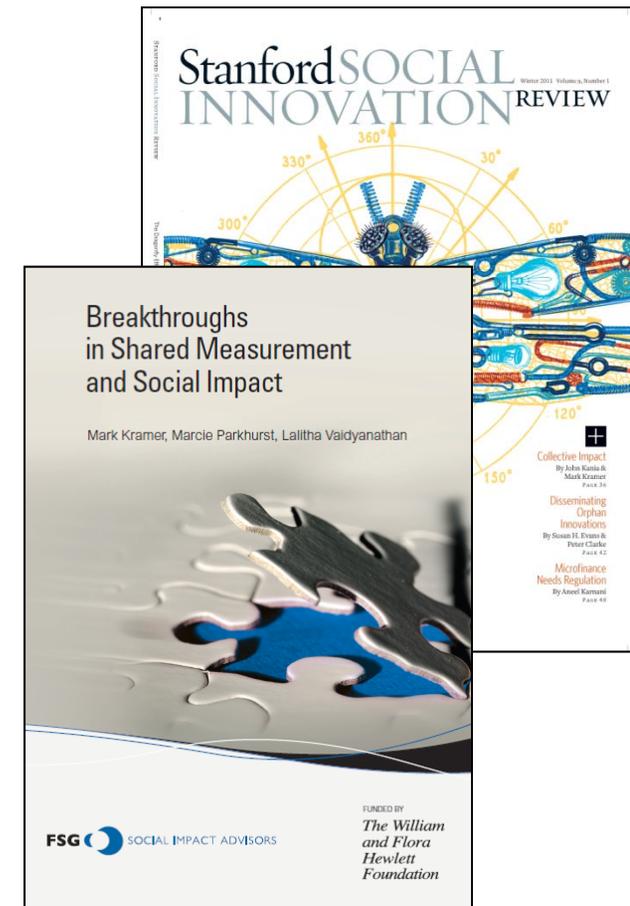# Collective Impact: Implementing Shared Measurement

A conversation with:

- **Fay Hanleybrown**, Managing Director, *FSG*
- **Tim Richter**, President and CEO, *Calgary Homeless Foundation: 10 Year Plan to End Homelessness*
- **Patricia Bowie**, MPH, Consultant, *Magnolia Place Community Initiative*

November 9, 2011

About FSG and Shared Measurement

- **Nonprofit consulting and research firm** founded out of Harvard Business School in 2000

- Staff of 90 in Boston, San Francisco, Seattle, Washington DC, Geneva, and a presence in Mumbai

- Success in **strategic planning and evaluation** with over **200 foundations, corporations, and nonprofits**

- **Thought leader**
  - Articles published in *Harvard Business Review, Stanford Social Innovation Review,* and *American Journal of Evaluation*, including **Collective Impact** (SSIR 2010)
  - ***Breakthroughs in Shared Measurement and Social Impact*** *(funded by Hewlett Foundation)* published in 2009, and examined 20 approaches to performance, outcome, and impact measurement

FSG is driven by the same passion that drives our clients: a passion for greater social impact

2

Today's Agenda

Overview of Collective Impact and Shared Measurement
  Fay Hanleybrown, Managing Director, FSG

Designing and Developing Shared Metrics
  Tim Richter, President and CEO, Calgary Homeless Foundation

Learning from Shared Measurement
  Patricia Bowie, MPH, Consultant, Magnolia Place Community Initiative

Audience Questions & Answers

Wrap-up

There Are Several Types of Problems

Simple	Complicated	Complex
Baking a Cake	*Sending a Rocket to the Moon*	*Raising a Child*

**The social sector often treats problems as simple or complicated**

Traditional Approaches Are Not Solving Our Toughest Social Problems

Isolated Impact

- Funders select **individual grantees**

- Nonprofits **work separately** and **compete**

- **Evaluation** attempts to **isolate** a particular organization's impact

- Large scale change is assumed to depend on **scaling organizations**

- Corporate and government sectors are often **disconnected** from foundations and non-profits

Collective Impact
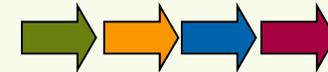
- All players work toward the **same goal** and **measuring the same things**

- **Cross-sector alignment** occurs, with government and corporate sectors as **essential partners**

- Organizations actively **coordinate** their action and share lessons learned

Imagine a Different Approach – Multiple Players Working Together to Solve Complex Issues

Source: Stanford Social Innovation Review: Collective Impact, Winter 2011

Shared Measurement is a Critical Piece of Pursuing a Collective Impact Approach
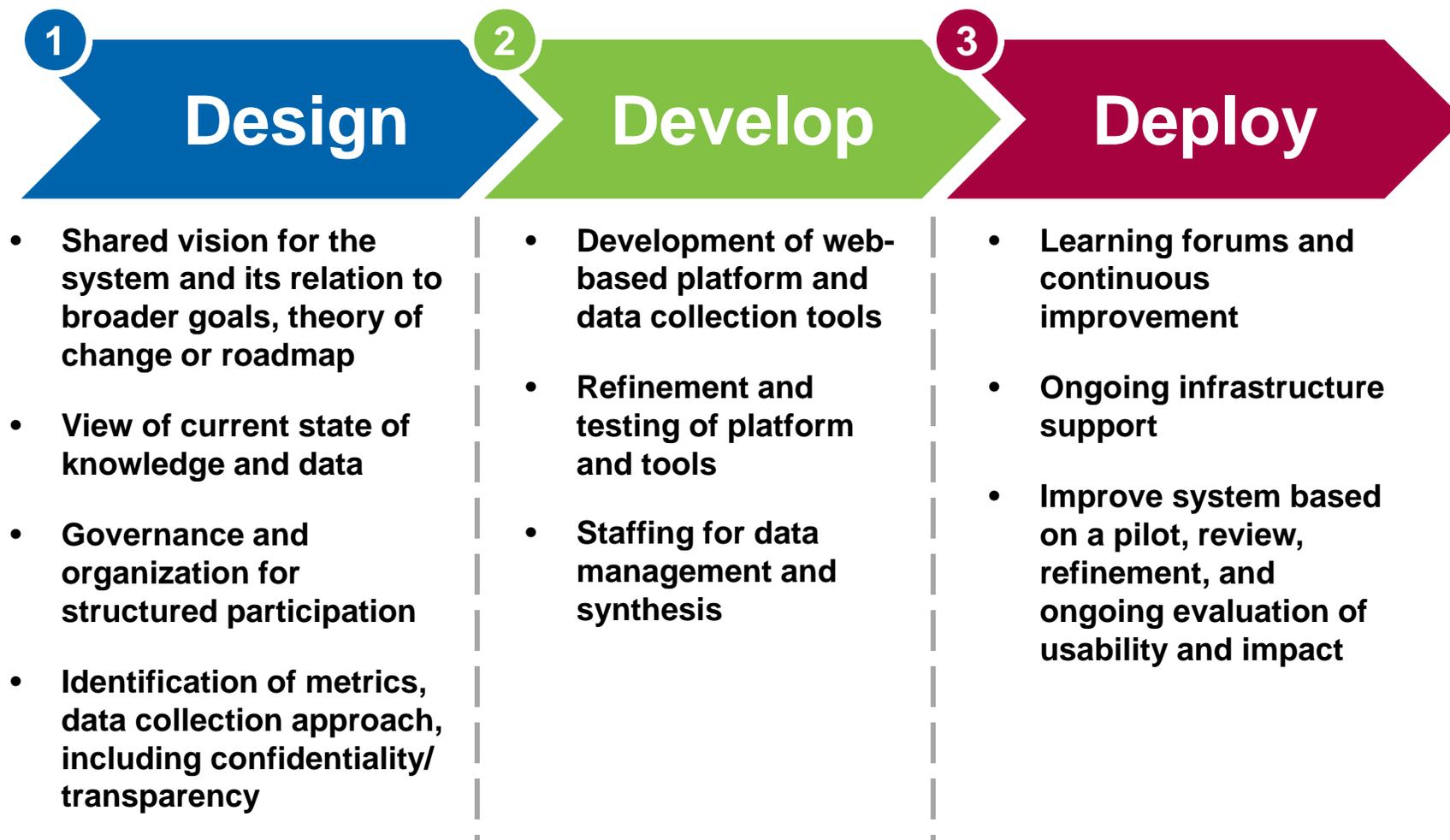
Definition

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**

Source: Breakthroughs in Shared Measurement and Social Impact, FSG, 2009

6

There are Three Phases to Developing a Shared Measurement System

Developing a Shared Measurement System

1 Design	**2** Develop	**3** Deploy
• **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

Key Success Factors in the Development of Shared Measurement Systems

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

8

Source: Breakthroughs in Shared Measurement and Social Impact, FSG, 2009

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)

Solution and Goal

10 Year Plan to End Homelessness was created

Goal: By 2018, no person will spend more than 7 days in an emergency shelter before moving into a safe, decent affordable home with the support needed to sustain it

Calgary Committee to End Homelessness: Agencies, **private sector**, **foundations**, **3 governments, faith community, aboriginal leaders** came together

Implementation

Calgary Homeless Foundation (35 staff) serves as **system planner, funder, researcher, advocate, affordable housing developer & owner**

- There was a realization that data improvements and shared measurement were needed; in addition, there was a realization the system needed alignment

- Shared measurement allowed stakeholders to conceptualize and structure the system

9

Source: FSG Interviews and Analysis; Calgary Homeless Foundation

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 in which to operate for all agencies

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
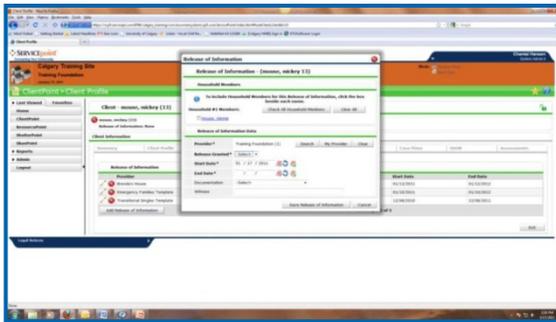
Systems Measures

- 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

Note: System cost: $250-$300k per year; Calgary HMIS system is based on the National Alliance to End Homelessness HMIS system
Source: FSG Interviews, Calgary Homeless Foundation, Bowman Systems   11

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

Source: FSG Interviews and Analysis

The Magnolia Place Community Initiative Seeks to Unite The Entire Community to Create Sustainable Change for Families

Collective Impact Need

Magnolia Area, encompassing 5 square miles, 500 blocks in metro L.A., has **low resources and high challenges**: dismal education, high poverty, unemployment

Solution and Goal

Magnolia Place initiative was created **with aim of all children in the Magnolia catchment area (35,000) breaking all records of success in their education, health, quality of nurturing care and economic stability** they receive from their families and community. The initiative will increase protective factors and the reliability of service/support systems in providing prevention and timely need-based care

Implementation

70 cross-sector groups aligned toward 4 anchor goals:

1. Educational success
2. Good health
3. Economic stability
4. Safe and nurturing parenting

- Initiative is voluntary and based on peer learning
- Initiative is driven forward by strengthening relationships among and between residents, community groups and organizations

13

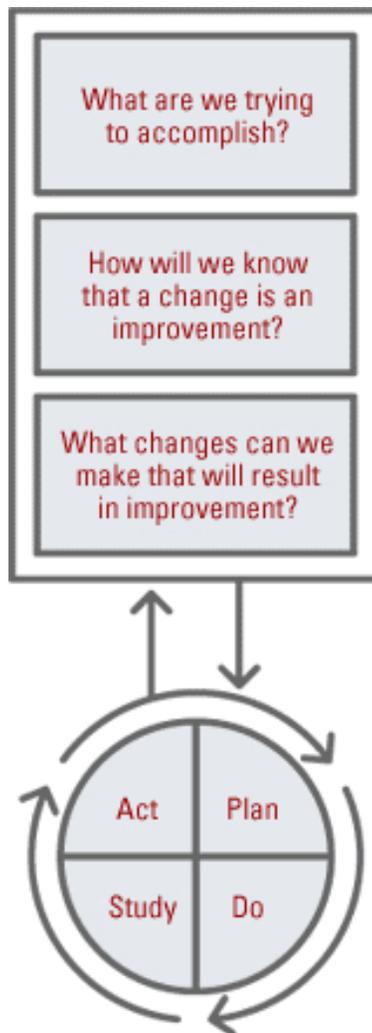# Magnolia Place Has Developed a Dashboard to Hold Groups Accountable To the Initiative's Targeted Outcomes

SAMPLE DASHBOARD
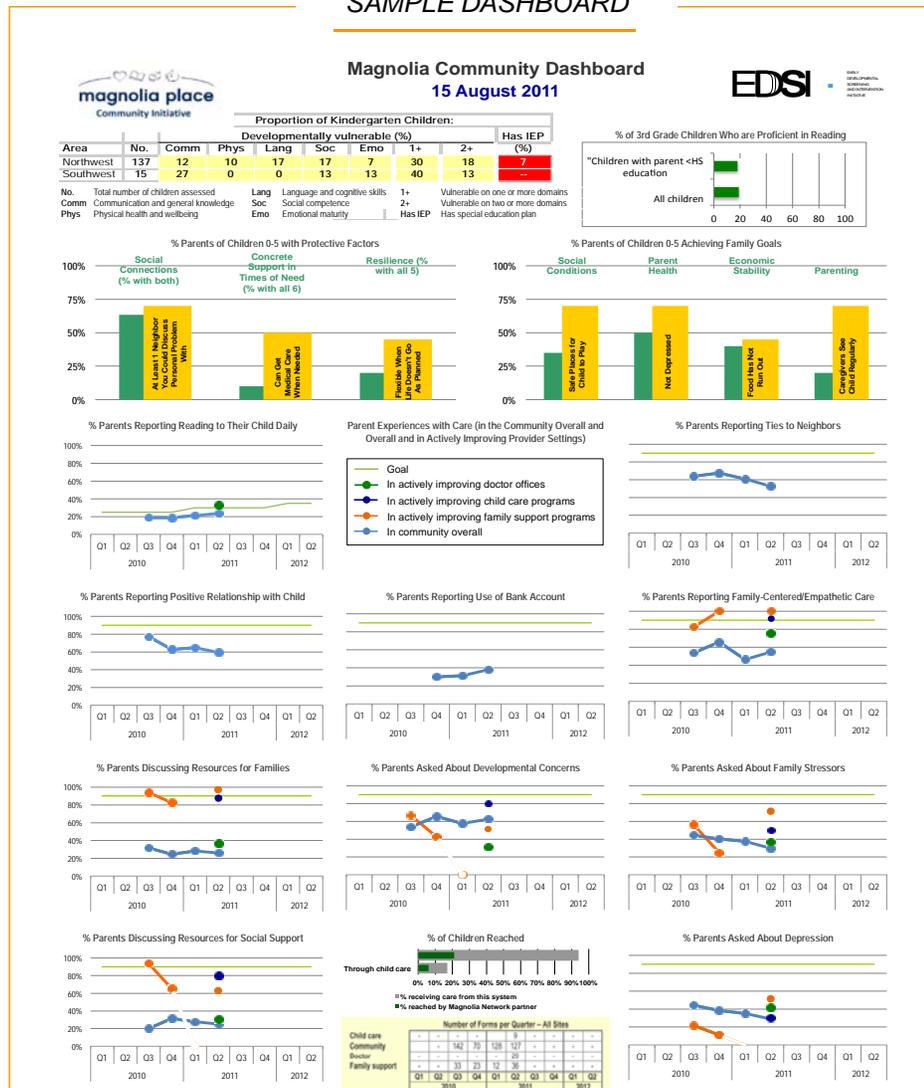
Long Term Outcomes (e.g. Developmental progress, by kindergarten; Reading proficiency, third grade)

Measures of real-time improvement in services and supports

Source: Magnolia Place Community Initiative

14

Magnolia Place Uses the *Model for Improvement* for Enabling Shared Learning on Collective Change

What are we trying to accomplish?

How will we know that 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:

Specific
Measurable
Action oriented
Realistic
Timely

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

Example of Using Model for Improvement

Tracking warm referrals

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

Source: FSG Interviews and Analysis

Audience Questions

Fay Hanleybrown
FSG

Tim Richter
Calgary Homeless Foundation

Patricia Bowie
Magnolia Place

Thank You!

- Thank you for joining in the conversation today

- Please fill in the brief electronic survey that you'll receive after today's event to share your feedback with us

- For more information on Collective Impact, and to download the SSIR article, visit **www.fsg.org** and click on *Collective Impact* or contact us at *info@fsg.org*