Stage 1: Decide to Scale Up

Shared Ownership	Spread	Depth	Sustainability

Milestones	**Some Things to Think About**
Convene Innovators	☐ Share leadership ☐ Broaden perspectives ☐ Dream big ☐ Acknowledge self—interest ☐ Encourage honest, shared exploration ☐ Acknowledge power differentials
Assess Readiness	☐ Know what is involved ☐ Gather the facts ☐ Evaluate your findings
Compile a Convincing Rationale for Scale-Up	☐ Develop a clear and succinct rationale for community schools as an innovation that works ☐ Highlight ongoing work at schools ☐ Make the case attractive ☐ Show that now is the time for scale-up
Broaden Collaborative Leadership	☐ Reach out ☐ Build internal relationships
Commit to a Motivating Shared Vision	☐ Craft a clear shared vision
Increase Visibility	☐ Promote existing community schools ☐ Use media contacts ☐ Arrange visits to existing community schools ☐ Create "brand awareness." ☐ Think regionally

Pitfalls

❖ Not taking the time to scan the environment to see what else is happening that could support or derail a community schools strategy.

❖ Failing to reach out to key leaders of other collaborative efforts whose assets are vital to the success of the community schools scale-up effort.

❖ Overlooking what is already happening in particular schools that could demonstrate the power of a scaled-up system of community schools.

❖ Neglecting the value of a powerful vision for mobilizing the entire community.

❖ Not being transparent about the work and aggressively seeking out additional stakeholders.

Notes:

How You Know You're Making Progress

Stage 1: Decide to Scale Up	
Collaborative Leadership	☐ An initiative is established that creates organized opportunities to meet, facilitates discussions, forges relationships, and provides continuous opportunities for feedback and reflection.
Results-Based Vision	☐ A convincing, evidence- based rationale for scale-up is clearly articulated. ☐ A clear and inspiring vision for a scaled-up system drives the initiative.
Data and Evaluation	☐ Partners use data to inform their decision to move forward.
Finance and Resource Development	
Alignment and Integration	☐ The initiative collaborates with other community reform initiatives working to achieve similar goals.
Supportive Policy	
Professional Development and Technical Assistance	☐ Partners participate in site visits, community forums, and other opportunities designed to familiarize them with the principles and practices of community schools, outline the assumptions and expectations of community-wide and site partners, and build common ground across the initiative.
Broad Community Engagement	☐ The system-wide initiative's name and logo are recognized and used throughout the community. ☐ Communication with the public occurs regularly through open meetings, social networking sites, television and radio spots, newsletters, flyers, posters, and so forth. ☐ Open meetings present community-wide data and invite feedback. ☐ Site visits to community schools for elected officials and potential partners as well as for initiative leaders, family members, and residents are well attended and designed to build community support. ☐ Two-way communication with state and federal officials is ongoing.

Notes:

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Stage 2: Develop an Operating Framework

Shared Ownership	Spread	Depth	Sustainability

Milestones	Some Things to Think About
Define Key Functions	☐ Clarify roles, responsibilities, and accountability mechanisms ☐ Provide extended opportunities for partners to discuss key functions
Distribute Leadership	☐ Assess and build leadership capacity ☐ Identify strengths and weaknesses ☐ Include site leaders in scale-up planning ☐ Develop key criteria for selecting an intermediary ☐ Consider the range of possibilities for intermediary entities ☐ Be flexible
Plan to Plan	☐ Identify resources for key planning functions ☐ Formalize intermediary role ☐ Develop an initial work plan

Pitfalls

❖ Putting too much leadership responsibility on a single individual or organization.
❖ Not thinking through how the same functions apply to various leadership levels even though functions will not receive equal attention at the same time.
❖ Ignoring the importance of defining benchmarks for partners' accountability to one another.
❖ Putting too much emphasis on dollars at the outset of planning and forgetting to look at how existing planning, research, and program development assets may be redirected to support the initiative.

Notes:

How You Know You're Making Progress

Stage 2: Develop an Operating Framework	
Collaborative Leadership	☐ The collaborative leadership group has defined key roles, responsibilities, and communication methods. ☐ Accountability for achieving indicators in functional areas is distributed among partners. ☐ An intermediary entity with norms, experience, and capacity consistent with the initiative's vision agrees to provide planning, management, and coordination across the initiative. ☐ Partners continue to expand participation and develop trust and ownership in a community- wide vision.
Results-Based Vision	
Data and Evaluation	☐ Data collection and evaluation are included as budget line items.
Finance and Resource Development	☐ Funding and resource arrangements for further planning are negotiated and MOUs established.
Alignment and Integration	
Supportive Policy	
Professional Development and Technical Assistance	
Broad Community Engagement	

Notes:

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Stage 3: Plan for Scale Up

Shared Ownership	**Spread**	Depth	Sustainability

Milestones	Some Things to Think About
Define Desired Results	☐ Specify short-term and long-term results ☐ Develop a results framework
Create a Results-Based Logic Model	☐ Create a shared results-based logic model, also called theory of change that guides planning, implementation, and evaluation
Prepare for Evaluation	☐ Make evaluation part of your planning ☐ Seek out technical assistance for the evaluation ☐ Decide what information you need to collect
Develop a Rollout Strategy	☐ Decide on the focus, direction, and scope of site-level expansion ☐ Build a working budget for an individual community school ☐ Develop a site selection process ☐ Select a site coordination approach ☐ Establish a timeframe for rollout ☐ Determine how to provide technical assistance at the site level

Pitfalls

❖ Underestimating the importance of using results and related indicators to drive the work of the community schools initiative at the community and site levels.

❖ Saying "we will get to evaluation later" when everyone is looking for early data, even though such a response may be inappropriate.

❖ Lacking a clear set of criteria for the selection of potential community schools for communication to all stakeholders.

❖ Overlooking the importance of determining whether a community partner or the school coordinates community and school resources at the site level.

Notes:

How You Know You're Making Progress

Stage 3: Plan for Scale Up	
Collaborative Leadership	☐ Staff convene discussions among community and site leaders to ensure buy-in to the community -wide vision, results framework, and rollout strategy. ☐ Site leaders participate in planning for results frameworks and rollout strategies. ☐ Lead agencies and local partners establish relationships based on a shared vision.
Results-Based Vision	☐ A community-wide results and indicators framework is in place and used to track progress. ☐ A rollout strategy, including a plan and time line for selecting community schools, is in place. ☐ Staff guide the development of a results and indicators framework
Data and Evaluation	☐ Partners facilitate data sharing through interagency agreements and necessary policy change. ☐ Data-sharing agreements are negotiated to allow all partners to review school and community-wide data on agreed-upon results/indicators. ☐ Evaluation strategies are designed to assess the systemic effectiveness of the initiative (creating a shift in ownership, spread, scale, and sustainability) as well as progress toward results for children, families, schools, and communities. ☐ Evaluation designs include comparison schools and show longitudinal trends to the extent practical.
Finance and Resource Development	
Alignment and Integration	☐ Community partners participate in developing the school system's strategic plan. The school system's plan reflects the results framework. ☐ The results framework supports the school system's strategic plan. ☐ Conversations are convened to ensure that district school plans incorporate community schools principles as related to the results-based framework. ☐ RFPs and MOUs underscore the importance of alignment of resources to attain specified results.
Supportive Policy	
Professional Development and Technical Assistance	
Broad Community Engagement	

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Stage 4: Plan for Sustainability

Shared Ownership	Spread	Depth	**Sustainability**

Milestones	Some Things to Think About
Build Financial Capacity	☐ Calculate costs for school-site planning and management ☐ Calculate costs for programs and services ☐ Be entrepreneurial ☐ Support the collaborative leadership structure through intermediary services and other costs
Build Political Capacity	☐ Develop site teams, the core of site-level implementation ☐ Support activities that provide roles for families and community residents ☐ Listen more, talk less ☐ Develop champions ☐ Reach out and communicate

Pitfalls

❖ Thinking that running a community school is all about money and programs rather than about focusing on the importance of mobilizing families, residents, business and civic organizations, and the broader community in support of agreed-upon results.

❖ Not being willing to ask the hard questions about how existing resources are used, whether they are achieving the desired results, and whether something needs to change.

❖ Not realizing that building a system of community schools is inherently more a political than technical challenge.

Notes:

How You're Know You're Making Progress

	Stage 4: Plan for Sustainability
Collaborative Leadership	
Results-Based Vision	☐ Partners continue to expand their participation and develop trust in and ownership of a community-wide vision. ☐ Staff facilitate expanded participation, trust, and ownership in a scaled-up vision of community schools.
Data and Evaluation	
Finance and Resource Development	☐ A long-range financing strategy is in place. ☐ Reliable funding streams are coordinated to sustain priority programs and services at community schools. ☐ Community partners play a significant role in identifying and leveraging new revenue sources. ☐ Financing decisions ensure that expansion does not threaten core components of the initiative. ☐ Resources are earmarked to finance a community school coordinator position at each site. ☐ Technical assistance helps partners develop a long-range financing plan to harness existing public and private resources and to secure new funding sufficient to meet projected costs of scheduled expansion. ☐ Site-level partners play a significant role in identifying and leveraging local revenue sources, including in-kind contributions from partner agencies. ☐ Grant money is sought and used strategically to leverage additional resources.
Alignment and Integration	☐ RFPs, grant opportunities, and other potential funding requests developed by school districts, United Ways, local government, and others are aligned with the initiative's results framework. ☐ School improvement plans provide for the coordination of school district resources to achieve agreed-upon results.
Supportive Policy	☐ A statement of support for community-wide results and the expansion of community schools is included in the strategic plans of major partners (school board/district, city, county, United Way, community foundation, other funders). ☐ The school district has set forth administrative guidelines enabling the effective operation of community schools. ☐ Partners amend policies within their own organizations to support scale-up.
Professional Development and Technical Assistance	☐ Intermediary staff coordinate technical assistance to help the initiative implement and sustain its expansion plan. ☐ Technical assistance and professional development respond to needs identified by participants. ☐ Staff ensure that participants and technical assistance providers jointly design, implement, and evaluate training. ☐ Two-way communication with state and federal officials is ongoing.
Broad Community Engagement	☐ A strategy for finding new champions has been designed and implemented. ☐ An increasing number of people are active advocates for community schools. ☐ Communication with the public occurs regularly as planned. ☐ Community issues that affect schools (e.g., safety, housing, immigration policy) are tracked, evaluated for their impact on the initiative's work, communicated to the initiative, and considered for community-wide action.

Notes:

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Stage 5: Implement Systemically

Shared Ownership	Spread	**Depth**	Sustainability

Milestones	Some Things to Think About
Align Principles, Practice, and Policies	☐ Encourage local sites to adapt the initiative's desired results ☐ Build effective site-level management ☐ Ensure alignment between the initiative and school sites ☐ Set the stage for success
Initiate Professional Development and Technical Assistance	☐ Use professional development and technical assistance resources earlier rather than later ☐ Co-construct professional development and technical assistance ☐ Build helping networks within and across school sites ☐ Schedule early to become part of the school's core mission

Pitfalls

❖ Not creating a mechanism that enables school-site teams to communicate policy challenges that influence their ability to achieve the results they seek.
❖ Cutting corners on the quality and quantity of coordinators in an effort to establish new community schools more quickly.
❖ Overlooking the need to embed community school principles and practices in school systems' and community partners' professional development programs; failing to provide professional development opportunities for community schools coordinators.
❖ Developing one-size-fits-all professional development and training for sites without their input.

Notes:

From *Scaling Up School and Community Partnerships: The Community Schools Strategy*
www.communityschools.org/scalingup

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How You Know You're Making Progress

Stage 5: Implement Systemically	
Collaborative Leadership	☐ Leadership development opportunities for parents/family members and residents enable them to carry out their leadership tasks.
Results-Based Vision	☐ Planning and implementation at every school site are aligned with the community-wide vision. ☐ To organize its work, every site develops a results and indicators framework based on the community wide framework. ☐ Priority is given to specific results based on site needs, with indicators used to track progress.
Data and Evaluation	☐ Based on results and indicator frameworks, site teams make decisions about which data are most relevant and useful to collect. ☐ Policy barriers based on confidentiality and other requirements are communicated to community-wide leaders for action (Stage 6).
Finance and Resource Development	☐ Reliable funding streams are coordinated and sustain priority programs and services at community schools.
Alignment and Integration	☐ Partners enact policies and provide resources to ensure that sites targeted by the initiative's rollout strategy work together to achieve results. ☐ Technical assistance aligns policies and integrates practices across sites in order to build functioning networks of community schools. ☐ Regular review of MOUs and results and indicator frameworks ensures that the staffing and delivery of all partners' activities at each site are integrated with school plans and the priority results of community schools. ☐ Sites connected by the initiative's rollout strategy collaborate with each other in planning, implementing, and evaluating activities. ☐ Site partners, within and across linked sites, participate in developing the school improvement plan that reflects each site's results framework. ☐ Sites integrate the activities of other community reform initiatives aimed at achieving similar results. ☐ The school and its partners integrate academic and non-academic supports, services, and opportunities to attain agreed-upon results. ☐ Instructional content and methods, during and after school hours, reflect community school principles in support of selected indicators.
Supportive Policy	☐ The district has set forth administrative guidelines enabling the effective operation of community schools. ☐ Partners, including the school board, enact specific policies to support and sustain community schools. ☐ Partners act to change policies within their own organizations to support scale-up. ☐ School board and/or district policy allows community partners to use school facilities at no charge to implement activities aligned with site-level results. ☐ A clear and coherent set of practices and policies with respect to site-level implementation guides both school staff and community partners and fosters integration between in-school and after-school activities. ☐ Personnel policies of school sites, lead agencies, and partner agencies are aligned and reviewed regularly to foster positive working relationships across shared staff.

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How You Know You're Making Progress

	Stage 5: Implement Systemically
Professional Development and Technical Assistance	☐ The principles and practices of community schools are incorporated into higher education and district-run educator preparation professional development for principals, teachers, paraprofessionals, counselors, nurses, and others. ☐ The principles and practices of community schools are incorporated into professional development for partner staff. ☐ Joint, ongoing professional development for school and partner staff is available; policies encourage and enable participation. ☐ Technical assistance helps sites develop a results and evaluation framework. ☐ Staff organize pre-service training for community school coordinators and facilitate their continued training in appropriate, district-led professional development. ☐ Technical assistance and professional development respond to needs identified by participants. ☐ Staff ensure that participants and technical assistance providers jointly design, implement, and evaluate training. ☐ School staff and site-level partners participate in joint professional development and planning time designed to deepen integration between in-school and after-school teaching and learning. ☐ Community school coordinators receive pre-service training from the initiative, and site- level partners participate in relevant school-run professional development activities. ☐ Technical assistance facilitates the work of school-site teams. ☐ Participants and technical assistance providers jointly design, implement, and evaluate training.
Broad Community Engagement	☐ The community school promotes itself as the hub of the neighborhood and uses the name and logo of the initiative to build its own identity. ☐ Expansion sites host visits for elected officials, partners, family members, neighborhood residents, and representatives of other schools to showcase accomplishments, recruit champions, and develop peer networks. ☐ Community issues that affect schools (e.g., safety, housing, immigration policy) are tracked, evaluated for their impact on the initiative's work, and considered for local action. ☐ Parents and residents represent the concerns of community schools and their neighborhoods in decision-making forums at all levels (e.g., neighborhood associations, housing commissions, city council, and school board).

Notes:

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Stage 6: Continue Improvement & Expansion

Shared Ownership	Spread	Depth	Sustainability

Milestones	Some Things to Think About
Collect Data to Assess Progress	☐ Prepare staff for data collection ☐ Collect data
Use Data to Strengthen the Initiative	☐ Translate data into usable information ☐ Plan action steps ☐ Use communication mechanisms
Publicize Progress	☐ Call attention to positive trends ☐ Develop a coordinated campaign ☐ Communicate effectively
Expand Rollout	☐ Keep at it
Preparation and Professional Development	☐ Create professional development for community leaders ☐ Target appropriate preparation and professional development to educators, other school staff, and community partners
System Scan	☐ Assess progress across four characteristics of effective scale-up: shared ownership, spread, depth, and sustainability

Pitfalls

❖ Relying on inaccurate or incomplete data
❖ Failing to organize data into issues that are prioritized and addressed
❖ Underusing the site management team as a source of information and insight into community conditions and school-site operation
❖ Delaying the release of information on progress until "hard data" on test scores are available
❖ Overlooking positive trends and the cumulative impact of small improvements
❖ Neglecting routine scans of system functional areas to indicate where work needs to be strengthened

Notes:

How You Know You're Making Progress

	Stage 6: Continue Improvement & Expansion
Collaborative Leadership	
Results-Based Vision	
Data and Evaluation	☐ Relevant data on participation, operation, and outcomes inform policy and practice decisions to improve site-level implementation and expansion activities. ☐ Staff deliver technical assistance to sites to design and implement effective data collection. ☐ Staff analyze and package data for various audiences. ☐ Sites regularly collect, analyze, and use relevant information on participation, implementation, and results to make continuous improvement in practice and recommendations for policy change.
Finance and Resource Development	
Alignment and Integration	☐ The district uses data collected by the initiative to improve the school system's strategic plan. ☐ Partners regularly scan the initiative's operation across all functional areas to identify strengths, weaknesses, opportunities, and overall effectiveness in scale-up. ☐ The school district uses data collected by the initiative to improve the school system's strategic plan. ☐ Staff assist partners and site leaders in conducting regular system scans at their respective levels and monitor performance across networks of community schools. ☐ Sites regularly scan initiative operation across all functional areas as well as external environment to identify strengths, weaknesses, and opportunities.
Supportive Policy	☐ Partners solicit and are responsive to resource and policy requests based on site data and practice knowledge. ☐ Partners change policies within their own organizations to support scale-up. ☐ A clear and coherent set of practices and policies with respect to site-level implementation guides both school staff and community partners, fostering integration between in-school and after-school activities. ☐ Sites package data-based findings into appropriate recommendations for changes in policy, resources, and/or training and professional development. ☐ Sites communicate policy, resource, and professional development needs to community-wide leadership based on data collection; they regularly scan across all functional areas.
Professional Development and Technical Assistance	
Broad Community Engagement	☐ Published data on the performance of each community school and on system-wide expansion are easily accessible to the public and policymaker.

Notes:

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