at the Initial Trustee meeting held between meetings 3 and 4. As stated above, this evaluator has no information from that meeting so can not assess the process of developing the criteria. Facilitators provided the criteria to the participants.

- **Parent/Family Engagement:** Parents/families have a say in the design, planning, implementation, and evaluation of the project developed to address this issue. Parents/families receive information, tools, and opportunities to be engaged in their child’s early learning, and in the programs and services that impact their lives.
- **Impact:** The project affects many families and children, and makes a positive difference to children’s early learning.
- **Feasibility:** Is the project doable with the resources that are available?
- **Language and Home Language:** The project encourages the use of English while honoring the importance of home languages.

The participants were provided with sheet for voting using a forced-choice, ranking system that asked participants:
In the box next to each of the Priority Issues, please rank from 1 to 7. The higher the number, the better the ranking (7 = I like it the most, and 1 = I like it the least).

The instructions for the facilitators read:

- **Read each criteria.** Ask: *Which project best meets the criteria?*
- **Each person will then be given a ballot and asked to rank the projects. The highest ranking (the best) is #7 and the lowest #1.**
- **Give the completed ballots to the runner.**
  
  *Discuss the questions below under evaluation. Try to get short answers so you have time for multiple responses. Please record comments on the flip chart*

One potential point for misunderstanding that this evaluator observed is that the verbal instructions and the written instructions for participants were not consistent. While the verbal instructions asked participants to determine which project “best meets criteria” the written instructions asked the participants to rate it based on which one they “like the most”. In English, these are two different and possibly oppositional ideas and once translated into other several languages it is unclear if the same potential definitional confusion was present or if/how these concepts were clarified. In this case, the inconsistency of message between the verbal and the written instructions means that much of the responsibility for clarifying questions that likely arose from participants fell to the facilitators and interpreters. No notes regarding this (or a need for this) were available.

During this stage, group leaders were also instructed:

**Evaluation.** While the ballots are being counted, the facilitators will lead a discussion of four questions below - **12 minutes (7:30 pm - 7:42 pm)**

- What has been the best part of this process and the meetings for you?
- What has not gone so well?
- What have you learned or taken away from this experience?
- What recommendations would you make for the future?

Many of the evaluation question results focused on content although a few process comments were recorded. See Table 1 below.
Table 1 – Process Related Comments from ELCT Meeting #4

<table>
<thead>
<tr>
<th>Positive Process related Comments</th>
<th>Negative Process Related Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Good process – opportunity for learning about what’s happening in the community</td>
<td>• Meetings repeat the same thing</td>
</tr>
<tr>
<td>• Everything discussed was good – we felt welcome</td>
<td>• Meet frequently (once a month)</td>
</tr>
<tr>
<td>• Attendance from different people groups (cultures) was very encouraging</td>
<td>• Timing</td>
</tr>
<tr>
<td>• Very thankful for the work of CDF and translators/facilitators</td>
<td>• Our choice might not be chosen.</td>
</tr>
<tr>
<td>• Welcoming environment and food</td>
<td>• I wish we could pick many projects.</td>
</tr>
<tr>
<td>• Different Clarkston communities are coming together for our children</td>
<td>• Meetings on Saturday or Sunday only, 4 p.m. to 6 p.m. and morning 10 a.m. to 12 p.m.</td>
</tr>
<tr>
<td>• People and place: people are really polite</td>
<td>• More time needed for discussion</td>
</tr>
<tr>
<td>• Like facilitator and interpreter</td>
<td>• Not enough time to make informed decision</td>
</tr>
<tr>
<td>• Good food</td>
<td>• Start on time</td>
</tr>
<tr>
<td>• Got a chance to hear different languages</td>
<td>• The reading was hard to hear and understand, it should be skipped</td>
</tr>
<tr>
<td>• People from international communities</td>
<td>• Giving facilitators a 5 minute warning to move on would help (otherwise too abrupt)</td>
</tr>
</tbody>
</table>

In the final portion of ELCT meeting #4 the participants took 10 minutes to choose Trustees. The facilitator’s guide notes that this information should be provided to the participants:

At the last meeting, you chose Trustees who helped narrow down the projects and who will help guide the project implementation. Tonight, you will be able to choose additional Trustees, who are here tonight or who are not in attendance, but who have knowledge, skills, and time to share to help ensure the project chosen is a success.

The only information recorded about this were the names and contact information of those chosen. So, as with ELCT 3, one can only assume that the process was followed. It is noteworthy that the Arabic, Dinka, Somali, and Burmese groups two Trustees and the Nepali-Bhutanese and English groups chose one. It is not clear if this was simply a result of the process or a pre-determined ratio established by CDF.
CDF staff entered the data, processed the information, and announced the result to the assembled group. The project chosen was to “Recruit and train multilingual early learning teachers that reflect the languages of the community in the early learning centers”. With this project in mind and a new group of Trustees chosen, the community segment of the ELCT Phase I process concluded and the Trustee segment officially began.

**Trustee Meetings Process**

The full group of Trustees selected in the community trust meetings began their charge with a meeting in early October and engaged in a series of six (6) meetings between October 2014 and January 2015. The documents available from the majority of these meetings consisted almost exclusively of meeting agendas and minutes, with the exception of the October 13th meeting which also included a facilitator’s guide with some small group notes and an “annotated” agenda from October 28th, which included some action items discussed during the working group\(^1\).

**Analytical Strategy**

Given the comparatively limited written information about how discussions took place, lack of photographs, or participant evaluations from the Trustee meetings, it was not possible to review these meetings in the same way as the Community Trust meetings. Because of the different nature of these meetings and data, the reviewer decided to undertake a slightly different analytic strategy. While the reviewer still examined all relevant documents in detail to explore process related information, this analysis required more interpretation and larger view of this segment of the process in relation to the previous one and the overall project goals and objectives. In other words, as much as

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\(^1\) See Appendix I for list of all data sources reviewed
possible the reviewer will refract these meetings through the fundamentals of group and participatory decision-making. The reviewer's analysis had to rely more on the “Phase II Story of the Trustee Process” (Adams participant-observation narrative) and with fewer documents against which to triangulate this report, the likelihood that the interpretation is incomplete.

**Analysis**

The process with the Trustees appears as semi-structured business meetings in contrast to the Community Trust process. Meeting agendas and minutes suggested a high degree of information transfer from CDF staff (especially Lewis and Malavenda), guest presenters (e.g. International Rescue Committee, Georgia Piedmont Technical College, etc.), and Trustees who presented information based on action items from additional “work group” meetings. While the analysis below will not follow a meeting-by-meeting review, the reviewer begins below with the first meeting as it laid out the charge and the questions on which the Trustees worked.

According to meeting minutes the role and task of the Trustees were recorded on October 2, 2014 as:

3. **Trustee Role:** Jeremy discussed: “why are we here tonight?”
  - Trustees were chosen by Trust participants
  - You are “trusted” to take the next steps and to make decisions:
    - How do we move forward?
    - Who should be involved? What criteria will we use?
    - Who does the work?

This then led to a facilitated discussion of the issue (“There are quality early care and education centers serving Clarkston families, where home language and respect for culture are an integral part of the curriculum, and where families are trained and employed as
aides and teachers”) and the project (”Recruit and train multi-lingual early learning teachers that reflect the languages in the early learning centers”) as identified by the participants in the Community Trust meetings. The Trustees discussed key questions/issues in the process (1) How do we “recruit” individuals to be trained as teachers? (2) Training – what credentials are needed? (3) Multilingual (4) Early Learning (5) Centers. Based on analyses of the Trustee responses in the October 2nd and subsequent meeting minutes and notes, many of these questions/issues became action items that became the purview of specific working groups. This first meeting also resulted in a “parking lot” sheet that was transcribed which, in addition to substantive questions, raised a few important process questions including:

- Can we conference call or Google Hang out Trustees who can’t physically attend meetings?
- What happens if Trustees need to miss multiple meetings?
- How will Trustees make decisions as a group?

Additional exploration of written materials did not provide answers to these questions; however, it was clear that a few Trustees were absent at each meeting and there was no mention of a technological solution, any penalty for absence, or a set of ground rules.

The 2nd meeting (October 13) called a “Next Steps Working Group” was the most similar to a Community Trust Meeting as it involved a facilitator/interpreter/note taker guide (suggesting that there were people fulfilling these roles) and small group discussions of substantive issues. This meeting resulted in the development of 3 working groups based on “a prioritized list of information needed”, which was developed during the October 13th meeting. These groups were smaller (4-5 participants), multilingual (2 required interpreter or a Trustee served in that capacity), had at least one additional meeting scheduled, and were charged with specific goals.
It was clear from the subsequent meeting minutes (10/28, 11/10) that Trustees were active outside of the meetings based on the working groups (e.g., gathering information about educational opportunities, developing surveys); however, no specific information was available about the processes that occurred in these meetings. Follow-up information from CDF staff (Malavenda) reported that most of the written information about the work group was available since much of it was conducted “via email,” but it was not in the original scope of the documents provided for this project. All of this information suggested a high degree of participation in the overall process. The 10/28 meeting was not highly attended (5 Trustees, 5 interpreters, and 5 CDF staff members) but members briefly reviewed the action items discussed at the two work group meetings on Oct. 22 and 25 and covered some informational items about work in service of the ELCT project (GA requirements for child care workers, list of Clarkston Child Care Centers, and developing survey questionnaire for child care centers).

In the 11/10 meeting, there was a high degree of participation (12 Trustees, 2 resident guests, 5 interpreters and 3 CDF staff and plus 18 children) and involved both informational items from past meeting (e.g., the development of a survey) and updates from other working groups. Two important process points that directly involved Trustees were:

(1) Trustees volunteered to visit local child care centers, and
(2) Trustees were asked: If you were designing a workshop for teachers, what would you want to be sure was included? What would you want teachers to know (both the multilingual teachers and the English speaking teachers?) The responses were recorded on a flip chart.

Trustees were able to generate a long list of points, only a few of which were specifically related to language and cultural diversity, many were more fundamental to basic child care issues like health, safety, and behavior.
An announcement for a December 2, 2014 meeting was included in the 11/10/14 minutes, but no other information (agenda or minutes) about that meeting was provided to the reviewer. The only information available was in the Adams Phase II report, but it did not include numbers of attendees and nothing in it could be triangulated or validated through other documents or materials. The report noted:

The December meeting opened as trustees shared about themselves and what they had learned from their experience as trustees thus far. Their words made clear that these meetings helped birth many unintended but positive consequences, ranging from learning new English words, gaining confidence in interacting in mixed-gender and multicultural groups, learning about each other’s cultures and countries, and regaining a sense of purpose and goals.

There were some quotes from stories Trustees told and what seemed to be the most significant development.

...individual trustees reported back on their experiences of visiting various early learning centers and discussed three potential projects that might work towards their larger goal: a CDA course for 10-12 residents, providing stipends to enable volunteers to spend time gaining experience in early learning centers, and enhancement grants for centers to make them more welcoming of Clarkston’s diverse families.

This was apparently the meeting in which some of the specifics of the final projects were developed.

The following meeting was January 6, 2015 and was attended by 3 Trustees, an interpreter, a community partner, and CDF staff. This meeting seemed mostly informational; however a key point in the notes pointed to the final direction for the funds, for a Child Development Associates (CDA) workshop. The notes stated:

- The group discussed the proposal that has had the most interest – to use the majority of the Trust funding for a CDA workshop for up to 12 participants, most of whom had limited English but who had experience or interest in working in
the early learning field. The CDA workshop would be conducted by Georgia Piedmont Technical College, Department of Continuing Education, would be free to selected participants. There was consensus that this was the project to be funded with Trust funds.

Attendance at the final Trustee meeting (for which the reviewer has notes) included 4 Trustees, plus 7 community partners and other residents, and 3 CDF staff. It was unclear whom the community partners and other residents were or what their roles in the process were or could have been. The meeting was primarily a review of the specifics of how the CDA project would be implemented

**Limitations**

The limitations of this analysis were based in the limitations of the source materials available, which included the best available documents. Many of these limitations have been outlined above. Some of the limitations may be able to be addressed by existing documents created by the process and already available. Other limitations relate to the scope of the work as defined by the reviewer and the CDF staff. It was difficult to anticipate what information would be needed or important when attempting to uncover “the process” that was used in the ELCT. In that sense, this was very much an exploratory study into a process that has its roots in other participatory decision making and consensus building processes (Ball, Caldwell, & Pranis, 2010) (Creighton, 2005) (Kaner, Doyle, & Lind, 2007) (Mintz & Wayne, 2014) (Susskind, 2005) (Weitzman & Weitzman, 2014)) and is rooted in understanding of interpersonal and intergroup conflict (Fisher, 2014). Part of the intention of the review was to look at the process in relation to those other processes and concepts, but the amount of data required to process even a basic understanding of the ELCT meant that there was not time to do a thorough review of the literature. A future project should
take the result of this analysis and place it in context of literature sources listed in this report.

Design, monitoring, and evaluation (DME) is a significant challenge in most community-based projects since “doing” the work is often the most pressing concern and considerations of how altering program design to fit the needs of the group will change the potential outcome of the process is of less concern that making sure it “works”. This is the paradox of “fidelity to the model” versus “achieving intended outcomes”. In these situations, the best-intentioned evaluation plans are often discovered to be ineffective in their first attempt. Future applications of this community based participatory decision-making model will attempt another evaluation strategy, which will also have its flaws, and will hopefully learn from the past with an eye to the future.

**Conclusions**

This reviewer drew on several key observations coming from the session-by-session analysis of both the Community Trust and Trustee processes.

1. **Development of the Facilitation Process/Creation of Training Manual** - The changes to the written instructions/guide for facilitators, interpreters, and notetakers was an important development within the process. The improvements in the level of detail in the instruction and helpful tips seemed to demonstrate reflective practice, best practices, and participant focus. One point that was unclear was why the level of detail improved during the development of the facilitators, interpreters, and notetakers guide. It is possible that the guide developed as a result of need (e.g. demand from facilitators, notetakers, and interpreters OR CDF’s desire to offer a more consistent process) or the
development of the stages of the process itself (e.g. increasing level of facilitator
directiveness and process structure were required as the process progressed). This
evaluator suspects it was likely a combination of the two and will be exploring this
question with CDF staff during the next stage of this evaluation.

The facilitators guide document should be seen as a significant outcome of the
process since the creation of these documents has the potential to become both a useful
training manual and a working hypothesis for community-based participatory decision
making processes in other contexts. If it is the intention of testing the Community Trust
model developed by CDF to be applied in different communities to different issues, the
guide should be viewed as the basis for this model. The material/model should also be
the basis for future evaluation strategies. In addition, having adequately trained
facilitators who are familiar with this particular model coupled with a more general
facilitation training would seem to provide the best opportunity to test the “fidelity of
the model” that has been developed through this experience.

2. **Intentional Process Evaluation** - While no one meeting or event had all the necessary
elements to understand the process, the most complete data collection included photos
and other “informal” documents (e.g. stories for the website, emails to facilitators, etc.)
that were collected for other purposes. When gaps in the official notes or other written
documents created questions, the reviewer often went to the photographs from the
Community Trust meetings to fill in the gaps in understanding how the process
(literally) looked. Taking parts from each, the optimal data collection strategy would
likely include: a form for note-takers that would include spaces for number of
participants, process, and content notes, languages spoken, and start and stop times for
group; participant feedback forms or some other reflection on process and content from participants, that may include a facilitator evaluation form; well-written summaries of the large group discussion in the same way that small group discussions were recorded, these could be done by the large group facilitator or observer/administrator from CDF; and photographs or video clips that are designed to capture the experiences of all the participants across the whole process.

3. **Space matters** – The Community Trust meetings were primarily held in a gymnasium. A space that was large enough to facilitate the size of the groups who were present (over 100 in some cases with group leaders); however, it also seemed to pose some problems. In ELCT 2 three of the groups noted that it was difficult to hear in their own group because of noise/voices from the other groups. There were also positive comments from other meetings (ELCT 3 & 4) groups noted that they “felt welcomed” and they like the “place”. It is certainly a challenge to please such a large group of people and to find a space that is accessible, large enough to accommodate the large group and smaller group discussions, yet not so large that it makes it difficult to hear when people break into smaller groups. The reviewer only raises the point because practitioners are keenly aware of the importance of space and the impact it can have on attendance, participation of group members, and ultimately the decisions made. The results from discussions with ELCT participants in the Emory Fellows report (Burack, Chang, Hoffstein, Nam, & O’Brien, 2015) also noted that the space was an issue for the participants, especially as it related to acoustics, noting that “many had difficulty hearing”. This is especially problematic given that this is a dialogue driven process.
4. **Language Interpretation and Cultural Knowledge** - The documentation on who and how interpretation took place during this process is not clear. What is clear is the importance of language interpretation, as well as, multi-cultural awareness/acknowledgement in this process within this particular community context. The results of the Emory Fellows report supported these conclusions noting that “preparation for facilitators and interpreters not sufficiently attended” and “facilitator-interpreters mainly linguistic-ethnic insiders” (Burack, Chang, Hoffstein, Nam, & O’Brien, 2015) p. 14). Why this is of concern, as it related to the process, is the higher likelihood of social desirability bias impacting the information that the facilitator received because of personal self-monitoring and/or cultural filtering by the interpreter. Some of the groups may have been working in multiple languages or dialects of a language, which could also impact quality.

In addition to language, it is worth considering that in communities where resettled persons live an intra-cultural mix is often represented (e.g. people from the same country who were on opposite sides of a conflict that led to their displacement). These groups created for convenience of language interpretation may run a higher risk of filtering or self-monitoring that may also harm either the initial idea development or ranking of ideas within the group.

The voting process for the final trust meeting (ELCT #4) had what appeared to be two different sets of instructions. The verbal instructions asked participants to determine which project “best meets criteria”, while the written instructions asked the participants to rate it based on which one they “like the most”. While most likely nothing more than an error, the potential for misunderstanding here, especially
considering the multiple languages and levels of literacy within those languages, provided the possibility that interpreters and facilitators could have seriously impacted the decisions that participants made since they would have been acting in a clarifying role. While this ultimately may not have changed the outcome in this process, future voting procedures should have consistent information in all forms and formats to ensure total understanding of all participants. Additionally, any clarifying questions asked or comments made by official facilitators, interpreters, or staff should be recorded since misunderstanding among an entire group may significantly impact the entire outcome of the vote.

5. **Transition to Trustees** - The difference in the amount and quality of the process-based information from the Community Trust meetings to the Trustee meetings was striking. Given the comparatively limited written information about how discussions took place, lack of photographs, or participant evaluations from the Trustee meetings, it was not possible to review these meetings in the same way as the Community Trust meetings. Because of the different nature of these meetings and data, the reviewer needed to undertake a slightly different analytic strategy. The reviewer’s analysis had to rely in parts entirely on the “Phase II Story of the Trustee Process” (Adams participant-observation narrative) and with fewer documents against which to triangulate this report, the likelihood that the understanding and interpretation of this phase is incomplete is much higher. This result lead to some questions of CDF staff about the process and some additional data needs, as well as, some opportunities to further refine the model for future use.
Revisions based on Feedback from CDF Staff

After an initial draft of this report was provided to Roberta Malavenda, Education Director at CDF, she provided some additional information and sources of information that provided some clarity to several of the issues raised above. The information that was readily available was incorporated into the preceding report; however, the reviewer felt it was important to outline below that some additional information would ultimately be helpful in developing a more complete reporting of the process.

The list below outlines some of those data sources and the status of those. It should also be noted that most these data would likely only enhance the current analysis. The purpose of the initial analysis was to understand the process and to provide information that could be useful in designing an evaluation strategy for a Phase II of the ELCT. Since that process will not occur, these sources should be seen as advisory for anyone else considering a replication of this or development of a similar process.

1) A copy of the memorandum of understanding with the company that provided interpreters - This would provide some additional information about the outlined roles of interpreters in addition what was included in the Facilitator’s Guide. In full disclosure, although the interpreters were paid, the facilitators were not, which could have had an impact on the types/quality of facilitators. Most groups had unpaid recorders as well although some facilitators chose to do their own recording.

2) Group leader training materials/notes – The reviewer learned from CDF staff feedback that there were orientation sessions with some of the facilitators, recorders, and interpreters prior to several of the sessions. An examination of the agendas and other materials from those would provide some context for how these people were trained.
3) **Explanation of the forced-ranking/decision-making process** - Jeremy Lewis guided the decision-making process (use of dots, then forced ranking. The charts of the rankings and the theme ranking (in the Kellogg report) became an important part of the process itself. An explanation of this process would fit nicely into the section on the process since it became the way that people’s “votes” were tabulated, in effect this was ultimately how decisions were summarized and interpreted. The question would be, “How accurately did the ranking process reflect the intentions of the group?”

4) **Additional documents related to Trustee meetings and working groups** - Roberta Malavenda reported “I sent many emails in between meetings to the interpreters and to the partners, sometimes summarizing, sometimes laying the ground for the next trust dialogue...The ongoing communication with all parties was part of the "process" --- how frequent, how effective?

5) **Evaluation of Meetings and Trustee process** – A primary data source that would be of great value would be an evaluation (questionnaire/interview) with as many participants as possible and the Trustees about the initial community meetings an the Trustee process. The questions should focus on how involved they felt in the process, how invested they were in the final outcomes and the projects chosen. This seems particularly important for the Trustees since no such information exists and the levels of participation of the Trustees seemed to dramatically drop off as the process concluded. One potential existing source reported by Roberta Malvenda were, “…reports from the partners who helped recruit and support residents participating in the Trust process...The reports are brief but have some good observations.” These may ultimately be helpful in giving some more information about the residents’ and
community members perspectives.

6) Emory Community Building & Social Change Fellows Report – Although referenced several times in the review thus far, it is worth noting here specifically, that the Emory Community Building & Social Change Fellows (ECBSCF) report completed during the summer of 2015 should be viewed as complimentary to this one (Burack, Chang, Hoffstein, Nam, & O’Brien, 2015). The ECBSCF interviewed 24 community members, most of whom had been participants in the ELCT process and contained representation from all groups (participants, facilitators, interpreters, etc.). These results supported the majority of the recommendations contained in this report and included below is a list of overlapping results/recommendations between the two reports.

- Spatial issues, such as the size and arrangement of groups, made the process less inviting for some participants, especially because it made it hard to hear instructions from facilitators and comments from other participants. The risks-rewards of large rooms and large group for acoustics and quality of discussion should be considered.

- Interpreters were often used a “gatekeepers”, so were involved in recruiting participants, and thus played dual roles. In the ECBSCF report this was framed as a positive in terms of “cultural literacy” and in this report as a potential for filtering, self-monitoring, or social desirability bias of the participants since the interpreters was also someone known to them. The risks-rewards of this approach should be weighed in future Trust Processes.

- Training of facilitators, interpreters, and notetakers was an issue raised in the results of both research reports. Ensuring adequate and ELCT specific
training for all those involved is crucial for future processes.

- The Trust meetings and the Trustee Meetings were framed differently for those participating and did not seem to be part of the same process. Reminding participants of the “full” process and ensuring ongoing participations (even if it is only information sharing once the Trustee process begins) for community members throughout the ELCT process is important.

- The Forced-Ranking Decision Making process was a transparent process that was clear in the outcomes (e.g. projecting the results on the screen directly shared the information on the spot with the participants); however, the process by which these ranks were determined (e.g. not enough time to discuss the issues, unclear directions) and the communication of the results after the end of the process (i.e. once the trustees took the lead) were less satisfactory for participants.

As stated above, these results, analyses, and recommendations should be considered in relation to the full ECBSCF report for complete description.

**Final thoughts on participatory decision making and family engagement**

Ultimately, participatory decision making in a community context and family engagement (as WK Kellogg Foundation defines it (W.K. Kellogg Foundation, 2013)) are compatible because they challenge non-professionals to become involved in the decisions that most directly impact their lives and the lives of their children in their community. Both
of these ideas value empowerment and use structured processes to validate the knowledge and wisdom of groups.

When parents participate in democratic civic processes, especially those who come from marginalized groups or from home countries where democracy is not the principle form of government, they develop and exercise important skills that they can use to impact their communities and the lives of their children. The Clarkston Families Decide ELCT should be viewed as a model for other communities interested in engaging their citizens to learn about the most pressing issues, to allow them to generate ideas on how to address those issues, and engage in direct decision making that creates solutions to those issues. While CDF will ultimately modify some elements of the model based on the feedback from this and related reports, the core elements of the model that made it successful should remain. If the Community Trust model developed by CDF is applied in different communities to different issues, the guide should be viewed as the basis for this model. The material/model should also be the basis for future evaluation strategies. In addition, having adequately trained facilitators who are familiar with this particular model coupled with a more general facilitation training would seem to provide the best opportunity to test the “fidelity of the model” that has been developed through this experience.
References


Appendix 1 – Documents used in Analyses

Primary Documents
July 12, 2014
1. CDF Early Learning community Trust (ELCT) Agenda & Facilitators Guide
2. CDF ELCT Small Group Notes

August 7, 2014
3. Small Group Notes
4. Comments from Feedback Form
5. ELCT Article

September 6, 2014
1. Trust facilitators discussion guide
2. Notes
3. Summary
4. Trustees Fact Sheet
5. Criteria for Projects

September 18, 2014
6. Notes (Draft)
7. Notes (Final)
8. Criteria for projects (Final)
9. Notes & Trustees (Draft)
10. Priority Issues Ranking (Final)
11. Project Ideas with Brief Descriptions

October 2, 2015
12. Trustee Meeting notes
13. Trustee Meeting Parking Lot

October 13, 2015
14. Facilitator Guides for Next Steps Working Meeting
15. Trustee Next Steps Work Groups
16. Trustee Meeting notes

October 28, 2014
17. Trustee Meeting Annotated Agenda
18. Trustee Meeting notes

November 10, 2014
19. Trustee meeting Notes Final
20. Trustee Meeting one page update
January 6, 2015
   21. Trustee Meeting notes Final

January 20, 2015
   22. Trustee Meeting Notes Final

Supporting Documents
Phase I Story of the Trust Process, a participant-observation narrative, written by Janelle Adams
Phase II Story of the Trustee Process, a participant-observation narrative, written by Janelle Adams
Memorandum of understanding with the interpreter company
Appendix II – Information for Facilitators, Note Takers, & Interpreters

Facilitator Tips

• Before the session, carefully review the facilitator guide and handouts.
• Speak slowly and distinctly. Allow time for the interpreter to translate if you have participants who do not speak English.
• Briefly review the community agreements (ground rules).
• A timekeeper will notify you when you have 5 minutes left.
• You may have an assigned note taker, or you may want to appoint one.
• The group does not have to come to agreement.
• Make sure everyone can get their words on the easel as they intend them.
• Facilitators should work to remain neutral.
• Remind the interpreter that he or she should remain neutral.
• Disagreement is normal and ok. We want to know everyone’s thoughts and ideas.

The Art of Taking Notes

• Capture the main ideas & themes in bullet point format, not every word. A verb usually helps.
• Check with the speaker and/or group to make sure the notes you write down are correct.
• Ask the group to indicate ideas to circle that seem to have good support in the group.
• Alternate marker colors when writing so the ideas will stand out.
• Use the words of the speaker as closely as possible. Be careful not to alter the intended meaning.
• Write neatly so everyone can read the notes.
• Identify each set of notes with a clear title (use the issue as a heading).
• Be aware of times when recording is not appropriate (for example, when people are sharing personal stories).

Please write your name and e-mail and your facilitator’s name and email, if possible, on the first page of the notes in case we have a question. PLEASE LEAVE PAGES ATTACHED TO FLIP CHART.

Interpreter Tips

• Before the session, review carefully the facilitator guide and other handouts.
• Introduce yourself to the group and describe your role.
• Remind the participants that your role is to remain neutral, and to interpret what the facilitator and the participants are saying.
• Interpret during the opening session and at the closing session as well as in the small groups.
• Translate exactly what is said by the session facilitators, small group facilitators, and participants.
• If you do not know how to translate a word or a concept, ask the facilitator to explain it in other words.
• If participants ask for clarity, ask the facilitator to repeat or to clarify. Do not try to clarify yourself.
• Do not have side conversations with the participants.
• Help participants speak to the entire group.
• Help the note taker capture the words spoken by the participants. If you see something is missed or not correct, please let the facilitator or note taker know during the meeting.
• Interpreters cannot complete a ballot or be a Trustee, even if you are a resident of Clarkston. You have another important and specific role in this process.

(ELCT 4 – 9/18/14)