



Social Impact Consultants

Discovering better ways
to solve social problems

Developing Shared Measures in Collective Impact

Presentation and conversation with:

- **Fay Hanleybrown**, Managing Director, *FSG*
- **John Rook**, President & CEO, *Calgary Homeless Foundation*
- **Margaret Eaton**, Executive Director, *TRIEC*

April 17, 2013

Agenda

- I. Overview of Shared Measurement – *15 minutes***
- II. Designing and Deploying Shared Measurement Systems: Case Examples – *45 minutes***
- III. Questions & Answers – *20 minutes***
- IV. Small Group Discussion and Debrief – *45 minutes***
 - I. Wrap-up – *5 minutes***



“My question is: Are we making an impact?”

Shared Measurement Is a Critical Piece of Pursuing a Collective Impact Approach

Definition

Identifying common metrics for tracking progress toward a common agenda across organizations, and providing scalable platforms to share data, discuss learnings, and improve strategy and action

Benefits of Using Shared Measurement

- Improved Data Quality
- Tracking Progress Toward a Shared Goal
- Enabling Coordination and Collaboration
- Learning and Course Correction
- Catalyzing Action

Developing Shared Measurement Systems Requires Funding, Broad Engagement, Infrastructure and a Commitment to Learning

Effective Relationship with Funders



Strong leadership and substantial funding (multi-year)



Independence from funders in devising indicators, managing system

Broad and Open Engagement



Broad engagement during design by organizations, with clear expectations about confidentiality/transparency



Voluntary participation open to all organizations

Infrastructure for Deployment



Effective use of web-based technology



Ongoing staffing for training, facilitation, reviewing data accuracy

Pathways for Learning and Improvement



Testing and continually improving through feedback



Facilitated process for participants to share data and results, learn, and better coordinate efforts

Several Challenges Can Occur When Developing and Implementing Shared Measurement Systems

Challenges



Difficulty in **coming to agreement** on common outcomes and indicators



Concerns about **relative performance / comparative measurement** across providers working in the same space



Limited capacity (time and skill) for measurement and data analysis within participating organizations



Alignment among funders to ask for the common measures as part of their reporting requirements



Time and cost of developing and maintaining a system, both for human capital and technology

There Are a Number of “Tips and Tricks” to Bear in Mind When Developing Shared Measures

Identifying Indicators

- Limit “top-level” indicators to a manageable number (~15), with additional contributing indicators if needed
- Establish a set of criteria to guide the identification and prioritization of potential indicators

Collecting and Presenting Data

- Set specific and time-bound goals and report progress relative to targets
- Include data on whole populations (vs. a sample) where possible
- Use numbers as well as percentages to make goals more tangible

Leveraging Existing Efforts and Expertise

- Form a voluntary team of data experts to advise on the design, development, and deployment of a shared measurement system
- Develop a crosswalk of what partners are already measuring
- Consider leveraging existing indicators adopted by relevant efforts at the local, provincial, or federal level

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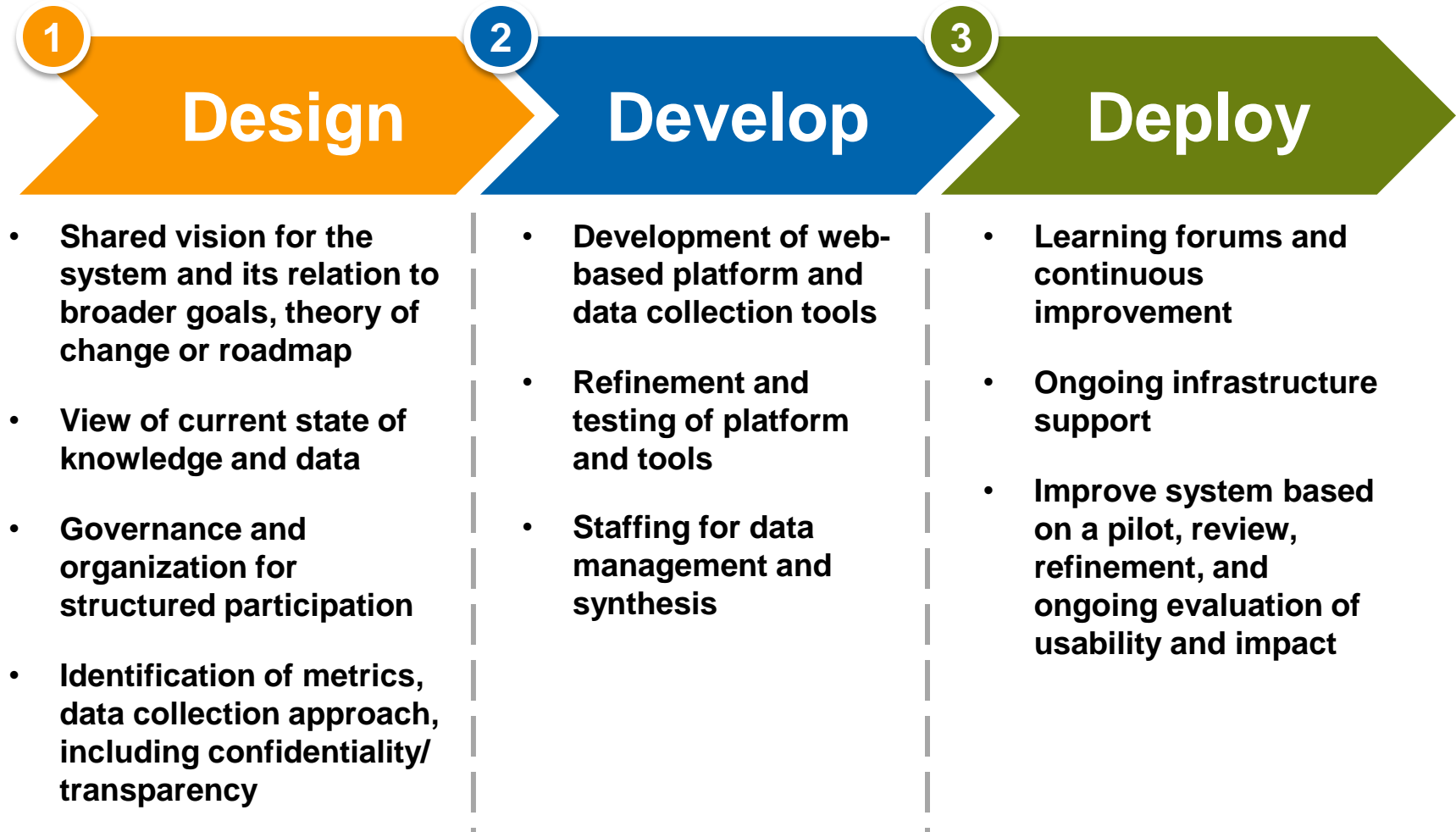
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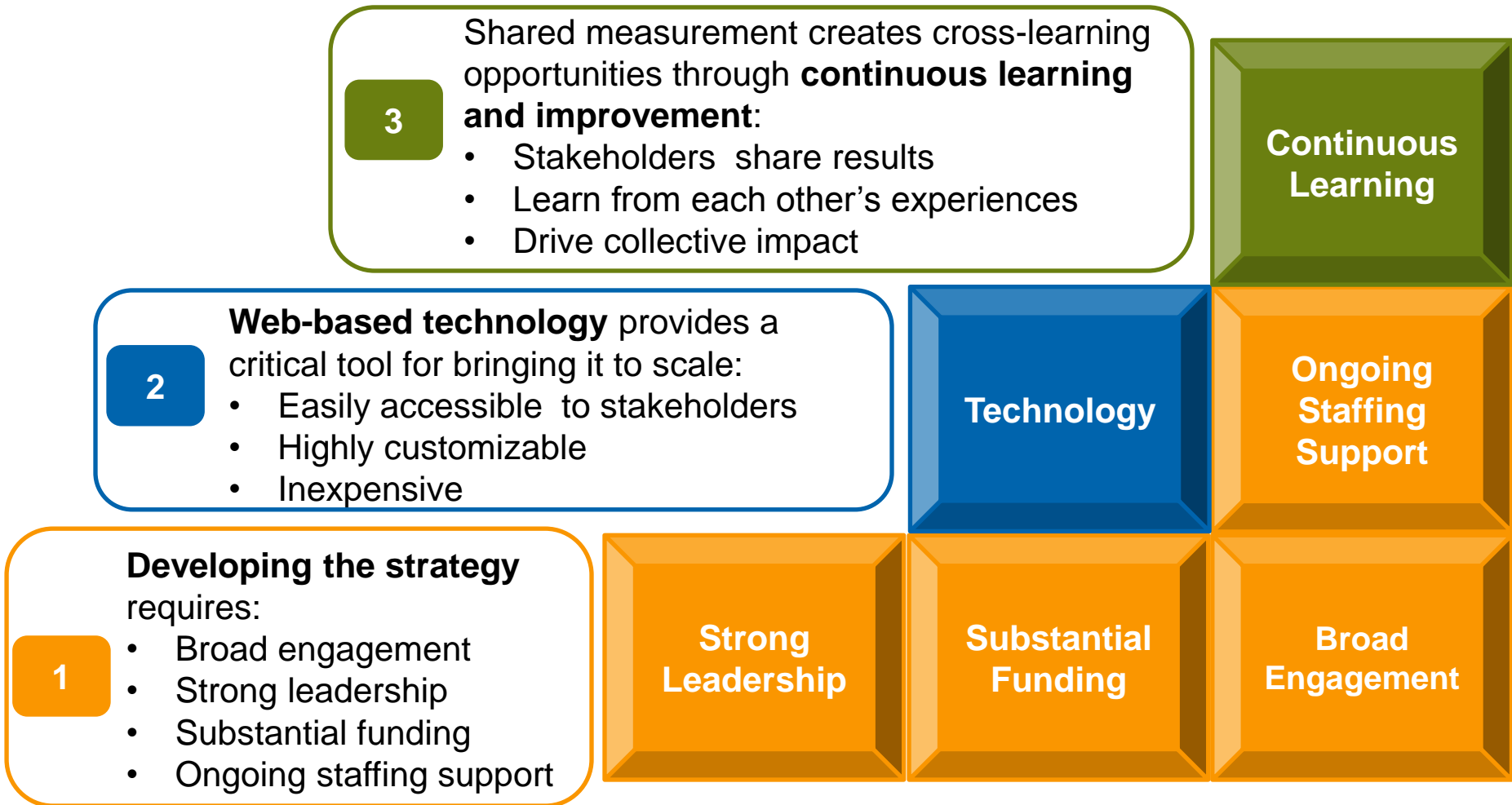
I. Wrap-up – 5 minutes

There Are Three Phases to Developing a Shared Measurement System

Developing a Shared Measurement System



Shared Measurement Is Built on Common Pieces of Strategy, Learning, and Evaluation





The Calgary 10 Year Plan to End Homelessness Unites Cross-Sector Actors To End Homelessness in Calgary, Canada

Collective Impact Need

In 2006, Calgary had Canada's fastest growing homeless population (3,500 sleeping in shelters, outside).

Homelessness increased at a staggering rate of 650 per cent in the last decade. At the same time as the rate of homelessness increased, so too did the severity; between 1997 and 2002 the percentage of people who reported being homeless for over a year more than doubled.

Solution and Goal

10 Year Plan to End Homelessness was created

Goal: By 2018, any person experiencing homelessness will have a plan towards safe, decent, affordable housing within 7 days of entering the homeless system, and this plan will include the supports required to maintain that housing.

Calgary Committee to End Homelessness: community-based initiative that was launched in January 2007 in response to our city's growing homelessness crisis. The goal, was not to find new ways to manage or cope with homelessness, but to end it.

The committee was comprised of agencies, private sector members, foundations, three governments, faith community, and Aboriginal leaders.

The Calgary 10 Year Plan to End Homelessness Unites Cross-Sector Actors To End Homelessness in Calgary, Canada

Implementation

Calgary Homeless Foundation (39 staff) serves as **system planner, funder, researcher, advocate, affordable housing developer & owner**

- Successes include the creation of a **System Planning Framework** to deliver the strategies and goals outlined in the updated 10 Year Plan to end Homelessness.

System Planning

- a transparent process to identify system gaps and priorities for investment, engaging community partners and leveraging HMIS data and research evidence;
- agreed upon program types across the homeless-serving system using common definitions;
- referral processes and eligibility criteria for homeless-serving programs;
- common intake, assessment, referrals and service coordination, with reporting through HMIS

The Calgary 10 Year Plan to End Homelessness Unites Cross-Sector Actors To End Homelessness in Calgary, Canada

System of Care

+ Service Intensity



Purposeful development, design and management of homeless serving system as a whole.

- System structure, program levels and definitions
- Priority populations, eligibility criteria, & referral to appropriate programs
- Measures & indicators
- Strategy development & priority setting process moving forward
- Quality Assurance, standards of care and program review
- Strategy Review and next steps for committee in ongoing System Planning

Calgary's Initiative Used a Highly Inclusive Process to Design a Shared Measurement System

Process for Development of Calgary's HMIS

1

Created Community Advisory Committee: Created to guide entire process of designing and developing shared measurement

2

Homeless Management Information System (HMIS)

Conceptualization: Collaborative, transparent, consistent process through community engagement

3

Establish Governance and Structure of HMIS: Community advisory committee guided this process

4

System Design: Established framework for all agencies to operate in

5

Software Vendor Selection: Demonstrations included front line staff and majority voting process within community

6

Monitoring and Feedback: Support and encouragement of all agencies to using the HMIS

In Calgary, Shared Measures Have Been Defined Around Reducing Homelessness

HMIS System



Systems Measures

- Occupancy
- Destinations at exit
- Return to shelter/rough sleeping
- Discharge from public institutions

Program Measures

- Income gains at exit
- Length of stay/stability
- Client rate of engagement
- Self-sufficiency measures

How Calgary is Using HMIS

- System planning, development and evolution
- Responding to real time changes in homelessness
- Program monitoring and quality improvement
- Annual strategic review and annual business planning process
- Data based 10 Year Plan implementation & investment decisions

Developing Calgary's HMIS Surfaced Several Key Learnings for Other Initiatives Developing Shared Metrics

Systems Focus and Alignment

- Shared measurement process led to rethinking of plan implementation and helped structure system

Community Engagement

- Collaborative, transparent, consistent community engagement was critical and led to strong uptake

Access to All

- Made technology, training and cost accessible to all – equitable between big and small agencies

Technology is Secondary

- When designing a system, the technology is secondary to the process of developing shared measures

Moving Beyond Privacy Concerns

- Privacy concerns seemed to mask agency worry over scrutiny

The Shared Measurement Design Phase Can Include a Number of Steps



Steps for Design of Shared Metrics

- 1 Define Shared Vision for System**
- 2 Set Criteria**
- 3 Establish Governance and Build Working Groups**
- 4 Conduct Due Diligence and Metric Selection**
- 5 Vet and Engage Stakeholders**

The Road Map Project Uses Indicators to Guide its Progress toward Doubling the Number of College Graduates in the Seattle Area



“The Road Map Project’s goal is to double the number of students in South King County and South Seattle who are on track to graduate from college or earn a career credential by 2020. We are committed to nothing less than closing the unacceptable achievement gaps for low income students and children of color, and increasing achievement for all students from cradle to college and career.”

Work Groups Used a Multi-Step Process to Identify, Vet and Refine the Road Map Indicators



Developing Work Groups

- **Four work groups** formed in early learning, K-12 / in-school, K-12 / out-of-school, post-secondary) and were:
 - Chaired by key Road Map Project leaders
 - Included 10-15 members from nonprofit, public, and philanthropic sectors
- Groups were charged with **identifying indicators of student success** for their part of the cradle-to-college continuum

Identifying Indicators

- Each group used **criteria** to identify and prioritize indicators (see following slide)
- Work group chairs met to **calibrate indicators** across cradle-to-college continuum
- **Short-list** of top-level indicators were selected to set time-bound targets
- Additional **supporting indicators** are also tracked over time

Tracking Progress and Refining over Time

- The Road Map backbone (CCER) issues **baseline and annual reports** to track progress on all indicators where data is available
- A team of data experts **advises on indicators** over time so the list can evolve as warranted

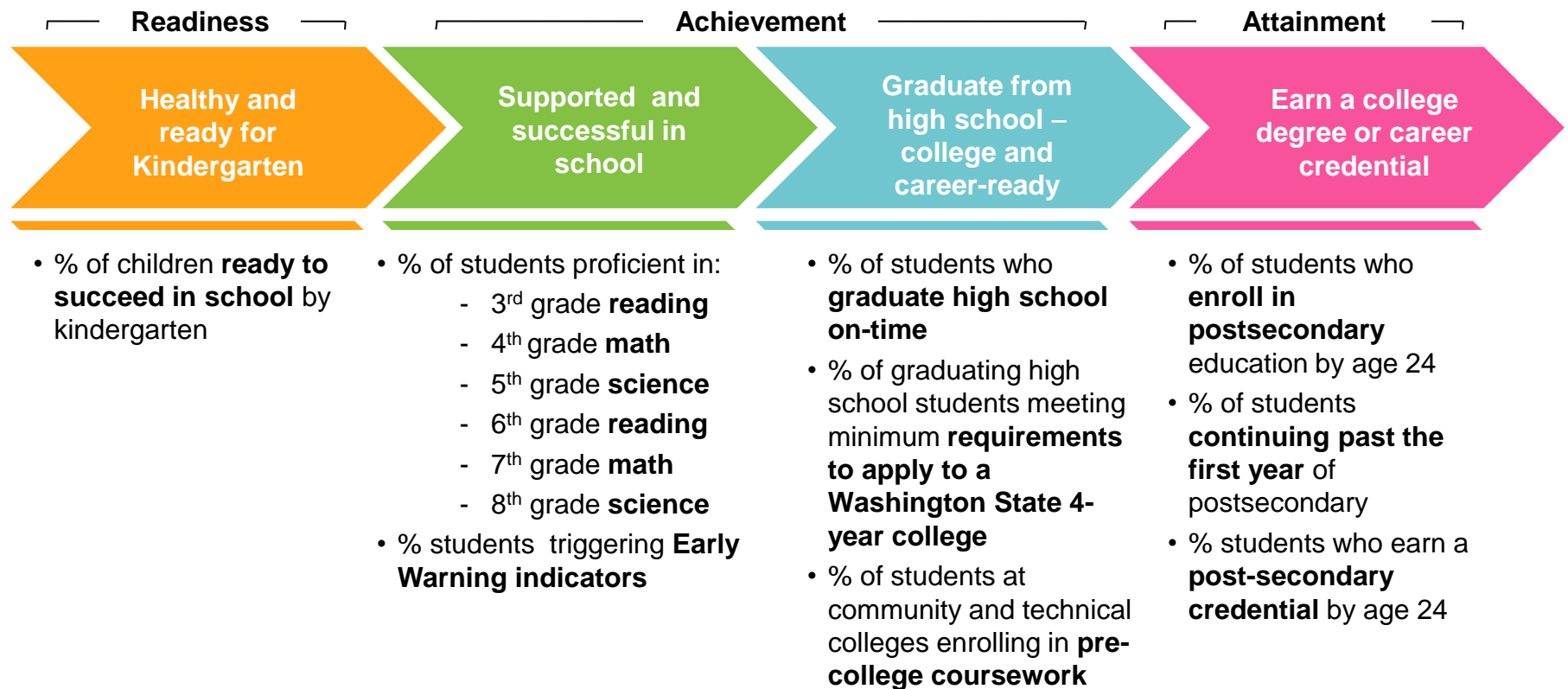
As Part of the Process for Agreeing on Shared Metrics, Work Groups Were Given a Set of Criteria to Guide Indicator Selection



The following were used as a guide for indicator selection¹

- Indicator must be valid measure linked to ultimate goal of postsecondary attainment and/or four sub-goals
- Indicator must be easily understandable to local stakeholders
- Data must be produced by trusted source
- Priority given to including indicators comparable across school districts (or neighborhoods), and having ability to be compared
- All or most indicators must be affordable to gather and report
- Data should be available consistently over time (preferably on annual basis or more frequently), should be recent (2008 or later), and easily disaggregated by county, City / S. King County community, and school (or neighborhood)
- Priority given to data that can also be disaggregated by ethnicity, socio-economic status, ELL, and gender
- Trend data should be provided over at least 3-year period (beginning with or including 2007)
- Each indicator should be able to be influenced to significant degree by local action, and be useful in daily work of this Working Group, other educators and organizations that are working to improve education

From this Process, Top Level Indicators Were Identified, Targets Were Set, and Progress Is Tracked Over Time



Deploying Shared Measures Enables Collaboration, Learning, Alignment of Efforts and Goals, and Continuous Improvement



Steps for *Learning* from Using Shared Measurement¹

- 1 Form Teams for Learning
- 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

The ‘Model for Improvement’ and the ‘Six Sigma Process’ are two examples of processes for leveraging shared measurement for learning

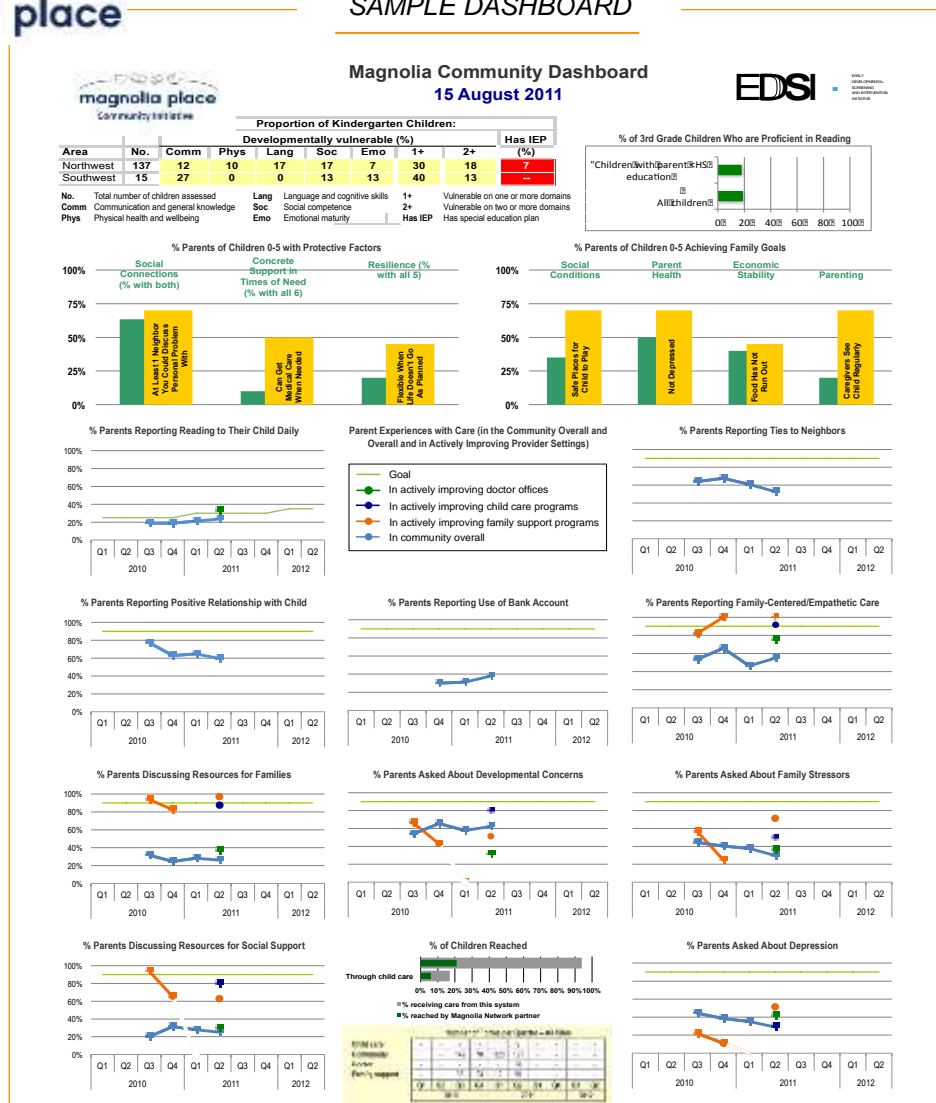
Note: Steps 1, 3-7 are directly adapted from the “Model for Improvement” developed by the Institute for Healthcare Improvement

Source: (1) Model for Improvement, Institute for Healthcare Improvement

Magnolia Place Has Developed a Dashboard to Hold Groups Accountable To the Initiative's Targeted Outcomes



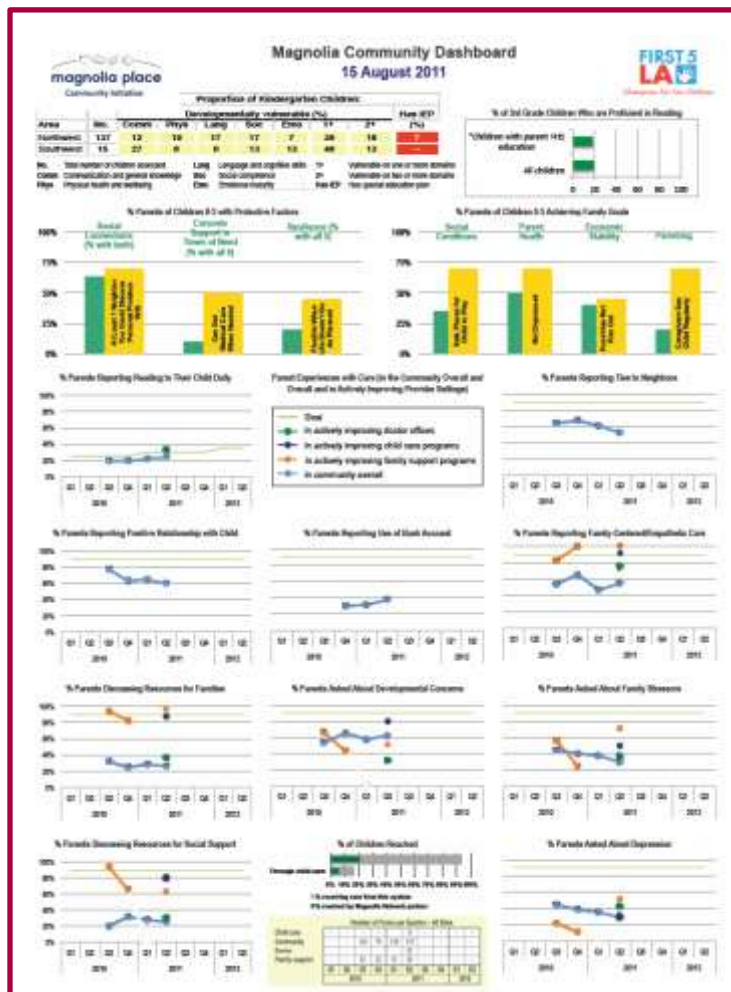
SAMPLE DASHBOARD



Long-term outcomes
(e.g. Developmental progress, by kindergarten; Reading proficiency, third grade)

Measures of real-time improvement in services and supports

The Use of Data Connects Programs and Providers, Enabling Shared Accountability and Collective Change



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



Source: FSG Interview and Analysis, Magnolia Place Initiative, Model for Improvement (Associates in Process Improvement)

Magnolia Place's Efforts to Learn From Shared Metrics Offer Several Key Learnings for the Field



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

Structure for Learning

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

Motivation and Engagement for Change

- Tapping into partners' knowledge, expertise, and creativity

Strategic Alignment

- Individual and group engagement on shared measures enables greater system functionality and alignment

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For the 45 Minutes, We Will Discuss Shared Measurement in Small Groups and Return for Full Group Debrief

Objective

To discuss key challenges and critical success factors for developing and deploying a shared measurement system

Discussion Questions

- What challenges have you encountered/ might you encounter as you develop shared metrics? How might you overcome those challenges? What critical factors do you think will be most important? (15 minutes)
- What challenges do you anticipate in deploying a shared measurement system? What processes would help you navigate those challenges? (15 minutes)

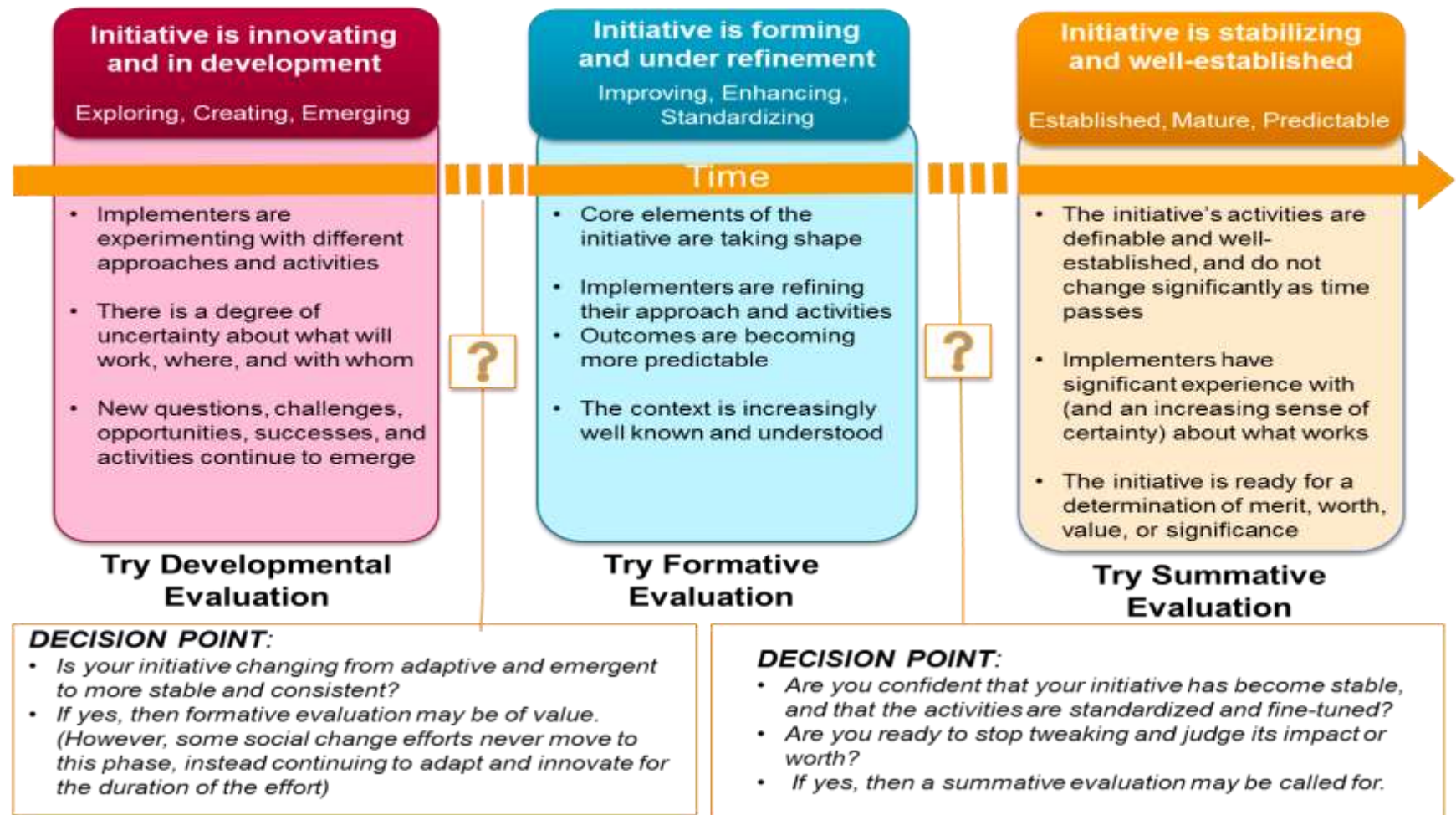
Debrief

Volunteers share highlights and themes from their table conversations (15 minutes)

Thank You!

- Thank you for being part of the conversation today
- For more information on Collective Impact and Shared Measurement and to download FSG's articles on the topic, visit www.fsg.org and click on *Collective Impact* or contact us at info@fsg.org

An Evaluation Approach Should Match an Initiative's Stage of Design and Implementation



Timing is critical for providing relevant, credible, and useful information

Developmental Evaluation (DE) Is a New Evaluation Approach Designed to Support Strategic Learning from Social Innovations

Developmental Evaluation

Developmental evaluation **informs and supports** innovative and adaptive development **in complex dynamic environments**. DE brings to innovation and adaptation the processes of **asking evaluative questions, applying evaluation logic, and gathering and reporting evaluative data** to support project, program, product, and/or organizational development **with timely feedback**.

—Michael Quinn Patton

Focuses on social innovations where there is **no accepted model** (and may never be)

Continuous learning is intentionally embedded to inform decision making

Design is adaptive, responsive, emergent, and dynamic

Evaluator is a **strategic learning partner** performing a non-traditional evaluative role

A **complex systems orientation** is brought to the evaluation

DE is particularly suited for innovative approaches to solving social problems where the path to success is not clear