

Summary Report on the 2006 Evaluation of the Peace and Security Initiative



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October 31, 2006

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Evaluation of the Peace and Security Initiative

Introduction

The Interaction Institute for Social Change has been honored to conduct a formative evaluation of the Peace and Security Initiative. This report contains feedback from a survey and set of semi-structured interviews IISC conducted for the I-Team of the Peace and Security Initiative between July and October 2006 – an aggregation and summary of results and as well as some suggested areas for the I-Team’s consideration. The results are based on surveys completed by approximately 16.8% of participants in the PSI to date (total number = 63 of 375) and of 21 interviews with key informants.

Purpose of Evaluation

Based on IISC’s conversations with the Evaluation subcommittee, the purpose of this formative evaluation was:

- ❖ “To assess the PSI’s progress on the strategic objectives”
- ❖ “To assess the process and whether it serves the goals and to set the method and strategy going forward”, and
- ❖ “To inform the I-Team about what the organizations involved are thinking”

The evaluation was designed to determine the extent to which PSI’s intended outcomes have been reached to date, and what parts of the process have been most useful in helping to reach those outcomes. We structured the evaluation to consider how effective the PSI is to date in relation to three measures of success: results, process and relationships.

Evaluation Process

The evaluation process followed several steps:

1. Staff from IISC (Marianne Hughes, Curtis Ogden and Linda Guinee) worked with the Evaluation Subcommittee of the I-Team to determine desired outcomes of the evaluation and to draft the survey and interview protocols.
2. We tested the survey protocol by having members of the I-Team take the survey and suggest improvements. IISC upgraded the survey based on suggested upgrades from members of the Evaluation Subcommittee.
3. We implemented the survey (Appendix A, p. 17) on Survey Monkey, sending it everyone (375 people) who has participated in the PSI process to date. The survey was open from July 31 until August 20, 2006.
4. IISC staff analyzed the survey results to determine themes and areas for further inquiry through interviews.
5. IISC designed a draft interview protocol, then gathered and incorporated feedback on the protocol from members of the Evaluation Subcommittee.
6. IISC implemented the interview protocol (Appendix B, p. 23). Twenty PSI participants were selected in a stakeholder analysis by the Evaluation Subcommittee based on input from the survey results and I-Team

suggestions. Interview participants were selected to represent a broad range of stakeholder groups, including:

- a. Representation of the four identified sectors of the community (research-oriented organizations, advocacy organizations, grassroots organizations and foundations),
- b. a range from casual to active participation
- c. large and small organizations
- d. current and former members of the I-Team and former Design Team
- e. breadth of issue areas represented
- f. perceived satisfaction (and dissatisfaction) with PSI
- g. parts of other collaborations
- h. heads of organizations and heads of projects

In each category, back-up participants were identified in case participants were unavailable or uninterested in participating.

7. IISC completed 21 interviews and thorough analysis of the themes that emerged through the interviews.
8. IISC synthesized and aggregated feedback from the survey and interviews and prepared the report.

Findings

Survey

The survey asked questions covering a number of areas – general demographics (including type of organization people work for and type and length of participation in the PSI), their understanding of the purpose of the PSI, and how much their organization’s initiatives have been strengthened by participation in the PSI. We asked a series of questions about the capacity-building efforts of the PSI and about progress made on the PSI’s strategic goals and objectives. We then asked a series of questions about the impact of the PSI on collaborations and relationships, followed by a series of questions eliciting general comments. For the complete list of questions asked in the survey, see Appendix A, p. 17. The survey link was sent to all participants in the PSI (a total of 375 participants). Sixty-three people completed the survey.

Summary of Survey Findings

Almost everyone who responded to the survey described understanding the **purpose of the PSI** as a mix of determining common priorities and opportunities for joint action, improving policy impact, building individual and organizational skills and capacity, and providing resources (such as messaging guidance). Many people also described that attracting more philanthropic support to the peace and security community is one of PSI’s purposes.

Those who responded have participated in the PSI for varying lengths of time. Most have participated by attending the PSI community-wide meetings and reading the e-newsletters, with a significant number having attended trainings and PSI-convened or facilitated meetings. Less than ten percent have been on the I-Team or Design Team.

Most of the people who responded (52.5%) said **initiatives of their organization have been strengthened** somewhat by their participation in the PSI and a significant additional number (19.7%) said initiatives of their organization have been strengthened a lot by their participation in the PSI. Of those who responded, 27.9% said initiatives of their organization have not been strengthened through participation in PSI.

The **trainings** PSI has provided have made an impact on the way people work. Many people describe positive impacts on their own work from the US in the World and other messaging trainings; and the fundraising trainings have also been helpful. Trainings were cited throughout the survey results as helpful in engaging young leaders and junior staff. People have found the “New Nuclear Weapons” and “Talking about Iran” **messaging tools** very helpful, as well as the “Media and Communications Resources for the Peace & Security Community”. As well, people find the community e-newsletters very useful. Many respondents also cited the usefulness of the annual priorities resources, the community survey, and the grassroots mapping resource.

In terms of a number of the **strategic goals**, many people perceive that the PSI has contributed more to the community as a whole than it has to their particular organization.

When asked to rate the extent to which PSI has helped their organization or the community **increase its policy impact** over the past two years (on a scale of 1-5 with 1 being “not at all” and 5 being “a lot”), 19.6% rated the amount it has helped their organization 4 or 5 and 35% rated the amount it has helped the community 4 or 5. The primary ways respondents said that there has been an increase in policy impact relate to a number of factors, including PSI’s work on the Legislative Strategy Retreat; working collaboratively to build consensus and divide up tasks; helping focus messages, improving collaboration and coordination, and decreasing unnecessary overlap; knowing PSI members and being able to use them as sources of information; and working together as a community better – organizing well around specific issues within a very harsh climate.

When asked to rate the extent to which PSI has helped their organization or the community **develop effective messages and messengers** over the past two years (on a scale of 1-5 with 1 being “not at all” and 5 being “a lot”), 26% rated the amount it has helped their organization 4 or 5 and 27.4% rated the amount it has helped the community 4 or 5. This is one of the areas in which contributions to the community are in line with the ways people see contributions to their individual organizations. The primary ways respondents said that PSI has contributed to developing effective messages and messengers include: that the *US in the World* and PSI together helped structure the way we develop messages for maximum impact (including ways to reach the persuadable middle); that the trainings have helped build skills – which are then taken back to organizations and transferred; and that specific messaging resources have been especially helpful. At the same time, people noted that the messaging guidance needs to be tailored to resonate with the local needs for grassroots organizations and are specifically geared toward nuclear weapons issues.

It was also noted that there is an ongoing need for training and practice to apply messaging resources well.

When asked to rate the extent to which PSI has helped their organization or the community **reach more and more diverse audiences** over the past two years (on a scale of 1-5 with 1 being “not at all” and 5 being “a lot”), 15.6% rated the amount it has helped their organization 4 or 5 and 14% rated the amount it has helped the community 4 or 5. The primary ways respondents said that PSI has contributed to broadening the community’s reach include: bringing a wide range of participants to the table, including faith-based communities. A number of people from research and advocacy organizations mentioned the importance of having grassroots organizations at the table. Others describe reaching more diverse audiences as one of the community’s biggest challenges.

When asked to rate the extent to which PSI has helped their organization or the community **influence decision-makers** over the past two years (on a scale of 1-5 with 1 being “not at all” and 5 being “a lot”), 10% rated the amount it has helped their organization 4 or 5 and 22% rated the amount it has helped the community 4 or 5. The primary ways respondents said that PSI has contributed to influencing decision-makers include: contributions to the annual legislative strategy retreat; keeping the community unified (to the extent PSI has done so); and enabling a more coherent message to come from the community. At the same time, there is recognition of the difficulty of influencing decision-makers in the current climate.

When asked to rate the extent to which PSI has helped their organization or the community **improve its approach to collaborative efforts** over the past two years (on a scale of 1-5 with 1 being “not at all” and 5 being “a lot”), 27.4% rated the amount it has helped their organization 4 or 5 and 37.3% rated the amount it has helped the community 4 or 5. The primary ways respondents said that PSI has contributed to improving approaches to collaborative efforts include: meeting together to discuss views on topics of concern and reaching consensus statements (even when individual organizations retain different views of the situation); thinking strategically about combining unlikely partners to achieve a strategic goal; getting “outside-the-beltway” groups in touch with those from DC; improving the legislative strategy retreat; helping people meet and stay in touch (including then working collaboratively on other projects); and putting funders and spenders on the same side of the table. Deepti was recognized here as a significant player in helping the community work more collaboratively. At the same time, a number of people here and throughout the survey noted that they felt the PSI perspective is more related to the DC perspective than to that of grassroots organizations, and could relate more to those working in the field.

When asked to rate the extent to which PSI has helped their organization or the community **cultivate future talent** over the past two years (on a scale of 1-5 with 1 being “not at all” and 5 being “a lot”), 10.2% rated the amount it has helped their organization 4 or 5 and 14% rated the amount it has helped the community 4 or 5. The primary ways respondents said that PSI has contributed to cultivating future talent include: including younger members of the community alongside more senior members, giving capacity trainings and opportunities for young people (including

Deepti) to take leadership. There was an acknowledgement that PSI at least tries to do something about this issue (including creating the Next Generation of Talent Resources), but that there hasn't been a significant impact yet in this area.

When asked to rate the extent to which PSI has helped their organization or the community **improve its financial health** over the past two years (on a scale of 1-5 with 1 being "not at all" and 5 being "a lot"), 8% rated the amount it has helped their organization 4 or 5 and 7.9% rated the amount it has helped the community 4 or 5. At an organizational level, most organizations have not seen an impact on their financial health related to participation in the PSI (with a small number of exceptions in which there has been a substantial improvement directly related to participation in the PSI). At the community level, most respondents (54.9%) said they don't know whether the community's financial health has improved. Many responded that there remains a significant resource shortage in the community, especially in the grassroots sector. Those who said PSI has helped improve their financial health said it has done so through providing very useful trainings; breaking down the barriers between funders and NGOs by having funders involved in community discussions; and providing good leads and information on potential funding sources.

We asked a number of questions specifically about the impact of PSI on collaborations and relationships. Most people describe feeling very included (46.8%) or somewhat included (44.7%) in the **process PSI has used to gather input and set direction**. As well, most people feel that the process used has been somewhat or very successful in bringing forth the best thinking of the community (44.7% saying it has been somewhat effective and 27.7% saying very effective).

One of the more significant findings in the survey relates to how PSI has changed **relationships in the community**. The vast majority (91.7%) of those who took the survey said that they **know more people** in the peace and security community through participation in the PSI. There has also been a significant **increase in collaboration** among those who took the survey (48.9% said they are collaborating more with other organizations or individuals since participating in the PSI).

When asked about **relationships between NGOs and funders**, 36.2% said participation in PSI has made the relationships better. (Almost half of the respondents said they didn't know whether relationships between NGOs and funders had changed.) When asked to explain how the relationships had changed, people mentioned the importance of getting people face-to-face in non-proposal settings and the importance of integrating funding officers into the discussions and definitions of substantive priorities. They also described better transparency and communication (with room for additional improvement). That said, many of those responding from grassroots organizations described the relationships being between funders and inside-DC people and organizations and the lack of improved relationships between funders and local grassroots organizations. 19.1% of the people responding to the survey said that there has been an increase in transparency between NGOs and funders (though again, the vast majority of people

responding said they didn't know whether there has been an increase in transparency).

When asked whether PSI has changed the **relationships among NGOs**, the vast majority said that they have either improved the relationships (50%) or that they didn't know (45.6%). Changes were attributed to getting to know one another better, knowing who they can work with, broadening their perspective and lessening the tension somewhat between advocacy and grassroots groups. Again, people reported that getting to know each other and know what each other does have resulted in collaborations that would not have happened without participation in the PSI.

When asked whether participation in PSI has changed the **relationships among funders**, the vast majority (77.1%) said they don't know or that participation had made the relationships better (14.6%). Some noted that the PSI in addition to other factors since the late 1990s has improved relationships among funders, primarily related to getting to know each other better. There was also a concern raised that PSI may have helped funders narrow the agenda, as well as a concern that a more unified position has dried up funds for grassroots groups working on broader issues.

We finished by asking a number of questions requesting general comments – what PSI should continue to do and should do less of, and any recommendations people may have. People described a number of things which they felt have been of benefit to the community, including defining community priorities and collaborative projects, providing messaging resources and trainings, providing additional opportunities for those working on an issue to get together for discussion and planning, and expanding participants' awareness of each other's work. Areas people suggested in which improvements could be made include the following:

- Broadening the community and priorities – beyond nuclear disarmament to broader concerns
- Determine some proactive priorities, strategies for addressing problems that happen in the here and now
- Bring in more grassroots groups and local and regional operations
- Increase efforts to bring in additional resources – including helping grassroots groups get more foundation support
- Follow up the priority setting with strategy sessions which determine which organizations will do which pieces – and which include media and messaging strategy planning. Track progress on community priorities.
- More time for unstructured conversations among participants

Finally, there were many comments praising Deepti Choubey's work and personal contributions to the community. There was also a strong voice suggesting that bringing people together for the kinds of conversations that have been happening in the PSI (perhaps broadening to include additional concerns) are very important for participants. Relationships have been built and strengthened, resulting in greater collaboration and a greater sense of community.

Differences in Survey Results between Sectors of the Community

A few persistent differences were noted when looking at the results from different sectors of the community.

Overall, those who participated in the survey from research-oriented organizations and grantmaking foundations reported that participation in the PSI has strengthened initiatives of their organizations somewhat less than those from other sectors – though they reported that participation had helped “somewhat”. They reported more conservative impacts of the PSI in helping their organization and the community in a number of different areas (policy impact, reaching diverse audiences, influence with decision-makers, and improving financial health). Those from research-oriented organizations frequently mentioned getting to know people from grassroots organizations as one of the benefits of participation in PSI.

Those who participated in the survey from state and local grassroots organizations described perceiving that PSI perspectives more closely match those of DC-based organizations than a field perspective, in terms of issues chosen and priorities set. They were also much more likely to describe the initiative as a “funder-driven” initiative than others completing the survey. Many from state and local grassroots organizations described serious funding shortfalls and a perception that their work was not as valued by funders. Lack of progress in this area (and in some cases, decreases in their funding in the last few years) may contribute to a level of distrust in the PSI process and a concern that the initiative may be working to narrow the agenda in a way that excludes grassroots perspectives and strategies. On the other hand, a number of those from state and local grassroots organizations reported feeling included in the process, and perceived improved relationships among NGOs through participation in the PSI (especially between grassroots organizations and advocacy organizations). Everyone who has participated from state and local grassroots organizations said that they know more people in the peace and security community through their participation.

Interviews

The Evaluation Subcommittee of the I-Team selected 20 PSI participants to be interviewed based on looking for a balance in the following criteria:

- Sector of the community represented
- Casual and active participation
- Big and small organizations
- Current and former members of I-Team and former Design Team
- Breadth of issue areas represented
- Perceived satisfaction (and dissatisfaction) with PSI
- Parts of other collaborations
- Heads of organizations and heads of projects

The subcommittee was not looking for equal numbers in all of these categories, but for a representative group. Subcommittee members brainstormed names for each part of the matrix – as well as taking suggestions from people who participated in the survey. They created a final list of 20 PSI participants to be interviewed, with

prioritized backup names for each sector in the event that the suggested people were unavailable or uninterested in participating. They gave the final list to the Interaction Institute for Social Change to conduct the interviews.

Twenty-one interviews were completed¹. Interview participants were selected in the following numbers (in parentheses) from the following sectors:

- Research organizations (5)
- Advocacy organizations (5)
- Grassroots organizations (7)
- Funders (4)

The interview participants represent a broad sweep of the participants involved in PSI. A few were involved from the beginning and have remained deeply involved. A few were involved in the early planning stages and have been less involved of late. Many have participated through attending the semi-annual meetings and legislative strategy retreats and have not taken on leadership roles. A few have been very peripherally involved and responded based primarily on perceptions. Interview participants also represented a broad range of satisfaction with the PSI.

Based on gaps we identified in the information collected in the surveys – areas in which the survey results left unanswered questions – IISC, in partnership with the Evaluation Subcommittee, developed a 17-question interview protocol (see Appendix B, p. 23). Participants were sent the list of interview questions before their interview in case they were interested in reviewing them ahead of time.

We completed 21 interviews and transcribed and analyzed themes.

Summary of Interview Findings

Overall, we found those we interviewed 21 willing participants in the evaluation process. Of the 20 suggested, four participants were unable to participate and were replaced with names on the backup list and we added one interview to the original number proposed².

We asked participants to give a **“headline version” of how they think the PSI is doing**. Most participants described PSI as being somewhere on the continuum from doing extremely well to moderately well – highlighting the contributions PSI has made toward building a network of those working on peace and security issues by convening players across the different sectors of the community, bringing together grantors and grantees, helping to structure the setting of community priorities, and helping the community develop effective messages.

Having heard in the surveys that the PSI has brought value, we wanted to ascertain the perceived difference between the value it has brought to individuals, to organizations and to the community. The first of these questions was about the

¹ One person we contacted to participate who did not respond called after we had scheduled a back-up participant. We went ahead and interviewed this person as well, even though we had completed the 20 interviews, since the person was very interested in providing feedback.

² See above.

value participants perceive PSI has brought to individuals, if any. Overall, most participants described both the structured and informal networking opportunities as being of value (though a few of those working inside Washington found this less helpful than others) – saying that meeting people face-to-face makes it easier to work together outside of the meetings. A number of people mentioned that assistance with messaging and information sharing has been of value to them. Those from research-oriented organizations find value in connecting with people from grassroots and advocacy organizations in order to share their research and analysis.

We then wanted to ascertain **what value participants perceive PSI has brought to organizations, if any.** Overall, participants describe a wide variety of contributions PSI has brought to their organizations, including becoming better known, being part of setting community priorities, taking on the convening role that would otherwise fall to individual organizations, developing relationships with funders (which in some cases have led to receiving funding), developing partnerships with other PSI participants, attending useful skill-building trainings, developing messaging resources that are useful to organizations, exposure to the US in the World tools, providing the sense that we're all part of a larger community, and mapping the landscape of organizations and foundations in the community.

Finally, we were interested in determining **what value people perceive PSI has brought to the community, if any.** Participants responded that PSI's main contributions have been in convening the disparate parts of the community, helping participants to network and build relationships, learning about what each other does and hearing other perspectives (and in some cases setting direction to complement each others work), providing skill-building trainings, establishing annual community priorities, developing messaging resources, and building relationships between funders and grantees. A few participants noted having expectations that PSI would bring more financial resources into the community, which they said has not happened.

Through the survey responses, we knew that there was a perception that the PSI has contributed toward the community's policy wins over the past two years. We wanted to learn more specific information about what **policy wins the PSI has contributed toward and how those contributions were made.**

Overwhelmingly, participants in the interviews mentioned contributions PSI made toward winning on the bunker buster – citing that energy was created within the community and between grassroots and advocacy groups by setting this as a priority for the community. Some described an increase in the number of groups working on the bunker buster after the community established this as a priority. Others mentioned frustration that the policy wins have been very limited – acknowledging the political climate in which the community is working, while also discussing the limitations of the approach to setting priorities.

We wanted to gather more in-depth information on participants' **perceptions of the ways PSI may have assisted with effectively developing and delivering messages to key audiences.** As this was one of the contributions reported in the

survey, we wanted to gather more detailed information. Overall, most participants mentioned the positive impact of the US in the World materials, as well as PSI and US in the World capacity-building trainings on media and messaging in beginning to translate analysis to a broader public. Others mentioned Deepti's capabilities in messaging and the development of messaging resources as especially helpful. Many people expressed a need for assistance in the form of media consultation for small organizations, funding to pay for coordinated media campaigns, as well as emphasis on the creation of coordinated media strategies to support some of the chosen priority campaigns. Some interview participants also mentioned noticing that the community's messages are more polished than they used to be.

We asked participants to reflect on the **contributions PSI may have made toward engaging and mobilizing new and more diverse sectors of the public**. Overall, many participants described this as an area still needing attention. We found a diversity of ideas about what is meant by "new and more diverse sectors of the public." Many participants mentioned progress engaging faith-based communities and Congressional staffers. Others noted engagement in PSI itself continues to bring in new organizations. Some described the strength of bringing research-oriented organizations, advocacy organizations, grassroots organizations and foundations together in the same conversation. Some mentioned wishing alliances could be established with groups like MoveOn.org and the Center for American Progress. A number of participants described wanting to increase the engagement of communities of color, young people and retired military in PSI. Others discussed the "narrow" span of topics PSI addresses as limiting engagement.

We then wanted to **see whether participation in the PSI has had an influence on funding priorities (for people we interviewed who work in foundations) or programming decisions and priorities (for those from other sectors)**. Overall, participants responded in a number of ways. While most organizations said that the priorities of their organizations influence the PSI priorities rather than the other way around, some described being influenced to engage with the PSI priority issues when they fit within the mission of their organizations, as PSI priorities, if well coordinated, have a higher chance of success. Others described beginning to coordinate with other organizations – realizing, for instance, that if there are other organizations covering a specific aspect, it's less important for them to do the same. There has been very limited influence on the funding priorities of foundations, though participation has deepened program officers' understanding of the community and its sectors, and in some limited cases, had an impact on funding decisions.

The survey results strongly indicated that **relationships in the community have been strengthened through participation in the PSI**. We wanted to ascertain whether the interview participants agreed with this finding – and to what they attribute the change, if any – as well as their views about how that may help the community. Most participants described the importance of meeting others both during structured exercises and unstructured networking time as well as on different work teams as critical to strengthening relationships. Many participants described the importance of mixing sectors of the community they would not normally meet. Meeting people face-to-face and learning about what each other

works on was described as greatly increasing the probability that people would pick up the phone or email someone they met. For some, meeting others and knowing that they are not in this work alone was very significant. Said one participant, “creating or maintaining stronger relationships is what PSI has actually ended up doing best.”

Based on the survey results, we were interested in finding out whether participants are aware of **anything unique in the way PSI meetings and communications happen**. Overall, participants found mixing sectors of the community as unique – especially mixing funders and grantees and bringing people in from out of Washington, DC. Some describe the monthly e-newsletter, which brings forward information from across the community, as unique and helpful. For some, the heavy volunteer effort is unique and a source of concern – the potential Achilles heel of the effort. Many describe the structured way of getting input on community priorities as a new contribution. Others describe the well-designed meetings, good speakers and interesting topics as a major contribution which, while not completely unique, is high quality. Others described the uniqueness of starting every meeting with skill-building workshops as unique.

We gathered more detailed information about the **contributions PSI has made to date**. Overall, most participants described convening the community and building a network, as well as the subsequent creation of a community which sees itself as a whole and improving the connections between individuals as PSI’s most significant contributions. Other noted contributions include the push toward prioritization, the assistance with messaging and the skill-building trainings. Said one participant, “Getting over the hump of such a disaggregated grouping and creating the mechanism for potentially having more strategic work is an accomplishment.” Many participants describe the importance of bringing together a very disparate community in a sustained way and building its ability to think strategically together as a significant contribution.

We also wanted to discover **disappointments participants have had and areas in which PSI has not met participants’ hopes or expectations**. Some described being disappointed that PSI has maintained a focus primarily on issues related to nuclear weapons rather than on broader peace and security issues. Others described being disappointed that PSI has not yet helped the community have a more significant media presence than it has. Many described disappointment that there doesn’t yet seem to be progress on bringing additional financial resources into the community. Those in the grassroots community describe needing additional financial resources to cover their expenses, and disappointment that the grassroots perspective does not seem to be respected or supported, as well as a lack of any campaigns that are easily brought to the field.

We then asked participants to provide **specific recommendations to improve the PSI**. There are many individual responses (see below). Themes include recommendations to continue doing the things PSI does well, redesigning the priority-setting process to broaden the issues that may be selected, and establishing ways to ensure progress is made on the identified priority areas. A few participants

mentioned the importance of examining both the limited staffing and heavy reliance on (and lack of appreciation for) volunteers to run the effort.

The evaluation subcommittee was interested in getting **participants' feedback about when they feel the PSI will have completed its' mission.**

Overwhelmingly, the response was that the PSI provides enormous value in its convening and priority-setting functions and that most people do not see an end for the importance of this role. This question also raised, for a number of participants, questions about transparency – both questions about the mission of PSI, as well as about the budget, funding of PSI.

Finally, we wanted to give people an opportunity to provide **any input they felt was important that we may not have asked about.**

Overall, the following themes emerged from the interviews:

- Those we interviewed overwhelmingly place an **extremely high value on PSI convenings and as well as on the relationships built through the convenings.** Many of those interviewed report that the contacts they have made through the PSI community meetings and working sessions have turned into collaborative partners in other aspects of their work. This was especially true for those outside of DC.
- Most of those we interviewed place a **high value on the process of mixing funders with grantees** in the meetings.
- Those interviewed from the **grassroots** sector appreciate the efforts that have been made to include them. However, a number describe feeling **somewhat marginalized**, describe **severe funding shortfalls** and feel PSI has **not had much impact on shifting their relationships with research-oriented organizations or with funders.**
- A number of the people we interviewed were concerned that **broader (non-nuclear) peace and security issues are not being prioritized.** A significant number of those we interviewed had concerns about the **process used for priority-setting** and the extent to which the chosen priorities represent the people in the room more than the priority areas on which the community could engage and have an impact. Many of those interviewed (including some whose organizations are primarily focused on nuclear weapons) find that because those who are asked are primarily from organizations focusing on issues related to nuclear weapons, the **priorities have been too narrow.** A number of people also suggested that PSI **priorities could be more proactive.**
- Many interview participants described finding that the **PSI practice of setting priorities has supported collaborative action in the community.** Most do not feel that the community priorities have influenced their organization's priorities – many feel that their organization's priorities have influenced community priorities. That said there were quite a few organizations who said that the community priority-setting strengthens their resolve to focus on specific issues (e.g., the bunker buster) because they realized that there was potential for a "win". As such, a number of people described a **"bandwagon effect" related to the setting of community priorities.**

- Those interviewed across the board have an **exceptionally high regard for Deepti Choubey and her work.**
- Many describe **significant contributions to their organization’s and the community’s work from PSI’s messaging trainings and the US in the World materials.** There were also suggestions about the **need to develop joint media resources,** and a suggestion that **creating strategic media plans for at least a few of the community priorities** (with organizations agreeing to take responsibility for specific pieces of the plan) would have a huge impact on the potential for having an impact on the priorities.
- Overwhelmingly, those we interviewed find **value in the PSI and want it to continue.** Most people described the value being related to meeting and developing relationships with others, with whom they later stay in touch, share information and collaborate. In addition, many mentioned the importance of setting community priorities while allowing individual organizations to maintain their own priorities and diverse strategies.
- There were a number of **questions about the mission and role of PSI** – as well as questions about its **budget.** People consistently downplayed their expectations for the PSI, noting that it is a very new initiative, has only one staff person and that the kinds of changes it is working toward take years.
- A number of people remarked that it was **remarkable that PSI has continued and keep getting good turnout** – contrasting it with other initiatives which quickly fizzled out. This is a sign, they felt, that many in the community find it of value.
- For this community, getting together regularly, meeting new people, and meeting with funders in the room is unique. The meetings always being held in DC make them more accessible for staff people in DC orgs to attend. They also make it more difficult for anyone other than the head of local and state grassroots organizations to attend.
- A number of those we interviewed described **concerns about lack of participation by the “Think Tanks”.** They noted that many of the leaders in the field were involved in the first year, but have not been participating since that first year.

Areas for Potential I-Team Consideration

A number of areas for potential consideration of the I-Team have been identified through the evaluation process. Areas for potential consideration include the following:

- **Continue PSI's Convening Function** – overwhelmingly, those who have participated in PSI community meetings find value in meeting each other, capacity-building skills training and priority setting. There were strong recommendations to continue with this function.
- **Priority-setting process** – many people mentioned a desire to improve the process so as to further broaden the issues set as priorities for the community (e.g., to include non-nuclear issues). As well, some mentioned that PSI is missing opportunities to address more current and upcoming issues by selecting priorities which represent a primarily reactive focus.
- **Follow-up** – many people mentioned that the priority-setting process could be strengthened by creating methods to determine concrete action plans for each of the priorities and to track and encourage progress on action items.
- **Strategic Media Planning** – a number of people suggested that strategic media planning related to priority areas would make a very significant contribution to the community. They suggested that those organizations with media capability be convened to create a detailed plan for one or two of the community priorities – inviting other organizations to join if they were interested and able to contribute.
- **Media Resources** – the evaluation results support efforts to develop media resources for small organizations that do not have media capability.
- **Research-Oriented Organizations** – there was concern that research-oriented organizations are less involved in PSI, which may result in relationships between the research-oriented organizations and others not being strengthened through the process.
- **Grassroots** – many from grassroots organizations continue to feel somewhat marginalized. They find the priority areas chosen and approaches used do not necessarily translate well to their efforts in local areas, are difficult to organize around and focus on international issues rather than local issues. In addition, they have serious concerns about funding shortfalls in the grassroots sector of the community.
- **Funding** – the process of working to bring additional funding into the community and to streamline the funding process has not yet addressed the serious funding shortfalls in the community. Continued work in this area will be of great benefit
- **Staffing and Structure** – a number of people expressed concerns about what they described as the “Achilles Heel” of PSI – the fact that it relies on a single staff person and on what is perceived as very significant volunteer contributions by members of the I-Team and others. It may be worth an examination of the sustainability of this approach, while balancing the financial needs of the community.
- **Transparency** – a few people asked for greater transparency related to who's selected for the I-Team and how people are selected, the budget for PSI, its mission, and whether and for how long PSI will continue.

Appendix A: Survey Questions

1. I work for an organization which could best be described as (check all that apply):
 - a. A state or local grassroots membership-based organization
 - b. A national grassroots membership-based organization
 - c. An advocacy organization
 - d. A research-oriented organization
 - e. A grantmaking foundation
 - f. An operating foundation
 - g. I'm unaffiliated with an organization
 - h. Other (please specify)
2. I have been involved in PSI:
 - a. Since January 2003 or before (in the development of the strategic plan)
 - b. Since January 2004 (in the implementation of the strategic plan)
 - c. Since January 2005
 - d. Since January 2006
 - e. From time to time
 - f. I have not been involved in PSI
3. I have participated (please check all that apply):
 - a. In PSI community-wide meetings
 - b. In a PSI-convened or facilitated meeting about a specific topic
 - c. In the peace and security legislative strategy retreat held in January 2005 or January 2006
 - d. In PSI trainings
 - e. In a working group
 - f. On the Design Team or the I-Team
 - g. By using resources or analysis produced by the PSI
 - h. By reading the e-newsletters and other materials sent via email
 - i. Other (please specify)

Purpose of the Peace and Security Initiative (PSI)

4. What is your understanding of the purpose of the PSI (please check all that apply):
 - a. Convening members of the community to determine common priorities and opportunities for collaborative action
 - b. Improving the policy impact of the broader peace and security community
 - c. Building the skills and capacity of individuals and organizations in the peace and security community
 - d. Providing resources (such as messaging guidance)
 - e. Attracting more philanthropic support to the peace and security community
 - f. Other (please specify):
5. Over the last two years, how much have initiatives your organization has undertaken been strengthened by participation in the PSI?

- a. A lot
- b. Somewhat
- c. Not at all
- d. If initiatives of your organization have been helped, please provide examples:

Capacity Building

6. Which, if any, of the following trainings have you attended at the PSI community-wide meetings (check all that apply):
 - a. Communications Training based on the US in the World Communications Guide (July 2004)
 - b. Communications Training – Spokespeople training (November 2004)
 - c. Communications Training – Making Your Message Work (June 2005)
 - d. Communications Training – Getting Heard on the Hill (December 2005)
 - e. Communications Training: Making the News: The Role of Media Plans, Rapid Response Strategies and Editorial Board Meetings (July 2006)
 - f. Fundraising Training: Planned Giving (July 2004)
 - g. Fundraising Training: Major Donor Campaigns and the Art of the “Ask” (November 2004)
 - h. Fundraising Training: Major Donor Campaigns and the Art of the “Ask” (November 2004)
 - i. Fundraising Training: Raising Money and Growing your Online Constituency (June 2005)
 - j. Fundraising Training: Integrating Fundraising Strategies (December 2005)
 - k. Using the Internet to Improve Activism and Fundraising (July 2004)
 - l. Winning through Alliances: The Art of Working with Others (July 2006)
7. If you’ve attended trainings, have you changed the way you work within your organization based on what you learned?
 - a. Yes
 - b. Somewhat
 - c. No
8. If so, please provide examples:
9. How useful have you found the following documents the PSI produced to improve your organization’s messaging (for each, mark “not useful,” “somewhat useful,” “very useful,” or “I don’t know”)
 - a. New Nuclear Weapons Messaging Resource
 - b. Linking Katrina and Security Communications Guidance
 - c. Weapons in Space Messaging Resource
 - d. Talking about Iran: A Communications Tool for the Peace and Security Community
10. How useful have you found the following documents to the community or to you in your work (for each, mark “not useful,” “somewhat useful,” “very useful,” or “I don’t know”)
 - a. Peace and Security Community Survey
 - b. 2006 Peace and Security Priorities for Collaborative Action

- c. 2005 Peace and Security Priorities for Collaborative Action
- d. Grassroots Mapping Resource
- e. Next Generation of Talent Survey
- f. Next Generation of Talent Resources
- g. Media and Communications Resources for the Peace and Security Community
- h. Community e-newsletters

Strategic Goals and Objectives

11. The PSI aimed to assist the peace and security community with efforts to “develop and refine the ideas, solutions and policies that further disarmament, cooperative security and the rule of international law.” On a scale of 1-5, with 1 being not at all and 5 being a lot, to what extent has the PSI helped YOUR ORGANIZATION increase its policy impact over the past two years?
12. On a scale of 1-5, with 1 being not at all and 5 being a lot, to what extent has the PSI helped THE COMMUNITY increase its policy impact over the past two years?
13. If the PSI has helped your organization or the community increase policy impact, please provide examples.
14. The PSI also aimed to help the peace and security community “develop the message and means to effectively promote these ideas and policies.” On a scale of 1-5, with 1 being not at all and 5 being a lot, to what extent has the PSI helped YOUR ORGANIZATION develop effective messages and messengers over the past two years?
15. On a scale of 1-5, with 1 being not at all and 5 being a lot, to what extent has the PSI helped THE COMMUNITY develop effective messages and messengers over the past two years?
16. If the PSI has helped your organization or the community develop effective messages and messengers, please provide some examples
17. The PSI also wanted to assist the peace and security community with efforts to “engage and mobilize diverse sectors of the public.” On a scale of 1-5, with 1 being not at all and 5 being a lot, to what extent has the PSI helped YOUR ORGANIZATION reach more and more diverse audiences over the past two years?
18. On a scale of 1-5, with 1 being not at all and 5 being a lot, to what extent has the PSI helped THE COMMUNITY reach more and more diverse audiences over the past two years?
19. If the PSI has helped your organization or the community reach more and more diverse audiences, please provide examples.
20. The PSI aimed to help the peace and security community “influence US government officials and policy”. On a scale of 1-5, with 1 being not at all and 5 being a lot, to what extent has the PSI helped YOUR ORGANIZATION influence decision-makers over the past two years?
21. On a scale of 1-5, with 1 being not at all and 5 being a lot, to what extent has the PSI helped THE COMMUNITY influence decision-makers over the past two years?
22. If the PSI has helped your organization or the community increase influence with decision-makers, please provide examples.

23. The PSI also aimed to help “build effective and diverse organizational capacity and strengthen the collaborative community infrastructure.” On a scale of 1-5, with 1 being not at all and 5 being a lot, to what extent has the PSI helped YOUR ORGANIZATION improve its approach to collaborative efforts over the past two years?
24. On a scale of 1-5, with 1 being not at all and 5 being a lot, to what extent has the PSI helped THE COMMUNITY improve its approach to collaborative efforts over the past two years?
25. If the PSI has helped your organization or the community improve its approach to collaborative efforts over the past two years, please provide examples.
26. The PSI wanted to help the peace and security community to “support a new generation of leaders, activists and experts.” On a scale of 1-5, with 1 being not at all and 5 being a lot, to what extent has the PSI helped YOUR ORGANIZATION cultivate future talent over the past two years?
27. On a scale of 1-5, with 1 being not at all and 5 being a lot, to what extent has the PSI helped THE COMMUNITY cultivate future talent over the past two years?
28. If the PSI has helped your organization or the community cultivate future talent, please provide examples.
29. The PSI also wanted to help the community to “increase and sustain funding for the Peace and Security Community.” On a scale of 1-5, with 1 being not at all and 5 being a lot, to what extent has the PSI helped YOUR ORGANIZATION improve its financial health over the past two years?
30. On a scale of 1-5, with 1 being not at all and 5 being a lot, to what extent has the PSI helped THE COMMUNITY improve its financial health over the past two years?
31. If the PSI has helped your organization or the community improve its financial health, please provide some examples.

Collaborations and Relationships

32. . The PSI has worked to include individuals and organizations in a variety of ways – through community-wide meetings and working groups, cross-sector strategy meetings addressing priority issues, conference calls, community surveys and disseminating resources and information. Have you felt included in the process PSI has used to gather input and set direction for the Peace and Security Community?
 - a. I've felt very included
 - b. I've felt somewhat included
 - c. I have not felt included
33. How effective has this process of consultation and consensus-building been in bringing forth the best thinking of the community?
 - a. Not effective
 - b. Somewhat effective
 - c. Very effective
 - d. I don't know
34. How has PSI changed the relationship between NGOs and funders?
 - a. PSI has made the relationships better
 - b. There has been no change

- c. PSI has made the relationships between NGOs and funders worse
 - d. I don't know
 - e. Please explain:
35. Has transparency between NGOs and funders changed because of the PSI?
- a. There is more transparency
 - b. There is the same amount of transparency
 - c. There is less transparency
 - d. I don't know
36. How has PSI changed the relationships between NGOs?
- a. PSI has made the relationships better
 - b. There has been no change
 - c. PSI has made the relationships worse
 - d. I don't know
 - e. Please explain
37. How has PSI changed the relationships between funders?
- a. PSI has made the relationships better
 - b. There has been no change
 - c. PSI has made the relationships worse
 - d. I don't know
 - e. Please explain
38. Are you collaborating more with other organizations or individuals since participating in the PSI?
- a. Yes
 - b. No
 - c. No change
39. If you are collaborating more, with who are you collaborating (please list names of organizations or individuals)?
40. If you are collaborating more, do you think these collaborations would have happened without the PSI?
- a. Yes
 - b. No
 - c. I don't know
41. If you think back to when you first attended the PSI, because of your participation in the PSI, do you now:
- a. Know the SAME number of people in the peace and security community
 - b. Know MORE people in the peace and security community
42. Of the new people you now know through PSI activities, if any, which of the following kinds of organizations do they represent (check all that apply):
- a. A state or local grassroots membership-based organization
 - b. A national grassroots membership-based organization
 - c. An advocacy organization
 - d. A research-oriented organization
 - e. A grantmaking foundation
 - f. An operating foundation
 - g. Unaffiliated with an organization
 - h. Other (please specify)

Comments

43. What, if anything, do you think PSI should do more of in the future?
44. What, if anything, do you think PSI should do less of in the future?
45. We're interested in finding out who you think are leaders in the Peace and Security Community for a few reasons (e.g., to identify who to contact for more in-depth interviews to deepen our evaluation of the PSI). Please list individuals you feel would be important to interview based on their insight and experiences.
46. Please provide additional comments about the PSI you'd like to share to help us maintain things that are working and make improvements.

Appendix B: Interview Questions

1. What is your role in your organization and how long have you been there?
2. For how long and in what ways have you been involved in the PSI?
3. Overall, based on your understanding/expectations about PSI's role, what's a headline about how do you think the PSI is doing?
4. What value, if any, has the PSI brought to you as an individual?
5. What value, if any, has the PSI brought to your organization?
6. What value, if any, has the PSI brought to the peace and security community?
7. What specific contributions toward policy wins has PSI assisted the community with, if any?
 - a. What specifically did the PSI do to make this contribution?
 - b. Would these contributions have been possible without the PSI?
 - c. Is there anything you think the PSI should have been doing that would have helped?
8. How has PSI assisted with your organization's or the community's abilities to effectively develop and deliver its message to key audiences?
 - a. What more could be done and how?
9. What specific contributions has PSI made toward engaging or mobilizing new and more diverse sectors of the public?
 - a. What more could be done?
10. (If a funder) How has your involvement in the PSI influenced your funding decisions and/or priorities, if at all?
 - a. (Others) How has your involvement in the PSI influenced your programming decisions and/or your organizations project's/organization's priorities, if at all?
11. The survey results indicate that relationships in the community have been strengthened through participation in the PSI. Has this been your experience? If so,
 - a. To what do you attribute the change?
 - b. How have stronger relationships contributed to the community (if at all)?
 - c. What more could be done? How can stronger ties be maintained?
12. Is there something unique about the ways in which meetings and communications happen in the PSI?
 - a. If so, what does this contribute, if anything?
13. What are the most significant contributions or accomplishments the PSI has made to date?
14. Are you disappointed in any way with the PSI to date?
15. What recommendations do you have for ways to improve the PSI?
16. At what point will the PSI have completed its mission?
17. Any final thoughts – or anything important you want to mention that we didn't cover?