WHY METRICS? WHY NOW?

The 2008 election of President Obama seemed to signal a breakthrough moment for progressives...

- Unprecedented scale of grassroots action and activism
- New sense of hope and possibilities among communities of color
- Traditional and new forms of organizing and leadership development

Source: Vincent Laforet for Time
http://www.time.com/time/photogallery/0,29307,1872698_1827454,00.html
..but a groundswell of activism erupted – and disrupted – from a movement with a very different set of values and visions.

Is this a moment or a movement?

Depends on how we build on the momentum to turn protests into policies, activism into advocacy, and dialogue into democracy.
Having the movement to match the moment requires patient investment in long-term base building that builds capacity at three levels:

- and evidence is needed that building a base and forging a movement makes a difference.

And so a viable set of movement metrics needs to capture activities and outcomes at three levels:
1) Align the evidence foundations increasingly need to justify investments with the outcomes of base and movement building organizations.

2) Supplement traditional metrics of transactions (how many members) with critical yet less visible transformations (pivoting to new issues).

3) Offer relevant directions for funders and organizers about metrics as one way to close the translation gap.

PROJECT OVERVIEW
WHERE WE STARTED:

WHAT WE’RE BUILDING ON:

Organizations
Alliances
Social Movements
Large-Scale Social Change
PROJECT OVERVIEW

WHAT WE DID:

1) LITERATURE REVIEW:
   - Academic literature on social movements, organizing, and outcomes
   - Reports and tools from the fields of evaluation, philanthropy, and organizing

2) CONFERENCE CALLS with 10 social movement leaders and 13 funders to get early input

3) INTERVIEWS with 21 social movement leaders

4) PREVIOUS INTERVIEWS (70+) from past projects

5) CONVENING with 19 social movement leaders to get feedback on a draft framework

WHAT WE FOUND:

1) The field is changing: Organizers are eager for a common language and framework for metrics for movement building

2) Philanthropy is changing: Funders are looking for the evidence to make the case that movements matter

3) Translation not enough: While there are gaps to bridge and better communications could help, co-creating the new metrics of movement building is needed
PROJECT OVERVIEW

WHAT WE OFFER:

1) A framework for metrics that captures transactions and transformations with examples for ten strategies

2) Recommendations for a new approach to metrics that transcends organizations and drives towards movement building

3) Suggestions for a new relationship between movement builders and funders to develop a common language to reach common goals

TRANSACTIONS and TRANSFORMATIONS

A FRAMEWORK FOR METRICS THAT MATTER

<table>
<thead>
<tr>
<th>TRANSACTIONS</th>
<th>TRANSFORMATIONS</th>
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<tbody>
<tr>
<td>• What is easier to count that counts</td>
<td>• What is harder to count yet counts</td>
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Not everything that counts can be counted, and not everything that can be counted counts.

Albert Einstein
SAMPLE METRICS for 10 commonly-used strategies:

**SIGNING UP:**
- Organizing
- Civic Engagement
- Leadership Development
- Campaigns

**SKILLING UP:**
- Communications and Framing
- Traditional and New Media
- Research and Policy Analysis
- Organizational Development

**SCALING UP:**
- Alliance Building
- Movement Building

The New Deal wasn’t won by economic experts. It was won by ordinary people who organized to create a sense of crisis and mandate for change.

Jean Hardisty and Deepak Bhargava, 2005
“Wrong about the Right” in *The Nation*
TRANSACTIONS and TRANSFORMATIONS

SIGNING UP
Leadership Development – Campaigns

<table>
<thead>
<tr>
<th>TRANSACTIONS</th>
<th>TRANSFORMATIONS</th>
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<tr>
<td>#, diversity, and capacity of leaders</td>
<td>Leaders’ ability to take up new issues</td>
</tr>
<tr>
<td># involved in campaign activities</td>
<td>Ability to put forth bigger demands</td>
</tr>
<tr>
<td>Demands and policies won</td>
<td>Capacity built for future campaigns</td>
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We need to balance campaign numbers with the real transformations that are harder to measure. How do you quantify a leader’s world view? Or you can win a policy but that’s not adequate to change society.

Kalila Barnett
Alternatives for Community and Environment

SKILLING UP
Communications and Framing – Traditional and New Media

<table>
<thead>
<tr>
<th>TRANSACTIONS</th>
<th>TRANSFORMATIONS</th>
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<tbody>
<tr>
<td>Stories collected</td>
<td>Members participate in and influence the public debate</td>
</tr>
<tr>
<td>Audiences reached</td>
<td>Seen as legitimate experts</td>
</tr>
<tr>
<td># of op eds and articles</td>
<td>Shift in public opinion</td>
</tr>
<tr>
<td># of blog contributors and clicks</td>
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In terms of messaging, we need to be careful not to move the debate farther to the right. Need to speak to the hearts and minds of those who are fearful but could change if they see positive actions.

Pablo Alvarado
National Day Laborer Organizing Network
**SKILLING UP**
Research and Policy Analysis – Organizational Development

**TRANSACTIONS**
- # of reports and briefs
- Members and allies involved in research
- Areas of expertise developed

**TRANSFORMATIONS**
- Ability to translate research into organizing strategies
- Responsiveness and agility
- Ability to innovate

So far our focus has been on building metrics for measuring changes in individuals and organizations, but how do we know if we are building movement scale?

**SCALING UP**
Alliance Building – Movement Building

**TRANSACTIONS**
- # and diversity of partnering groups
- Ally contributions
- Scale of reach – regional, state, national

**TRANSFORMATIONS**
- Take on others’ issues as one’s own
- Cross-movement relationship building
- Ability to scale up impact

“Are we making progress in building unity and a strategic agenda across difference that is more than a laundry list?”

Anthony Thigpenn
Strategic Concepts in Organizing and Policy Education
Social movements also change the people who participate in them, educating as well as mobilizing activists, and thereby promoting ongoing awareness and action that extends beyond the boundaries of one movement or campaign.

David Meyer, 2003
“How Social Movements Matter” in Contexts

TRANSACTIONS and TRANSFORMATIONS

Communities United: Protecting California’s climate change legislation

TRANSACTIONS
- # and % of contacts, supporters & votes
- # of individuals and organizations mobilized
- Vote results (62% vs. 38%)
- % of people who considering themselves environmentalists

TRANSFORMATIONS
- Climate justice framing that resonates with new constituencies
- Communities of color emerging as the new face of the environmental movement
- Collaborations between EJ and mainstream environmental organizations lay foundation for future pro-active work

TRANSACTIONS and TRANSFORMATIONS

Caring Across Generations Campaign

TRANSACTIONS

• # and diversity of coalition partners
• Turnout and participation at coalition events and convenings
• # and diversity of workers trained and provide public testimony
• # and diversity of individuals mobilized through coordinated campaign actions

TRANSFORMATIONS

• Previously-isolated workers feeling connected and empowered to speak up on multiple issues - from job quality and social security to immigration reform
• Communities of color and new organizational forms reviving the labor movement

TRANSLATIONS and TRANSLATORS

“The real question is: What will it take to create real, lasting social change in this country?”

Burt Lauderdale
Kentuckians for the Commonwealth

- Movement building is NOT about finding and replicating one model, network, or place
- Metrics are NOT the movement but the measure of the movement
- This is NOT an argument for complicated logic models or a cottage industry of evaluators
- Measuring the part is NOT the same as measuring the whole – and keeping eyes on the prize
TRANSLATIONS and TRANSLATORS

ADDRESSING THE TRANSLATION GAP

- **Build the movement metrics toolbox** - Progressive Technology Project, Alliance for Justice
- **Invest in movement capacity to develop and use metrics** - Partnership for Working Families, ISAIAH, PICO
- **Nurture leadership and leadership pathways** - Community Coalition, Working Partnerships USA
- **Link policy outcomes with broader social change** - New Orleans Workers’ Center for Racial Justice, Kentuckians For The Commonwealth, National People’s Action
- **Communicate transformational shifts** - Social Justice Leadership, National Domestic Workers Alliance

TRANSLATIONS and TRANSLATORS

CO-CREATE THE METRICS FOR MOVEMENT BUILDING

- **Support and capture innovation and experimentation**
- **Create space for organizations to work together towards a common framework**
- **Adopt a movement frame for visioning and evaluation**
- **Forge a new type of relationship between funders and movement builders**
METRICS – MOVEMENT – MOMENTUM

Is this a moment or a movement?

Metrics – not to stifle spontaneity – but to build lasting movement infrastructure to capture the momentum when it erupts...

...and to carry the vision, values, and virtues forward towards a more inclusive and just democracy.
TRANSACTIONS, TRANSFORMATIONS, AND TRANSLATIONS:
Metrics That Matter for Building, Scaling and Funding Social Movements

MANUEL PASTOR, JENNIFER ITO, RACHEL ROSNER, RHONDA ORTIZ