



Institute for Democratic Education in America

## The Vision, Strategy, Learning, and Potential Impact of IDEA

**Real change requires frequent evaluation and evolution**

updated November 2010

At 13, Viviana was kicked out of school for being a discipline problem. She was opinionated, curious, and wanted to think critically.

However, at her new school, Nuestra Escuela, these are the very skills that helped her excel as a powerful leader. Her involvement in the school and the larger community put her on the path to the university and future leadership roles.

Viviana is one of the lucky ones. Despite having been labeled a troublemaker, she found a place that saw all she had to offer and could offer her in return the challenge and support she needed. Her fate could easily have been different.

Many of us know students just like Viviana. We know that the context and ways we engage with students matter. Viviana wants to know what happens to students who don't find a place that sees them clearly. You may wonder, too.

# Executive Summary

Education is a key area for social transformation. And while it is clear to most of us that our education “house” needs major remodeling, there is good news. Americans can create the conditions where youth are meaningfully involved in their learning and prepared to participate in a democratic, multiracial, and sustainable society.

In fact, we already are meeting this challenge. It’s just that most folks don’t know about it, because our current remodeling efforts aren’t very inclusive, coordinated, or strategic. It’s as if everyone has decided that the house needs some work, but then began our own projects without talking with one another.

And that is where IDEA can help. By building a powerful network around a vital message and focusing energy on what is working, IDEA can help transform the remodeling process.

IDEA starts by helping youth, parents, educators, community leaders, researchers, and decision-makers get into conversation about what matters most. Then, we help people make more informed decisions by showcasing the schools, teachers, and community projects that deserve our attention. Finally, we share the resources, consulting, and research needed to support a useful remodeling process, while staying connected to the real lives and needs of youth and families across the country.

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# 1. What's the big IDEA?

The big IDEA is that it's time we are accountable to our youth, our planet, and our communities.

It is time we reawaken our creativity and commit to providing a quality education that is aligned with our highest values and deepest community needs in ways that are accessible to every young person and their family.

Our world is in a constant state of evolution, and there is a significant gap between the values, skills, and learning we think our youth and communities will need in the next 20 years and the daily experiences that most of our students, families, and teachers have.

Many parents and students have come to the conclusion that nothing big can change. With that assumption, they work to maximize what they need: just to survive, or to get access to the university, job, or pay they want.

The media doesn't help. Most stories about education focus on funding, test scores, or local human interest stories. There is little substantial conversation about the largest questions:

**What are the educational experiences our youth need to thrive?**

**How or do our values and practices need to change?**

**If lots of folks think real change is needed, what keeps something significant from happening?**

The Institute for Democratic Education in America (IDEA) is committed to asking these questions and building the network, capacity, and movement needed to ensure that youth are meaningfully involved in their learning and have the tools to create the just, sustainable, and democratic societies needed in this century.

This document shares IDEA's vision, values, strategy, and potential impact. We want to know what you find compelling and what needs work. This is a moment in time that is both challenging and full of possibility. We can transform our educational practices if we collaborate and share our best insights with one another. So please, be critical and teach us.

**We've got important work to do together.**

## 2. So what is democratic education, and why is it important?

First the disclaimer: It may not be sexy or savvy to say it out loud, but democratic education is a living concept that isn't easy to define and it shouldn't be. Democratic education is about linking learning to concepts of deep democracy and community. Since our communities aren't static, and neither is our understanding of what kinds of learning best serves a healthy democracy, neither can the definition.

IDEA currently defines democratic education as **real-life learning rooted in community and meaningful to each individual. It cultivates personal and social responsibility and resiliency within thriving ecosystems.**

In brief, democratic education is "learning that matters."

If we expect our youth to become adults who exercise reflective judgment, responsibility for themselves and their community, and who take part in shaping their country and its policies, then the environment in which they are schooled must teach them how to do that—it must give them practice in real responsibility and real authority.

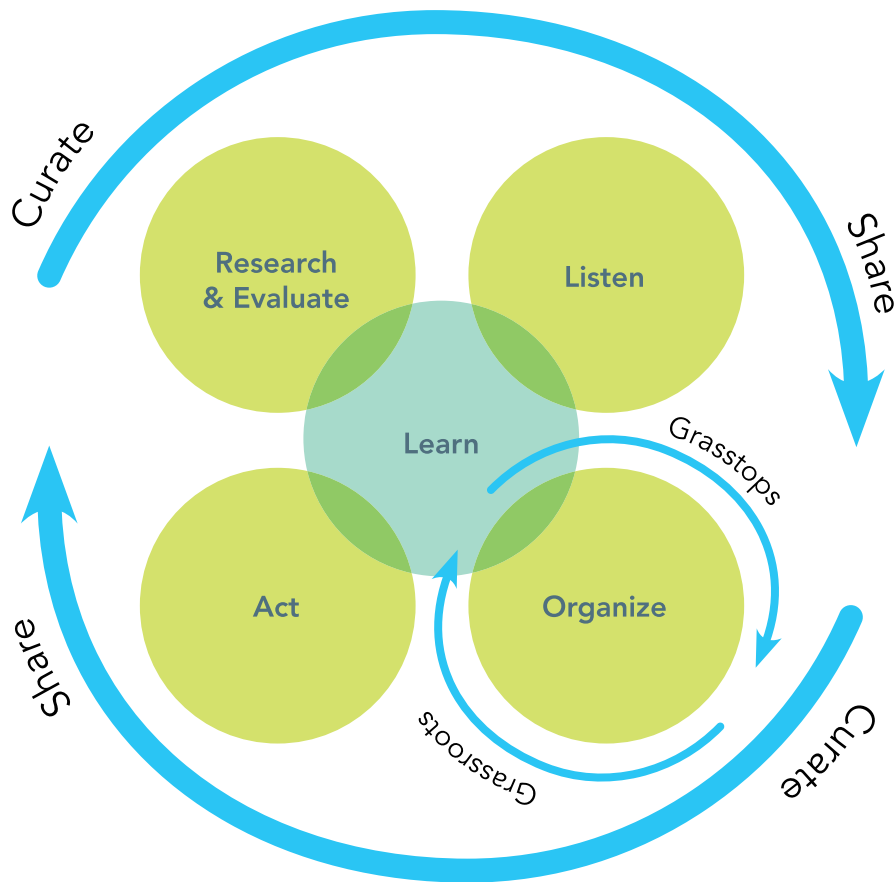
Most students in school are treated as if they have no judgment at all, except around trivial, adult-constructed matters, and are given very little responsibility, except to "achieve." Then, we expect them to transform into fully-functioning members of a participatory democracy at the moment they turn 18. That's an inherent conflict, a problem that we can name.

Democratic education utilizes practices like advisories, mentoring, apprenticeships, restorative justice, self-managed learning, and shared governance. These practices give young people a voice in their own learning, support their broad development including social, personal, and intellectual growth, and connect youth to their local community and the surrounding environment.

**"When I am asked what is democratic education, one of the things I say is, the access for all to quality education that liberates soul and mind and helps form self-sustainable human beings and communities."**

**—Justo Mendez,  
Founder, Nuestra Escuela**

### 3. IDEA's Theory of Change



**Learn, Listen, Act, Organize, Research and Evaluate:** The four center circles are interconnected and at the center of IDEA's efforts. Often referred to as "praxis," this interaction seeks to show how the organization synthesizes the valuable information that comes from each area of focus.

**Double Movement:** Moving from both the grassroots and the grasstops, this signals our efforts to organize at both micro and macro levels. Efforts that organize nationally or top-down have often failed due to the lack of connection between local leaders and those directly seeking change. At the same time, local grassroots efforts can often be stymied for their lack of connection to decision-makers and coalition building. Organizations that are pitted against one another simply repeat lessons that others have already learned. The most power is gained by organizing simultaneously at both levels.

**Curate and Share:** As IDEA interacts with schools, researchers, youth, and others, we aim to consistently share back what we are learning and curate, much like a museum, the best resources, tools, and practices for others to utilize.

## 4. IDEA's Core Strategy: How we think we can get things moving

**1. Frame the Message:** IDEA frames the national dialogue about education with a focus on democratic values and social justice. Our approach is fun, credible, inclusive, and interactive. We build a significant online presence using social networking, viral videos, and blogs to support offline collaboration and action. We identify new, diverse, and important voices to engage with mainstream media and other key targets.

**2. Build a Network:** IDEA brings youth, parents, educators, and policy-makers together. We help spur the connections between democratic educators, place-based educators, youth organizing, and those doing social justice work. IDEA is making new connections and building a stronger network every day.

**3. Share the Best Resources:** IDEA curates resources on democratic education and makes them accessible to the general public. We post the latest news about democratic education on our Facebook page and website. IDEA will soon provide a searchable resource database for materials related to democratic education that will include:

- Action kits that provide how-to guides to making change in your school and community
- Classroom lesson plans for meaningful student involvement
- Research, writing, and multimedia resources (articles, videos, etc.) on democratic education
- A showcase of schools, programs, and organizations around the world that best model democratic education such as Nuestra Escuela ([www.nuestraescuela.org](http://www.nuestraescuela.org)) and EdVisions ([www.edvisions.org](http://www.edvisions.org))

**4. Listen and Organize:** IDEA identifies talented youth and community leaders and supports their efforts for positive change in education at local, regional, and national levels. We recognize the significant gap that exists in communication between youth, parents, educators, activists, and policy makers. With poor communication also comes little coherent action. Community organizing is a time tested model that our network can utilize, along with digital organizing, to generate a powerful catalytic effect in the lives of folks who are directly experiencing challenges and want change.

**5. Consult and Train for Transformative Change:** Drawing on its diverse international network of education and business professionals, IDEA advises schools and organizations on how to build on what's already working and expand it. We also give workshops and talks around the country.

**6. Generate Original Research and Policy:** IDEA will facilitate research and publish innovative educational material. IDEA will ask rigorous questions and seek answers about what educational practices foster healthy lives and communities.

## 5. IDEA's Analysis of the Current Landscape: Why we think IDEA is necessary and viable

**To the best of our knowledge, there isn't another organization currently doing what IDEA has begun and aims to do.**

### **The evidence:**

Leaders of the U.S. Social Forum, who brought almost 20,000 people to Detroit, had to search for organizations to lead an assembly focused on education.

Long-time education reformers, researchers, and new contacts have repeatedly made statements like:

"Organization X just hasn't gotten it. They are focused on policy reform but they don't have anyone to stand behind them."

"So many organizations have been focused on test scores, funding, or teacher effectiveness."

"We have needed an organization like IDEA for a long-time."

**IDEA does not need to convince people of something totally new or that something needs to happen. There is already a lot happening. IDEA can help connect the dots and support a collaborative, strategic, and powerful network.**

### **The evidence:**

Education People's Movement Assembly at the U.S. Social Forum turned out 400 people from over 40 organizations and all 50 states.

"The number of democratic education projects and schools that have been starting in the US has increased dramatically in the last six years," according to Isaac Graves, Conference Coordinator of the Alternative Education Resource Organization (AERO).

Civil rights groups issued a joint statement in July 2010 calling for investment in local communities and challenging the funding formulas and over-focus on standardization currently embodied by NCLB (ESEA).

Sir Ken Robinson's TED Talk on "How Schools Kill Creativity" in June 2006 is one of the top ten most watched TED talks of all time, with over 1.5 million views on YouTube alone.

Campaigns led by youth to create a National Student Bill of Rights and to ensure Quality Education as a Constitutional Right have begun in the last two years.

Teachers for Social Justice and Rethinking Schools report record numbers of teachers attending regional conferences including 1500 in San Francisco and 750 in Portland, OR.

Authors like Seth Godin, Dan Pink, and the Heath Brothers have strong mainstream audiences and have popularized ideas about the need for new ways of learning and working.

According to the “Ready to Innovate and Are they Really Ready to Work?” studies, employers report:

- **70%** of graduates lack problem solving skills
- **73%** lack leadership abilities
- **97%** of employers agree that creativity is of increasing importance in the workplace

The last International Democratic Education Conference (IDEC) had over 420 attendees from 38 countries.

There are currently at least 16 international cities dramatically democratizing their schools by focusing city resources more holistically while personalizing the experiences of students and teachers.

There are multiple research fields with significant potential to impact what we think about teaching and learning:

- Self Determination Theory and Research
- Motivational Interviewing
- Strength-based short term therapeutic intervention
- Neuroscience
- College Student Affairs Research on Adult Learning, Retention, and Mattering
- Gross National Happiness Study
- The Hope Study
- Participatory Action Based Research
- Research on community asset mapping and building
- Research on impact of Place-based Education Efforts
- Research on Inclusion
- Positive Psychology
- Human Motivation and Learning
- Multiple Intelligences (i.e. Howard Gardner)
- Social and Emotional Intelligence (i.e. Daniel Goleman)
- Systems Thinking (i.e. Peter Senge)

## We believe that IDEA's opportunities exist out of its potential to bridge and synthesize these core concepts and skills:

- Young people are powerful, creative, and can be meaningfully involved in their learning.
- Core literacy in reading, writing and math are essential gateways to realizing power and potential.
- "Think global, act local" is as relevant a strategy to education as food and environmental sustainability.
- Research and assessment are not to be shunned. They are powerful allies in moving the conversation away from high-stakes standardized tests towards something more relevant and humane.
- Social media and other digital tools allow even old ideas to be conveyed in new and powerful ways.
- Conversations about quality are essential and too often have been put aside by advocates for alternatives out of a spirit of inclusivity or fear of becoming too obsessed with outcomes. There is a real need to reclaim the word and the power of genuine and meaningful accountability.
- Strategy and systems thinking are not only valuable, but essential.
- No one gets to have it all figured out. Research continues to show us how little we know. We need learning organizations that are flexible, innovative, humble, and that possess a sense of humor.
- Expertise in supporting democratic learning spaces is rare.
- Plumbers, electricians, and other trades-people have important roles as teachers and builders within our communities.
- Collaboration across difference, focused on shared principles and successful practices, makes change possible.

## Stories

### John Newton

**John Newton is a retired New York Public School teacher. He spent 30 years teaching in Western New York. He has a Doctorate in Education. He is not radical. He has served the teaching profession and his students long and hard. Yet, now retired, he can't help thinking about how little all of those years of service accomplished. He wonders often about what could be done to get back to the ideals, goals, and practices of living in a real democracy. He knows his students weren't getting what they really needed, and that he was hampered in teaching what he thought mattered most.**

John is one of thousands of teachers who are tired of platitudes and glossy new programs. He wants meaningful change that works for his students, their families, and their community.

## **IDEA can be a sustainable organization that generates revenue in alignment and in service of its mission.**

Here are a few of the revenue-generating projects in the pipeline:

Two-day Education Tours that showcase the best projects and schools in a city or region. We estimate the price point for two-day trips including housing, food, and transportation at just under \$300 per person. In three years, IDEA can support 10 regional tours happening at least 4 times per year with 30 people per tour.

**Revenue potential in 3 years = \$240,000**

Workshops and training providing relevant professional teacher development, youth leadership training, and support for democratization projects featuring IDEA consultants, staff, and other leaders are already being requested.

**Revenue potential in 3 years = \$100,000**

Non-government funded transformative change work with schools, youth-focused projects, and cities.

**Revenue potential in 3 years = \$360,000**

## **IDEA has strong potential to attract additional contributed revenue from private foundation funding:**

IDEA has identified 44 private foundations whose prior giving, interests, and mission seem to align well with IDEA priorities and activities. Average giving to new organizations estimated at \$58,000.00.

**Revenue potential in 3 years = \$232,000 to \$1,276,000**

## **IDEA has strong potential to establish a high-donor leadership circle:**

IDEA has recognized the need and potential impact of a strategic leadership circle that brings investment and wisdom from the business, philanthropic, and education sectors.

**Revenue potential in 3 years = \$200,000 to \$400,000**

## **IDEA has strong potential to receive state and federal government funding and contracts:**

IDEA has identified the potential to successfully compete, with the support of key partners, for the next round of federal i3 (Invest in Innovation) grants, as well as for state funds to support a deeper level of engagement and long-term systems change.

**Revenue potential in 3 years = \$1,500,000 to \$6,000,000**

## 6. IDEA's Milestones: What indicators will help us know IDEA is making a real impact

### If what we are doing matters, in 2011 (one year from now):

IDEA will be able to chart network growth based on this continuum of engagement:

- Initial points of contact: Unique visitors on website, social networks, phone contacts, 1:1 meetings, and at events totals over 50,000.
- Fans and followers: Facebook fans, Twitter followers, number of people signed up for e-updates, and folks who want to "keep in touch" totals over 5,000.
- Active participants/members: Number of people downloading or uploading resources, number of people considered active by regional and digital organizers in monthly and annual reports totals 2,000.
- Leaders: Number of regional leaders, bloggers, board, committee or task force members, interns, and committed volunteers totals 200.
- At least four high-profile individuals and at least 10 significantly well-known individuals publicly endorse IDEA.
- At least 20 individuals, at least one in each of IDEA's 11 organizing regions, will host IDEA Launch Parties to introduce the organization to their networks and discuss attendees' interest in participating in a popular movement for democratic education.
- At least 100 educators around the country will lead their classes in an activity designed by IDEA to celebrate our launch and become familiar with democratic education.
- At least 20 media outlets around the country will cover IDEA, and at least 10 online publications.

### If what we are doing matters, in 2013 (three years from now):

- Educational Tours will be established in ten US cities or regions, average 20 participants per tour, and four tours per year reaching over 800 people.
- 20 major media outlets cover the release of IDEA's annual concept paper on the state of education.
- IDEA's online social media presence is over 25,000 people.
- IDEA has helped at least 10 schools or programs incorporate more democratic practices with measurable effectiveness.
- The field sustains the IDEA monetarily. If we are getting work and earning income by living out our mission and strategy something is going right.
- Active volunteers total over 1,000.
- At least one major US university or research institution has begun a major study in conjunction with IDEA.

- IDEA has relationships with 10 universities, such that education classes at those universities include classes on democratic practice in schools and alternative methods of classroom management and emergent interest-based curriculum usage.
- Journalists and policy-makers seek out IDEA for credible comment and analysis.
- Positive mentions of democratic education or the concepts within it have increased in US major media outlets by 10% since IDEA's inception.
- IDEA has 5 nationally recognized champions who generate media coverage and spur political and policy reform.

### **If what we are doing matters, in 2015 (five years from now):**

- At least one elected official or school superintendent has embraced democratic education and facilitated robust democratization work in their community.
- Democratic education policy proposals are in the legislative process in at least 20 states and there have been five legislative victories.
- IDEA has 10 nationally recognized champions who generate media coverage and spur political and policy reform.
- Unique visitors to IDEA's website over a one-year period will exceed 500,000 people.
- IDEA will be invited to speak at national level forums on education, such as the National Reading Council.
- Working with other partners, IDEA has modeled how to effectively replace high stakes standardized testing in schools with relevant, rigorous, community based assessments.
- No more than 10% of public schools have zero tolerance policies.
- IDEA has successfully assisted youth to create a National Student Bill of Rights and/or ensured that youth have a right to a quality education.

## **Stories**

### **Tanya Reza**

**Tanya Reza did it all “right.” She went to a competitive public school and strove for the highest grades, got great tests scores, and got admitted to MIT. But as an undergraduate at MIT and later as a graduate student at Columbia, she found herself suffocating. She was surrounded by the “best” but she felt confused and disconnected. Yeah, she could “play the game” and spit out information, but she had lost her curiosity . . . and she was frightened by her own lack of interest. What had happened? Who was she? She had “learned” so much, but none of it seemed to matter, much of it she couldn’t recall, and most importantly she was deeply unhappy.**

Tanya is one of thousands of young people who played by all the rules and succeeded by standardized measures of success, but who ended up feeling empty. She had no idea that the road she took would lead her to reevaluate everything she thought she knew about teaching and learning. She knows that our country can and must do better to educate our young people.

## 7. Key Insights: What IDEA has been learning:

In IDEA's first three months of public activity, we've spoken at length with hundreds of youth, educators, non-profit leaders, funders, policy-makers, parents, and more. Here are the biggest take-aways so far:

**Lesson #1: Democratic education's best advocate might be the planet.** While the initial analysis for IDEA mentioned climate change and its impacts, it was nowhere in the organization's initial vision or mission. There is tremendous activity going on amongst educators and organizations seeking to link up social justice, environmental justice, and educational reform (indeed the term "education justice" has recently emerged on the national scene). There is something that happens in conversations when concern for the planet becomes the focus. As a conservative farmer from Idaho said to IDEA Executive Director Scott Nine on a plane, "When I think about how rapidly things are changing, I can't really say much of what I learned in school would actually be useful to my grandkids."

**Lesson #2: People are ready to get involved.** 91% of folks whom we surveyed want to get involved in change efforts in their local communities but they don't know how to start, don't know others to collaborate with, and don't think they have the time. If IDEA can make the first steps clear, people are ready to go, but they want and need some support.

**Lesson #3: We can help connect the dots in education and build a collaborative and strategic change movement.** As education consultant, author, and activist Kirsten Olson recently commented, "The education sector is as disconnected and balkanized as they come. There is such tremendous need for creating a map that people can locate themselves inside of but also helps draw the connections between all the different organizations and projects that are out there." We can't say it any better. If we've learned anything in the last year that is valid, reliable, and testable, this is it.

**Lesson #4: Change doesn't have to be complicated.** In the People's Movement Assembly at the U.S. Social Forum, we watched people who strongly support public schools and teachers unions talking with people who love charter schools, private schools, and alternative schools. We saw three, maybe even four, generations talking openly, listening generously, and thinking seriously. We saw people of different races, classes, educational levels, expertise, political ideologies, faiths, and hometowns identify lots of common ground and clear points of disagreement. With clear intentions, good design, and the right frames of reference, we can facilitate these kinds of conversations and parlay them into action.

**Lesson #5: We can keep it real and dream big.** We don't have to choose between practical down and dirty hard work and thinking about what is most important. Now, more than ever, we need to dream big. We just can't stay in dream state. Our dreams only have value if we take the risk of sharing them and seek to apply them in action.

## 8. IDEA's Values: What we believe in

- We've come to think that the values we bring to the work are more important than our mission and vision because they inform them. Sharing our values and assumptions allows us to think more clearly about our work.
- It is not enough merely to present a new framework for education. We must engage with others in conversation, and we must be humble enough to know that we don't have all the answers.
- We will not be effective without directed coordinated action . . . and a sense of humor.
- The evidence of having a good strategy will be when that strategy consistently drives the actions of every person involved with IDEA.
- We must not simply react to current educational initiatives with negativity. We must stand for something.
- Cranium Inc., the board game company, was wise to judge each decision by asking, "Is it CHIFF?" Even if CHIFF may be a wonky acronym, Clever, High-quality, Innovative, Friendly, and Fun will get it done.
- People on the front lines of a challenge will almost always have more recent and more accurate information about how to meet the needs and find the opportunities that challenge presents.
- Innovation requires experimentation and failure. Sometimes we will get it wrong. Sometimes we will get it right. Wrong or right, some people will not like what we do.
- Conflict is our best ally. Concerns are the fuel of better solutions. It takes courage to speak a problem, and maybe more to really hear one. We won't get anywhere if we can't find that kind of courage.
- When in doubt, stop planning and start doing. OK, not always. Plan for the money.
- Tell stories. They are at the heart of everything important, because they are the best way to be heard and to make sense of things.
- We cannot pretend that oppression, poverty, and hate don't exist. We can find ways to bring together people who think differently and might seem like "enemies." Those differences bring great strength.
- Every child has the right to be meaningfully involved in their learning and possess the tools to create and live in a more just, deeply democratic, and sustainable world.
- Hard skills like reading, writing, math, and science are important because in the current reality they provide our youth and their families with access to real resources and power.
- It is important for our efforts to be intergenerational. Culture can be transformed when three generations or more are present.
- We value youth understanding the history, culture, ecosystem, and stories as they connect to their local communities. Connecting to our location and being rooted to a sense of place is important.
- We cannot confuse "public" as having to equal "the government." No matter how we splice it, we need public education: education that is by the people, of the people, and for the people.
- Shrink the change. We can begin to build something together by choosing a manageable, concrete project to build on, even when it doesn't seem world-changing.
- We assume that multiple strategies are needed to accomplish our mission.
- We must highlight our best and most diverse voices for transformative educational change.
- It is essential to talk about quality and to sort out what works and what doesn't. A project with a neat website and 2 students should not be showcased at the same level as a school working with 300 students for the last 15 years.
- Be blunt. We don't have time to waste and need to practice being respectfully direct.
- Devote several hours a week to doing favors for people with no intent on being repaid. Karma is just as important with our organization as it is with our individual lives.
- Don't be afraid of emotion. It's not sappy. It's what makes people care.
- Groups are the most natural unit of work. Our intention is that every group in our organization is going to be an extraordinary one.
- There is a moral and environmental imperative that we act more strategically together. Crisis isn't helpful. Urgency is.

## 9. Core Strategy

### IDEA's Mission and Vision

IDEA's mission is to ensure that all young people can participate meaningfully in their education and gain the tools to build a just, democratic, and sustainable world.

IDEA envisions an educational system and practice in which every young person has the opportunity to live and learn in an environment of participation and collaboration, freedom and responsibility, and equality and justice. In the 21st century, our national and global societies face considerable challenges: economic crises, prejudice and ethnic violence, growing ecological devastation and climate change. We need educational philosophies and practices that offer our youth the skills, values, and tools they will need to meet these challenges.

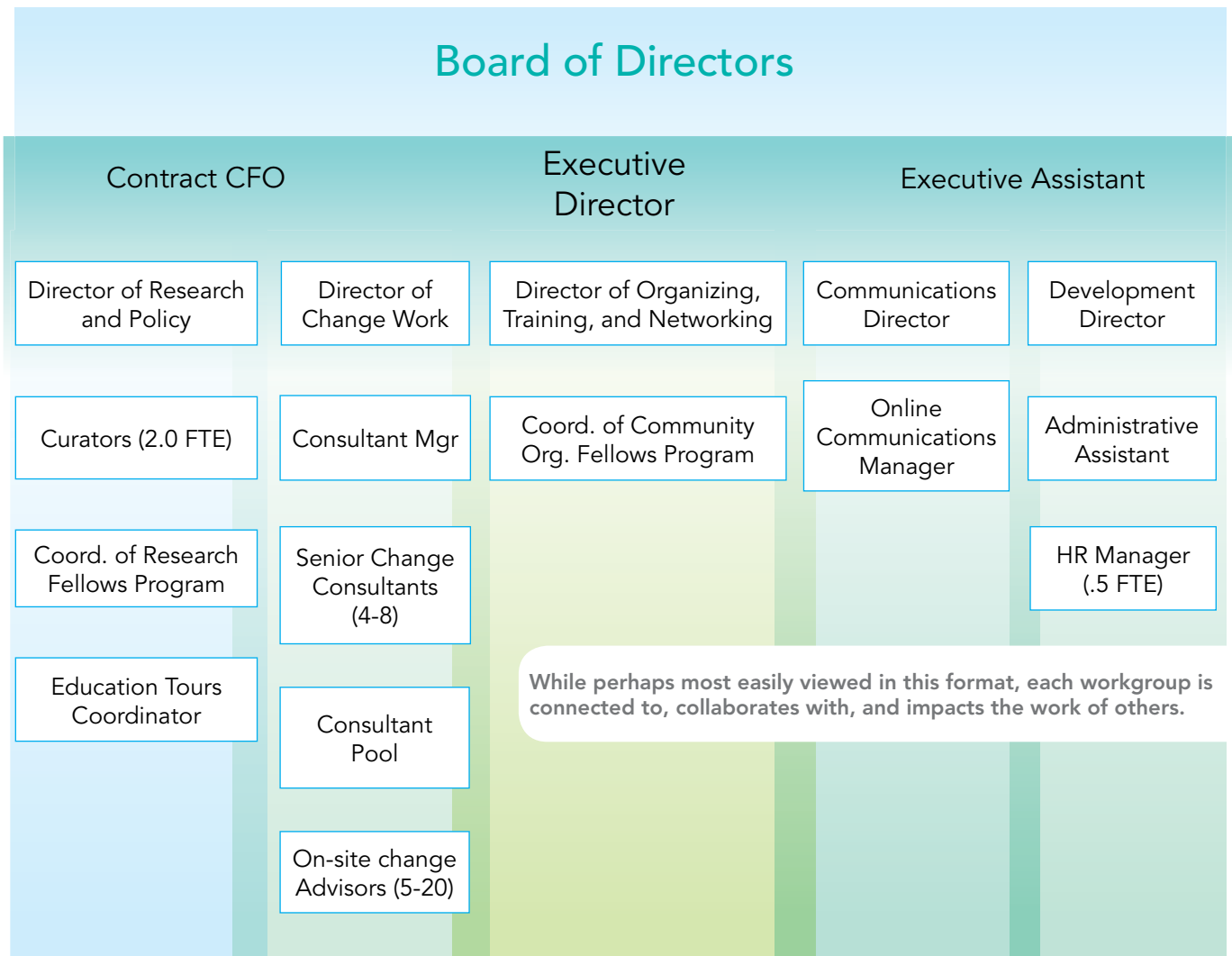
IDEA aims to be the 350.org of education: catalyzing a movement that is grounded in research, creatively organizing, and fueling real change at local and regional levels that never loses sight of its important aim or its common values. While educators, youth, and parents can't point to a single data-point to focus our work, we can begin to build a stronger, more collaborative network that gains credibility and power because we are making real change on the ground.

It would be false to say what the final impact might be. But we think the real aim of IDEA is to increase the conditions that support our best learning by our best teachers, elders, and trades-people and to eliminate the conditions that get in the way of creating vibrant democratic learning spaces that serve our planet and our communities well.

# 10. IDEA on Paper: Organizational Design

We've thought hard about what kind of organizational capacity and growth is needed over the next three years. We need to maintain a consistent pattern of success in change projects, while scaling to a size where we can effectively compete for federal grants and have meaningful impact at larger district and city levels.

If IDEA is fully resourced to live out its potential in three years, this is the staffing and resources we think it will need.



# 11. IDEA on Paper: Anticipated Budget for 2013

## Staff/personnel

Director of Research and Policy	\$65,000.00
Curators/Policy Specialists (2.0 FTE)	\$50,000.00
Coordinator of Research Fellows Program (.5 FTE)	\$20,000.00
Education Tours Coordinator	\$40,000.00
Director of Change Work	\$65,000.00
Consultant Manager	\$50,000.00
Senior Change Consultants (5 contracted at 10K each)	\$50,000.00
On-site Advisors (10 FTE)	\$500,000.00
Director of Organizing and Training	\$65,000.00
Coordinator of Community Organizing Fellows (.5 FTE)	\$20,000.00
Executive Director	\$75,000.00
Executive Assistant	\$50,000.00
Communications Director	\$65,000.00
Coordinator of Digital and New Media	\$40,000.00
Development Director	\$65,000.00
Administrative Assistant/Office Manager	\$40,000.00
HR Manager (.5 FTE)	\$25,000.00
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Total personnel	\$1,285,000.00

## Additional Expenses

Rent (space for 10; 1500 square feet at \$38/sf/yr) - could also be split between 2-3 locations, e.g. Southern, Eastern, Western offices	\$57,000.00
Office Supplies	\$12,000.00
Postage & Shipping	\$20,000.00
Printing & Publications (very rough estimate)	\$20,000.00
Marketing and Communications	\$15,000.00
Connectivity	\$6,000.00
Technology	\$8,000.00
Accounting	\$15,000.00
Insurance	\$7,000.00
Travel & Event Fees	\$80,000.00
Payroll Tax	\$308,000.00
Benefits	\$160,000.00
Fundraising Costs	\$20,000.00
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Total Additional Expenses	\$728,000.00
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TOTAL Expenses	\$2,013,000.00

## 12. Potential Barriers: What could get in the way?

### **Inertia and the overvaluing of inertia**

Attempting to remodel the public education system has been likened to turning around an aircraft carrier. It doesn't exactly spin on a dime. So, yes, the scope of the challenges are big. But equally challenging is the quickness of folks to relent. It seems almost as if a generation or two has given up on our capacity to accomplish something big and important together.

### **Lack of financial resources to meet the opportunities that exist**

In just three months of publicly presenting IDEA, it is clear that there is strong interest and need for the work we want to engage in. Can we generate the investment and funding to match?

### **Can we scale our staff quickly enough to meet opportunities while not losing quality?**

We have received great feedback on the quality of our initial team. Now we must find ways to grow our staff at a fairly rapid rate while not allowing the quality of our work to suffer.

### **Could we lose our potency?**

As an educational researcher put it to us, "The US educational system has an exceptional ability to sterilize, and co-opt even, those with great intentions. Resist the temptation to turn your head and stand for something meaningful and potent."

## 13. Potential Barriers: Proposed solutions

- Accept no/low interest loan offer for 3.3 million to be paid back over five years beginning in FY 2014.
- Seek private foundation investment
- Prepare and compete for the anticipated next round of i3 grants
- Develop Leadership Council consisting of business, philanthropic, and education leaders willing to make IDEA among their top three giving priorities while lending their insight, expertise, and connections.
- Seek Operational Effectiveness grant from the Packard Foundation with attention to securing support from the Glen Price Group.
- Seek meeting via Geoffrey Bellman with folks at the Bill & Melinda Gates Foundation to learn lessons about moving and scaling too quickly.

## 14. Resources Needed

- Mentoring and increased expertise on best ways to manage rapid growth while maintaining quality and integrity in organizational operations.
- More skilled support for robust media and PR campaigns
- National “burn” capital of \$2.6 million over three years to cover the gap between revenue and expense as we increase our capacity to fundraise and earn revenue.
- Risk capital of \$503K, so we can maintain cash flow while participating in government funding opportunities with long distribution periods.
- Opportunity capital of \$200K to allow IDEA to respond to mission-critical opportunities.

**IF living in democratic societies committed to human rights creates well-being,**

**AND IF humans learn primarily based on the people and environment that surrounds them,**

**AND IF culture is transmitted from one generation to another,**

**THEN We need to create environments where people of all ages, especially youth, are immersed in the values, practices, and beliefs of democratic societies and human rights.**

# Appendix

## A. Brief Organizational History

Dana Bennis, Chris Balme, and Melia Dicker met at the 2003 International Democratic Education Conference in Troy, New York. Late at night and between sessions, they dreamt together about building a national organization that could catalyze meaningful educational change based on democratic values and human rights.

Soon they received an invitation from Israeli educator Yaacov Hecht to learn about the work of the Institute for Democratic Education (IDE) based in the Kibbutzim College of Education in Tel Aviv. Dana and Chris were able to accept, while Melia stayed in her native California to work in public schools through the AmeriCorps Public Allies program.

Inspired by their ideas and the success they witnessed while visiting in Israel, Dana and Chris returned to the US committed to advance democratic education.

Dana and Chris both became engaged in other education projects but never let go of their initial vision to build a national organization that could catalyze meaningful educational change based on democratic values and human rights. Whereas other efforts in democratic education had focused their message internally, to a loyal group of believers, IDEA would direct its message outward, to the mainstream. Dana and Chris believed that the only way to effect widespread change was to collaborate with those who are involved in education, from students to policymakers, and in a variety of settings, including public schools.

IDEA would be an action and research based organization that would learn from the failures of previous educational change efforts, while utilizing new technologies and pragmatic leadership to develop the resources, credibility, and strategy needed to systemically change our nation's paradigms about learning and teaching.

In March 2009, The Bay and Paul Foundations funded a four-day vision and planning session that led to the creation of a first Board of Directors and a clearer strategy. Soon after, IDEA hired Dana Bennis to serve as its founding director and secured two-year funding commitments from The Bay and Paul Foundations and the New Visions Foundation for a planning year in 2009-2010 and a launch year in 2010-2011.

In February 2010, Dana and the Board of Directors recruited Scott Nine to serve as IDEA's first Executive Director. Scott joined the IDEA team in July 2010. Dana now serves as Research and Policy Director, Chris Balme is a Board member, and Melia is Communications Director.

IDEA launched publicly in May 2010.

## B. Original Mission

IDEA's initial mission was to validate and catalyze democratic educational change through credible research and analysis, advocacy, training, and community empowerment. Motivated by the disconnect between our democratic values and current educational practice, IDEA aimed to create the infrastructure and resources needed to stimulate transformative and fundamental changes in educational theory, practice, and evaluation.

## C. Highlights of operational plan for 2010-2011

### July 2010 to December 2010

**Launch, Lunch, and Listen** - Following our public launch, we will continue to implement a viral marketing strategy that engages in the ongoing use of new technology, videos, and social networking to expand to new and diverse audiences. Key targets include: visionary school superintendents, university folks doing teacher training, researchers in key areas of interest, media, key potential endorsers, key partners/organizations, and anyone who says they will meet with us and can help our efforts.

**Begin regional organizing** - In July 2010, IDEA selected our first round of regional organizers, who are now actively organizing for IDEA in communities around the country.

**Begin to feed the hungry**- IDEA will meet the need for credible resources, training, and consultation amongst practitioners, youth, parents, and administrators with a build out of our website resources page. This will include a searchable database and the launch of our first Action Kit. By November 2010, we will develop an initial contract consulting pool ready to market. By January 2011, we will have our first slate of workshop offerings and webinars ready for promotion and provision. We will add website functionality that makes it easy for schools, universities, or other projects to request consulting.

**Make some noise** – IDEA will publish its first paper on the State of Democratic Education (title TBD), the first annual review of research and reform efforts that provides both assessment and recommendations for democratic education reformers. The report will highlight potential in areas where democratic education has clear impact: reduction in dropout rate and violence, increases in student engagement, and greater teacher enthusiasm and commitment.

**Generate the relationships and resources we need** – Scott Nine will lead our development efforts. Grant proposals and letters of interest will be sent to dozens of foundations by the end of 2010, with continued outreach ongoing. By November, IDEA will have at least 1,000 donor prospects and 200 active donors with pledges and gifts for the year exceeding \$30K as a mostly silent phase of first Annual Fund Drive.

**Stay focused, disciplined, and fun** – The trap of starting something credible and exciting is trying to take on too much too fast. It will likely take IDEA ten years to fully realize its current vision. Time is of utmost importance. We must act with both the “fierce urgency of now” and the wisdom of creating change that can last. We will continue to attract staff, volunteers, and supporters if we heed this goal.

**Continue to build organizational infrastructure** – IDEA will end its use of IDE-Northwest as a fiscal sponsor, secure its own 501(c)(3) status, and recruit at least three new board members.

### January 2011 to June 2011

**Organizing works** – Organizing happens both digitally and regionally with each regional organizer connecting at least 200 people together. Local chapters are evaluated for feasibility and IDEA holds its first regional tours and trainings. In April, IDEA recruits its second round of organizers.

**The hungry can feed themselves with the right tools** - IDEA's website adds a second Action Kit, continues to deepen its offering of curated resources, and publishes and sells an Organizational Self-Study Tool in connection with building a voluntary accreditation process. Continued use of social networking and viral technology will attract and engage new contacts.

**Lay groundwork for next level of communications** – Prepare simple, very high-quality brochures that target a variety of key audiences: K-12 students, university students, parents, donors, educators, and the general public. Prepare a quarterly newsletter (email and paper formats) with a research angle and an advocacy and networking angle.

**Presenting, Training and Consulting** - If there is an audience, we are presenting to it. Contract consultants are participating in first projects. Full engagement is taking place in marketing training and consultation services to schools, businesses, universities, youth, and parent groups. Feedback from organizers and members will be used to develop our first skills-oriented training effort.

**Research foundation laid** – In the spring of 2011, IDEA will call for its first research and policy fellows. We will begin to compile research and connect with key partners on teacher effectiveness. We will begin collaboration and development of a plan to identify and address teacher training needs.

## **D. Accomplishments to date:**

- Established a dynamic website and social media presence with over 10,000 unique visitors and a network over 1,600 since launching publicly in May 2010.
- Anchored and facilitated the “Another Education is Happening: People’s Movement Assembly” (PMA) at the U.S. Social Forum in Detroit, Michigan in June 2010 with three other organizations. This PMA brought 400 people representing over 40 education organizations and many youth together for over 4 hours to affirm a core set of shared resolutions for education action and transformation.
- Created and launched an award-nominated video, [Make Your Voice Heard](#), that has been seen by over 6,000 people in at least three countries and translated into Spanish since first released in May 2010.
- Created a powerful and dynamic blogging core of important, diverse, and young voices.
- Selected as the US Ambassador for the International Education Cities Initiative led by Alex Olek and Yaacov Hecht.
- Selected IDEA’s first ten community organizing fellows in July 2010.
- Developed initial school evaluation for use by youth, teachers, and parents.
- Built core organizational infrastructure needed to operate effectively and dynamically.
- Led first change project through consulting between Nuestra Escuela in Puerto Rico and Jefferson County Open School in Boulder, Colorado.
- Invited as a partner on a proposal to the Mayor of Caguas, Puerto Rico, William Miranda, for Caguas to become an Education City – a project that would consider how to align city services, human resources, and schools. The entire city would be considered a learning space whose aim is to ensure a high quality of life for every citizen.

## E. Commitment to Internal Excellence

We aren't going to make anything extraordinary happen unless we expect extraordinary things to happen and start by being extraordinary ourselves.

### Internal Mission

IDEA is a model of the best operational practices in creating a successful, sustainable democratic organization committed to human rights and social justice.

### Internal Vision

We aren't afraid to fail or succeed. Our organizational focus is on learning, finding clear patterns of success, and creating an organizational culture that is engaging, rewarding, fun, and challenging. We won't forget that authenticity and relationship are the roots from which everything else grows.

IDEA also isn't afraid of thriving financially or earning money. We understand that we don't have to choose between realizing our mission and being financial sustainable. Indeed, the quality of our internal operations will directly impact what we can accomplish.

**There are several key outcomes that will indicate the internal success of this effort in ten years time:**

- IDEA has a diversified funding base (individual donors, foundation, government, and business support, and earned income) such that no two sources contribute more than 33% of the budget.
- IDEA maintains low overhead costs by placing a premium on flexibility and scalability of organizational design and adhering to innovative business practices. IDEA has clear organizational structures and decision making processes.
- IDEA is contacted at least 40 times a year by business and non-profit leaders for mentorship, technical support, or those seeking to learn more about our internal operations.
- IDEA continually uses a dynamic shared leadership model, where different people lead in certain areas according to their strengths.
- 90% of staff and volunteers report knowing their roles, the organizational mission and strategic direction, as well as knowing they make an important contribution.

## F. What might IDEA do in the future?

IDEA has plenty of work to fulfill the promise of its current strategy. However, for those who want more, here are the projects on the radar screen:

- Pilot a teacher training program in partnership with a major university building on the program at Seminar Kibbutzim College of Education in Tel Aviv.
- Introduce a voluntary accreditation program for schools and projects.
- Work with the International Education Cities Initiative to pilot projects in the U.S.
- Seek pass-through funding for schools and projects through challenge grants or other competitions that spur, support, and showcase great models.
- Begin advocacy consulting – help with congressional or local testifying, research analysis, lobbying, etc.
- Meet the calls for IDEA to expand its focus to “the Americas” and more extensively collaborate with efforts in Central and South America as well as Canada.
- Publish a book about what we’re seeing and learning.
- Establish local/regional chapters built out of local organizing efforts.
- Develop a Youth Consulting Corps to actively participate in IDEA consulting projects.
- Conference
- Documentary film
- Short videos
- Handbook for democratic education
- Resources for non-governmental schools to be “public” schools
- Resources for start-ups
- Speakers bureau

“The free inquiry that is promulgated in the classroom,  
a spirit of equality in the classroom,  
to me this is part of a democratic education.”

—Howard Zinn