Exploring Collective Impact Initiatives
Evaluation Features, Opportunities and Challenges

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Gratitude & Acknowledgement

We begin this workshop by acknowledging that we are meeting on Indigenous land. As settlers, we are grateful for the opportunity to meet and we thank all the generations of Indigenous peoples who have taken care of this land.

As settlers, this recognition of the contributions and historic importance of Indigenous peoples must be clearly and overtly connected to our collective commitment to make the promise and the challenge of Truth and Reconciliation real in our communities.

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In the Tamarack **Learning Centre** we support our learners in the **five interconnected practices** that we believe lead to impactful **community change**.

Evaluating Impact

Collective Impact

Community Innovation

COMMUNITY CHANGE

Community Engagement

Collaborative Leadership

REDUCING POVERTY
DEEPENING COMMUNITY
BUILDING YOUTH FUTURES

Vibrant Communities
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In **Vibrant Communities** we support **cities and local leaders** to implement large-scale change initiatives to **reduce poverty** and **deepen community**.

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Check In Conversation

In the chat box, write a word or a phase that comes to mind when you think about collective impact, data or shared measurement

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Today's Agenda

- **An Overview of the Collective Impact Framework**
- **How Data and Shared Measurement Influence the CI Framework**
- **The Opportunities and Challenges of Evaluating Collective Impact**

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Collective Impact

*"**Collective Impact** is the commitment of a group of important actors from different sectors to a common agenda for solving a specific social problem, using a structured form of collaboration."*

Kania and Kramer (2011) Collective Impact.
Stanford Social Innovation Review

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Pre-Conditions of Collective Impact

- Influential Champion(s)
- **Urgency of issue**
- Adequate Resources

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5 CONDITIONS OF COLLECTIVE IMPACT

Common Agenda

All participants have a **shared vision for change** including a common understanding of the problem and a joint approach to solving it through agreed upon actions

Diverse Voices * Responsive * Community Aspiration

Shared Measurement

Collecting data and measuring results consistently across all participants ensures efforts remain aligned and participants hold each other accountable

Exploring * Alignment * Tracking Progress * Results

Mutually Reinforcing Activities

Participant activities must be **differentiated while still being coordinated** through a mutually reinforcing plan of action

Weaving * System * Supportive * Centered

Continuous Communication

Consistent and open communication is needed across the many players to build trust, assure mutual objectives, and appreciate common motivation

Trust * Transparency * Ongoing * Engagement

Backbone Support

Creating and managing collective impact requires a dedicated staff and a specific set of skills to **serve as the backbone for the entire initiative and coordinate participating organizations and agencies**

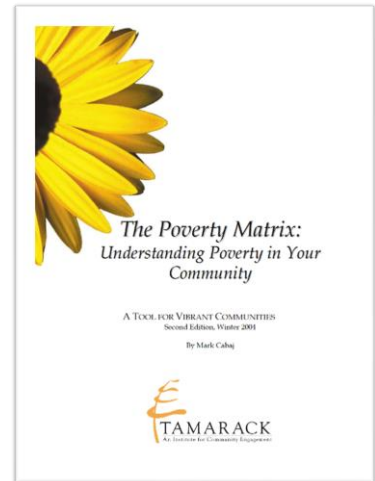**Facilitate * Convener * Coordinate * Movement**

Source: FSG

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Data: An Essential Ingredient for Collective Impact

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Data Informs the Common Agenda

- Focus on the key data points related to your issue
- Look at the trends over time – has the gap increase or decreased over the last 3 to 5 years?
- Consider the impact the data is having on programs and services – are partners aware of the data, the trends, what this means?
- Consider the community connection to the current data

The Poverty Matrix: Understanding Poverty in Your Community

A TOOL FOR VIBRANT COMMUNITIES
Second Edition, Winter 2004

By Mark Cabaj

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Community Data Sources to inform the Common Agenda

- Census Data – watch for the lag time and recency
- Annie E Casey Foundation – Kids Count Data - https://datacenter.kidscount.org/topics
- Municipal and Organizational Data Reports – how accessible are these? Who publishes, are they willing to share?
- Local Media and Social Sources
- Funding priorities of local funders
- Partner States or Communities – do they have data that is useful?
- Other sources?

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Example: Using Data to Build
your Plan on a Page

- Reviewed 70 community data sources
- Used data to define their impact statements
- Data drives forward their collective efforts

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Making the Data Come Alive:
Data Reflection Tools

- Urban Institute – Data Walks
- Tamarack Institute – Hosting a Data Walks Tool
- Forum for Youth Investment - Mapping Moving Trains
- Other Data Reflection Tools?

Data Walks can provide improvements for community members' lives

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Shared Measurement

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From Idea to Impact: Using Data to Drive Change

"My question is: Are we making an impact?"

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Shared Measurement and Evaluation

Evaluation

Shared Measurement Systems (SMS)

Evaluation refers to a range of activities that involve the planned, purposeful, and systematic collection of information about the activities, characteristics, and outcomes of a CI initiative

Shared measurement systems (SMS) use a common set of indicators to monitor an initiative's performance and track its progress toward goals

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Evaluating Collective Impact – 4 Aspects to Evaluate

1 | The initiative's **context**

For example…
- Community culture and history
- Demographic and socio-economic conditions
- Political context
- Economic factors

2 | The CI **initiative** itself

…the effectiveness of
- The five core elements of collective impact
- The initiative's capacity
- The initiative's learning culture

3 | The **systems** targeted by the initiative

…changes in:
- Individuals' behavior
- Funding flows
- Cultural norms
- Policies

4 | The initiative's **impact**

…changes in:
- Population-level outcomes
- The initiative's (or community's) capacity for problem-solving

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Source: FSG – Collective Impact Forum

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Shared Measurement asks the questions:

- What progress are we making?

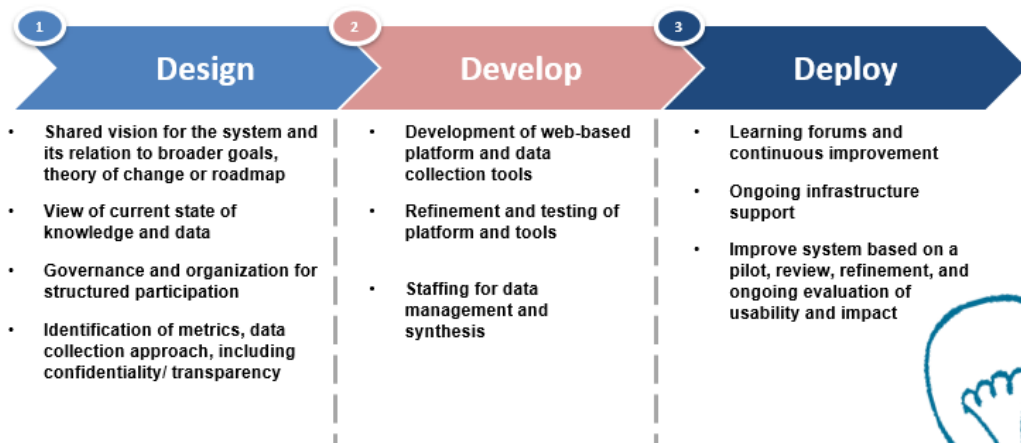- How does this information help us make better decisions?

Shared Measurement is NOT:

- Meant to measure the impact of a single organization or intervention
- Simple data collection
- Focused only (or mostly) on programmatic measures
- Meant to be punitive
- Meant to foster competition
- A once-a-year report
- A retrospective evaluation

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Phases of Developing a Shared Measurement Approach

Design (1)	Develop (2)	Deploy (3)
• Shared vision for the system and its relation to broader goals, theory of change or roadmap	• Development of web-based platform and data collection tools	• Learning forums and continuous improvement
• View of current state of knowledge and data	• Refinement and testing of platform and tools	• Ongoing infrastructure support
• Governance and organization for structured participation	• Staffing for data management and synthesis	• Improve system based on a pilot, review, refinement, and ongoing evaluation of usability and impact
• Identification of metrics, data collection approach, including confidentiality/ transparency		

Source: FSG Analysis

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Design Phase of Shared Measurement

1. Define Common Agenda

2. Set Criteria for an Evaluation and Learning Process

3. Establish an Evaluation Working Group

4. Conduct Due Diligence – leverage what is already being measured

5. Select Metrics – no more than 10-15!

6. Vet With and Engage Stakeholders

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Building Learning into Shared Measurement

1. Form Shared Measurement Learning Teams

2. Review Data Being Tracked

3. Discuss Challenges and Successes of Work

4. Identify Areas for Improvement / Testing in Work

5. Test Changes in Implementing Activities

6. Implement Changes More Broadly

7. Spread Changes Across the Initiative

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Considering Shared Measurement Indicators

- **Valid measure** linked to ultimate goal and/or sub-goals
- Easily **understandable** to local stakeholders
- Produced by **trusted source**
- **Comparable** across different groups ie. School districts
- **Affordable** to gather and report
- **Available** consistently over time, be recent, and easily disaggregated by geography
- Able to be **disaggregated** by ethnicity, gender or other relevant criteria
- **Trend data** should be provided over at least 3-year period
- Be influenced to significant degree by **local action**, and be useful in daily work of working groups

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Shared Measurement Lessons

- Start measuring from the beginning - don't let perfect be the enemy of the good
- Provide sufficient financial and logistical support for shared measurement and evaluation – it's worth it!
- Technology is secondary
- Be inclusive – the process of getting a broad set of partners to jointly identify shared measures is as important as the measures themselves
- Shared measurement alone is not sufficient – be intentional about continuous learning, and improving the system itself

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Shared Measurement Examples
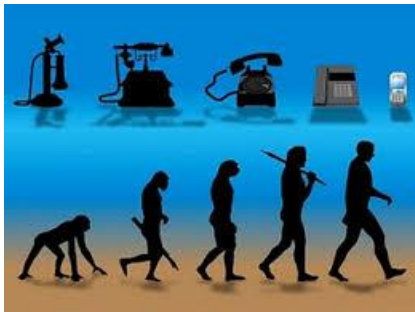
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Magnolia Place Community Initiative – Los Angeles

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Magnolia Place

What are we trying to accomplish?

How will we know if a change is an improvement?

What changes can we make that will result in improvement?

ACT | PLAN | STUDY | DO

Set SMART aims for the improvement:
- **S**pecific
- **M**easurable
- **A**ction oriented
- **R**ealistic
- **T**imely

Three levels of change:
1. System
2. Across organizations
3. Individual organizations

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Magnolia Place's Lessons

1 — Real Time Data and Learning
- Real time nature of data provides a way to test hypotheses and learn what is working/not working and why

2 — Structure for Learning
- Model for Improvement provides useful discipline; partners attend meetings to receive access to data and gain coaching support

3 — Motivation and Engagement for Change
- Tapping into partners' knowledge, expertise, and creativity

4 — Strategic Alignment
- Individual and group engagement on shared measures enables greater system functionality and alignment

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Six Simple Rules for Evaluating Collective Impact
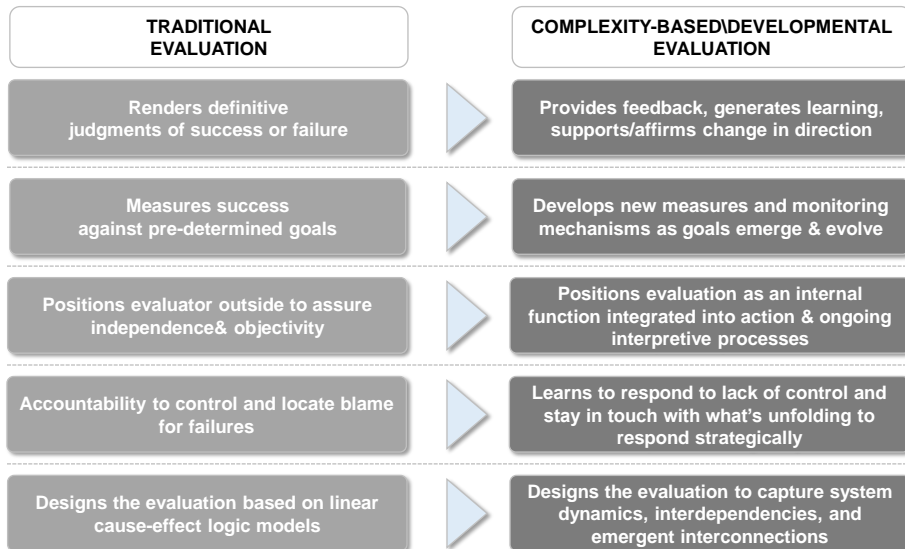
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Challenge: Evolving Strategy

- Traditional evaluation works best when people work with clear goals, well developed theories of change and fixed measures of success - and keep these stable over time.

- All Collective Impact goals and strategies often emerge over time -- and often take radical shifts.

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Comparing Two Evaluation Paradigms

TRADITIONAL EVALUATION	COMPLEXITY-BASED\DEVELOPMENTAL EVALUATION
Renders definitive judgments of success or failure	Provides feedback, generates learning, supports/affirms change in direction
Measures success against pre-determined goals	Develops new measures and monitoring mechanisms as goals emerge & evolve
Positions evaluator outside to assure independence& objectivity	Positions evaluation as an internal function integrated into action & ongoing interpretive processes
Accountability to control and locate blame for failures	Learns to respond to lack of control and stay in touch with what's unfolding to respond strategically
Designs the evaluation based on linear cause-effect logic models	Designs the evaluation to capture system dynamics, interdependencies, and emergent interconnections

Developmental Evaluation: Using Complexity Concepts to Enhance Innovation & Use. Patton. 2008.

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Challenge: Different Pieces

- Traditional evaluation tends to focus on a few, relatively simple, units of analysis.

- Most Collective Impact efforts have a large number of moving pieces and/or units of analysis.

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<u>Simple Rule #1</u>
Embrace a strategic learning approach to evaluation.

- Make informing strategy – not reporting to funders or testing policy experiments – the primary aim of evaluation activities.

- Emphasize 'real-time' feedback and robust sense-making to help social innovators make timely, data-based, decisions to develop and adapt their strategy.

- Start with a simple and 'roughly right' evaluation design and measures and be prepared to adapt them to co-evolve with the emerging strategy.

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<u>Simple Rule #2</u>
Be clear about the unit of analysis in the assessment.

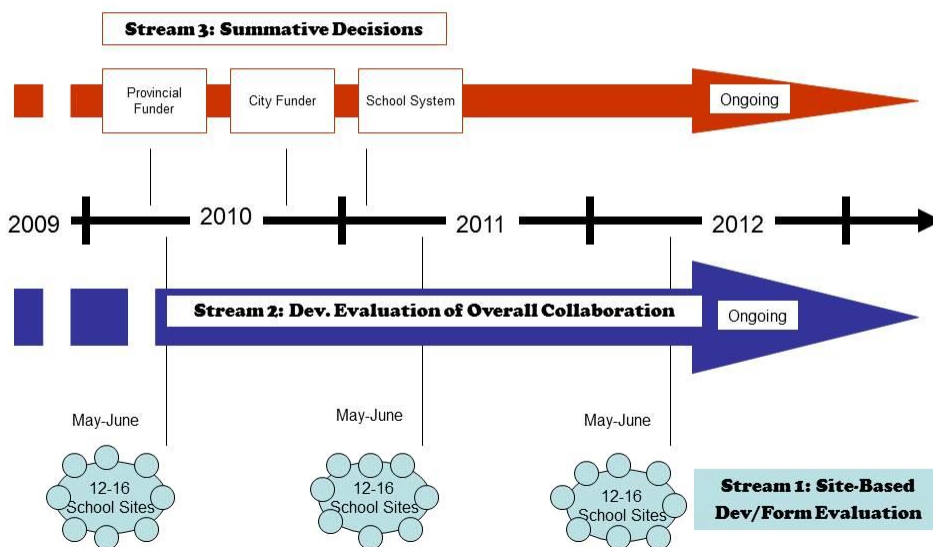| Example Evaluation Domains	
Operations	• To what extent are we manifesting the five conditions of collective impact (e.g. mutually reinforcing activities)? • What is working well, for whom, in what context and why?
Activities	• What are the various interventions in our CI efforts? • What is working for who, in what context, and why?
Results	• What are the most significant results from our work? • To what extent are we addressing the 'systems' underlying complex issues? • What are the cumulative results of our work?
Theory of Change	• What are we learning about the nature of the complex issues we are trying to address and how to address them? • What are the implications for our expected outcomes and theory of change?

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<u>Simple Rule #3</u>

Employ Multiple Users and Multiple Designs

- Develop an evaluation scope of work to identify who needs what information, when, for what purpose, packaged in what way, and when.

- Settle on evaluation priorities based on that assessment – you can't evaluate it all.

- Design multiple – sometimes overlapping – evaluation processes for different users.

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Example: School-Agency Collaboration

Stream 3: Summative Decisions

| Provincial Funder | City Funder | School System | Ongoing |

2009   2010   2011   2012

Stream 2: Dev. Evaluation of Overall Collaboration | Ongoing

May-June   May-June   May-June

12-16 School Sites   12-16 School Sites   12-16 School Sites   **Stream 1: Site-Based Dev/Form Evaluation**

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<u>Simple Rule #4</u>
Proceed with shared measurement but do so carefully.

Shared Measurement …

… is critical but not essential to productive action,

… can limit strategic thinking,

… requires systems change,

… is time consuming and expensive,

… might sometimes get in the way of action.

The case for shared measurement is strong but proceed carefully.

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Challenge: Unanticipated Outcomes

- Traditional evaluation emphasizes tracking progress towards desired outcomes.

- All interventions into a complex system generate a splatter of effects – many of which are unanticipated.
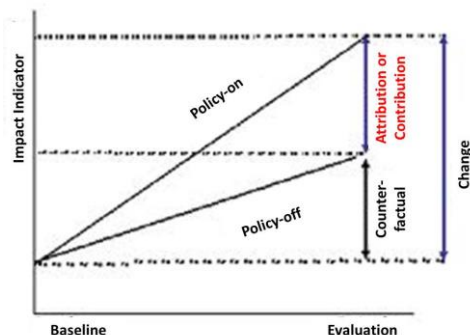
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<u>Simple Rule #5</u>

Seek to capture anticipated and unanticipated effects of your work.

- Use post-pre budgets in an addition to a pre-post budgets so people can "chase" emergent outcomes retrospectively.

- Employ participatory "wide net" methodologies to capture outcomes: e.g. outcome harvesting, most-significant change.

- Focus one part of the measurement on assessing "goal attainment" while the other surfaces and elaborates on "what has changed"?

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Challenge: Attribution

- Traditional evaluation seeks to establish a clear link between innovation activities and results.

- The activities and effects of interventions into a complex system are often only "one" factor contributing to observed changes.
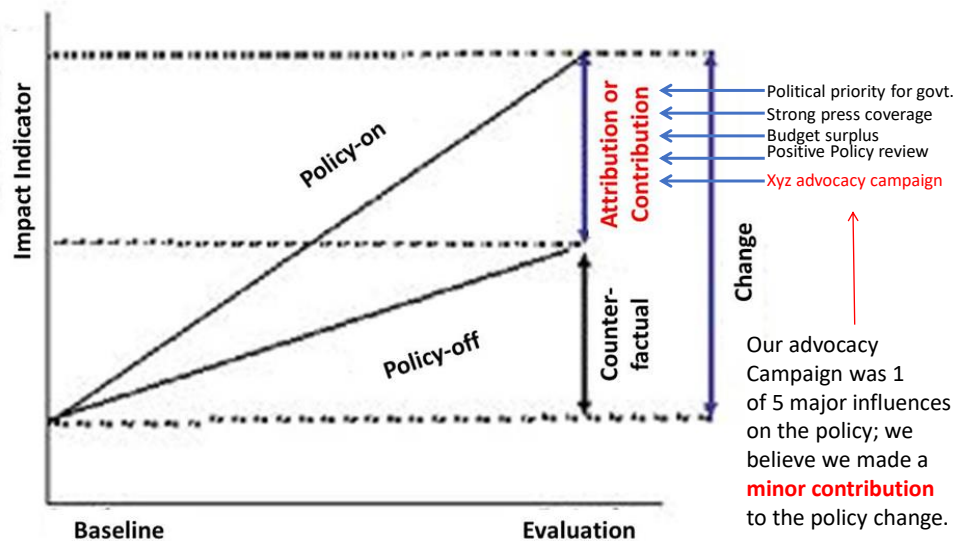
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Simple Rule #6

Seek to get a rough sense of contribution to observed changes rather than a definition account of attribution.

- Formally acknowledge the 'attribution and contribution' challenge.

- Use contribution methodology to identify all the other likely contributions to observed changes.

- Develop a rough weighting or rating of a group's activities to observed changes.

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Example

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QUESTIONS?

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THANK YOU

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