COLLECTIVE IMPACT FORUM

FSG

Evaluating Collective Impact:

Assessing Your Progress, Effectiveness, and Impact

June 2014

Today's Agenda

- **Welcome**
  Jennifer Juster, Collective Impact Forum
- **Context for the Guide to Evaluating Collective Impact**
  Hallie Preskill, FSG
- **Overview of Evaluating Collective Impact**
  Marcie Parkhurst, FSG
- **Learning from the Road Map Project**
  Mary Jean Ryan, Community Center for Education Results
  Christopher Mazzeo, Education Northwest
  - **Road Map Project Q&A** *(Moderated by Hallie Preskill, FSG)*
- **Learning from the Infant Mortality Initiative**
  Kathleen Holmes, Missouri Foundation for Health
  Jewlya Lynn, Spark Policy Institute
  - **Infant Mortality Initiative Q&A** *(Moderated by Hallie Preskill, FSG)*
- **General Q&A** *(Moderated by Hallie Preskill, FSG)*
- **Collective Impact Forum Information and Close**
  Jennifer Juster, Collective Impact Forum

#collectiveimpact
#evaluation

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The Guide to Evaluating Collective Impact Offers a Way to Think About, Plan for and Implement Evaluation and Performance Measurement Activities

Why did we write the guide?

Demand has grown for an effective approach to evaluating collective impact that meets various parties' needs

Who is the guide for?

Collective impact practitioners, funders, evaluators, and other supporters

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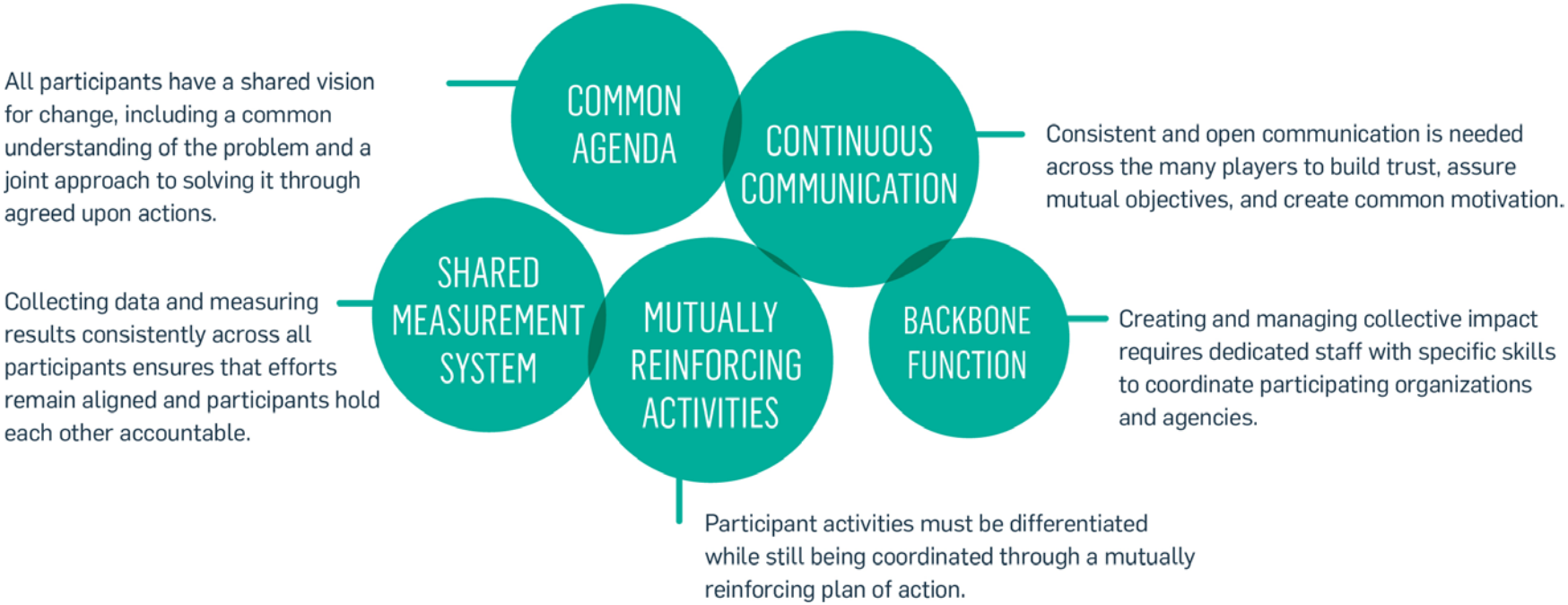
Collective Impact Is an Effective Approach to Addressing COMPLEX Problems

The Five Conditions of Collective Impact



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Evaluating Collective Impact Requires a Mindset Shift for Many Funders and Practitioners

Typical Focus of Program Evaluation	Evaluating CI as a Complex Intervention
Assessing the impact of a **specific intervention**	Assessing **multiple parts of the system,** including its components and connections
Evaluating effects and impact according to a **predetermined set of outcomes**	Evaluating intended and unintended outcomes as they **emerge over time**
Using logic models that imply cause and effect, and **linear** relationships	Evaluating **non-linear and non-directional relationships** between the intervention and its outcomes
Providing findings **at the end** of the evaluation	Embedding **feedback** and **learning** through the evaluation

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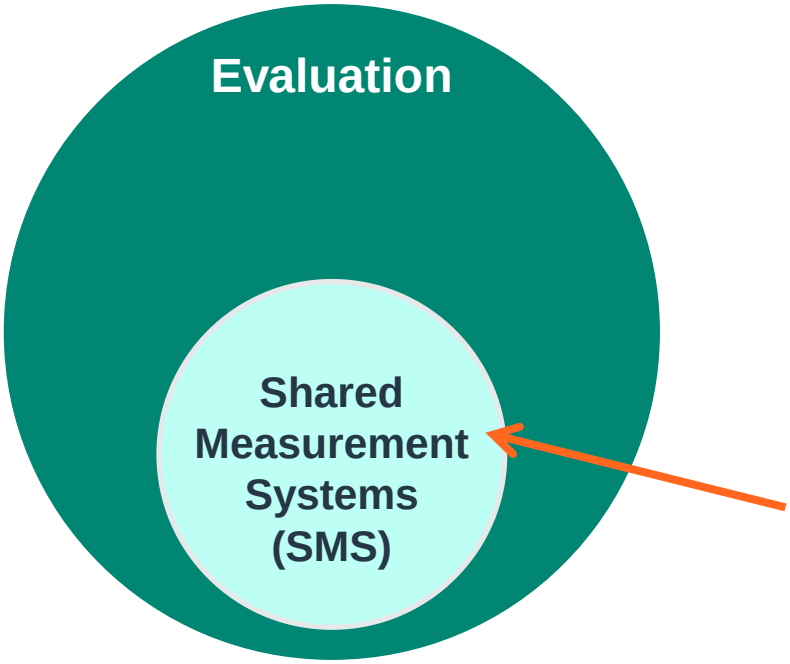
Collective Impact Efforts Should Use *Both* Shared Measurement *and* Evaluation to Understand Their Effectiveness and Impact



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

SMS can be both an input to evaluation (by providing data and/or shaping evaluation questions) and an object of evaluation

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Evaluating a Collective Impact Effort Involves Looking at Four Aspects of the Work

		For example…
1	The initiative's **context**	• 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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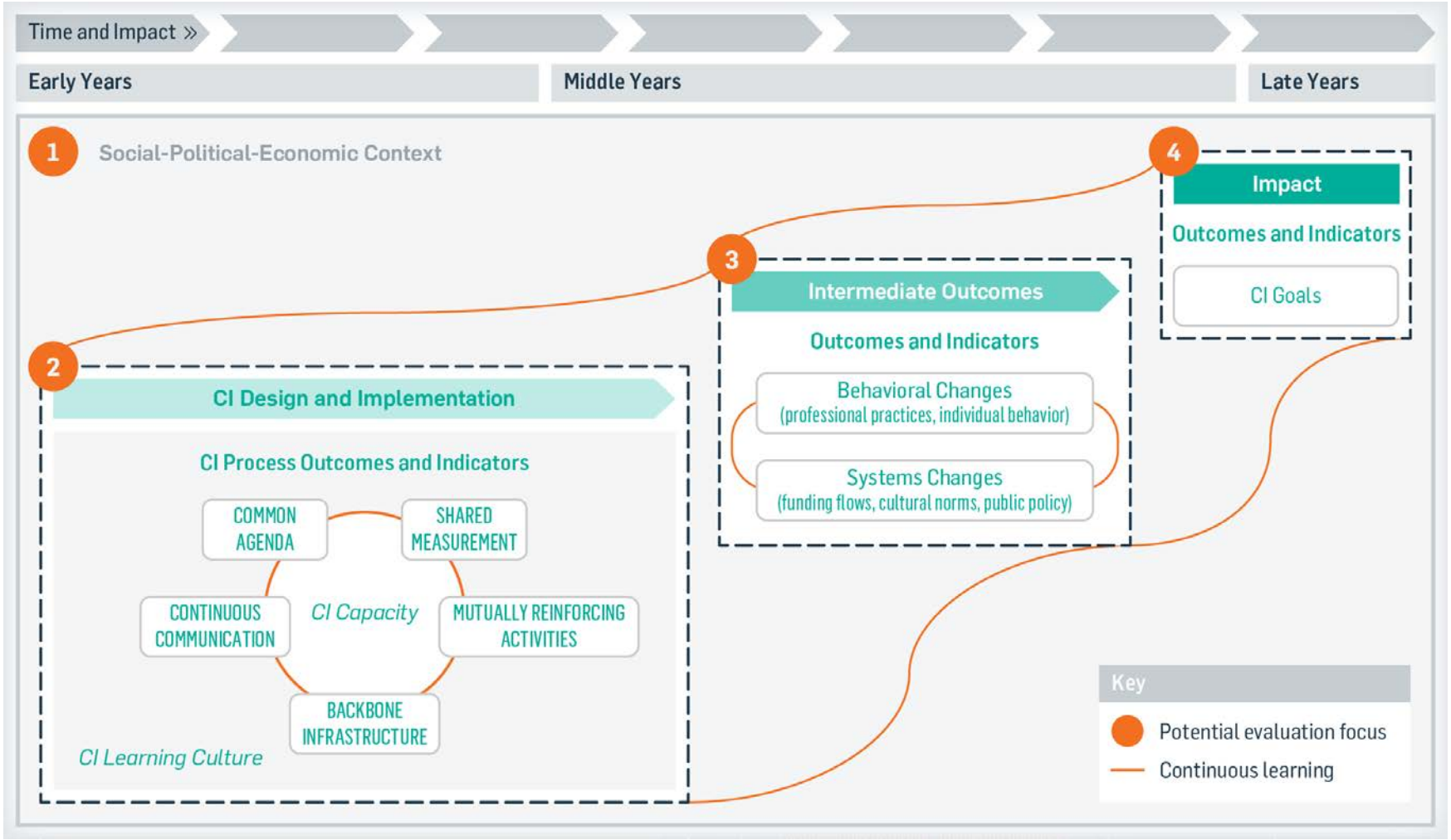
Collective Impact Theory of Change



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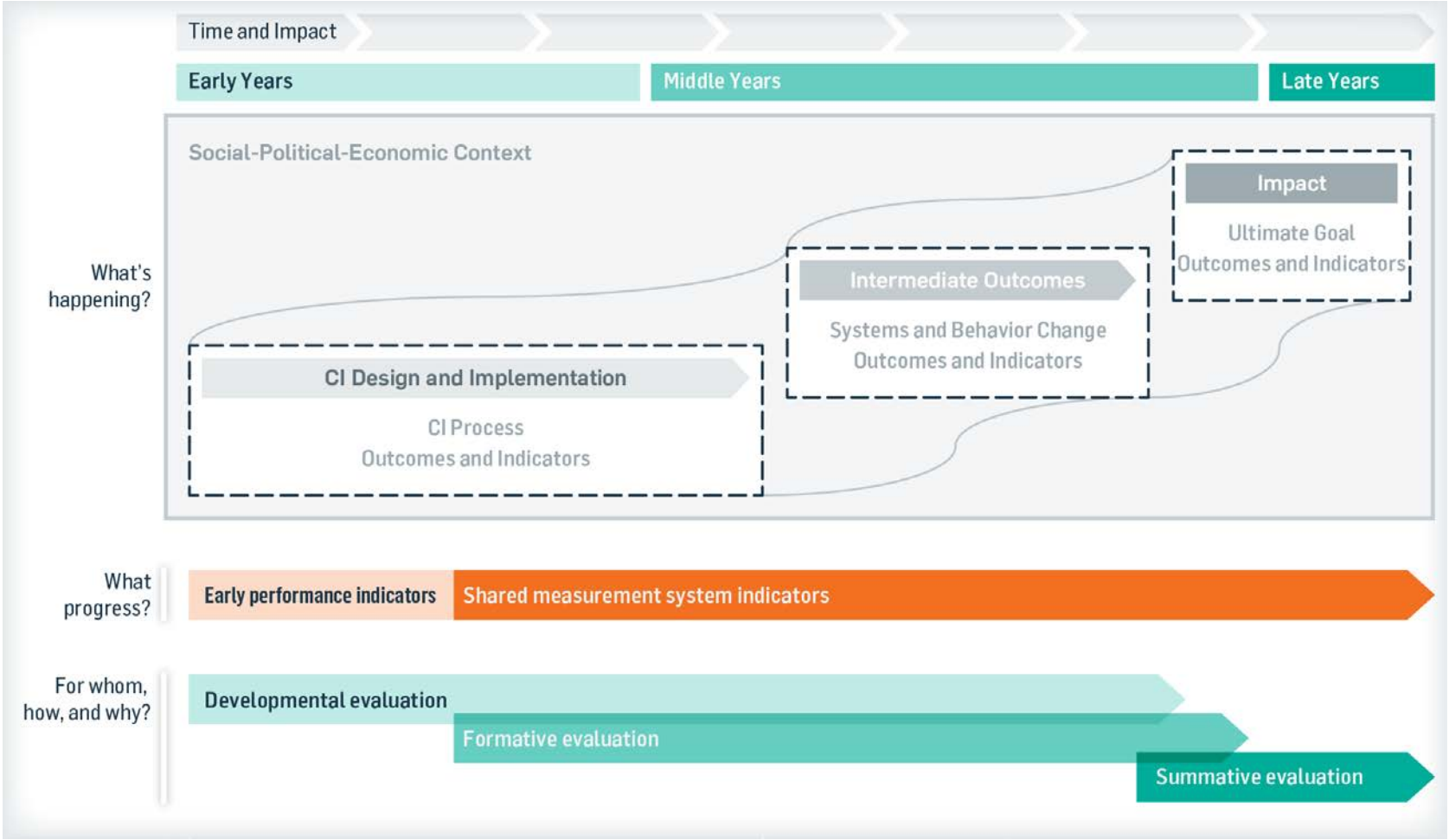
The Focus of Evaluation – and the Data Collection Methods Used – Will Evolve Throughout the Life of the Collective Impact Initiative



CI partners can use the framework to help focus their evaluation

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Collective Impact Partners Should First Identify the Key Learning Questions They Seek to Answer

Sample Learning Questions

1 Context

- What are the cultural, socioeconomic, and political factors that are influencing the design and implementation of the CI initiative?

2 CI Design & Implementation

Backbone Infrastructure

- To what extent and in what ways is the backbone infrastructure providing the leadership, support, and guidance partners need to do their work as planned?

3 Intermediate Outcomes

Changes in Systems

- To what extent / in what ways are flows of philanthropic/ public funding shifting to support the goals of the CI initiative?
- To what extent / in what ways are social and cultural norms evolving in ways that support the goals of the CI initiative?

4 Impact

- To what extent has the CI initiative achieved its ultimate outcomes?
- What has contributed to or hindered the achievement of the CI initiative's goals?

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Example: Outcomes and Indicators
Backbone Infrastructure

Learning Question: To what extent, and in what ways is the backbone providing the leadership, support, and guidance partners need to do their work as planned?

Sample Outcomes	Sample Indicators
The backbone infrastructure (BBI) effectively guides the CI initiative's vision and strategy	• BBI builds and maintains hope and motivation to achieve the initiative's goals • BBI celebrates and disseminates achievements of CI partners internally and externally • Partners look to the BBI and SC for initiative support, strategic guidance and leadership
The backbone infrastructure ensures alignment of existing activities, and pursuit of new opportunities, toward the initiative's goal	• BBI provides project management support, including monitoring progress toward goals and connecting partners to discuss opportunities, challenges, gaps, and overlaps • BBI convenes partners and key external stakeholders to ensure alignment of activities and pursue new opportunities

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Key Takeaways

1

Embed evaluation in the initiative's DNA

2

Set reasonable expectations

3

Be thoughtful about your evaluation partners

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The Road Map Project
Overview

The **Road Map Project** is a collective impact initiative aimed at getting dramatic improvement in student achievement – cradle through college/career in South Seattle and South King County.

120,890 Students in Road Map Project Region Schools

67% Students of Color

59% Low Income

16% English Language Learners

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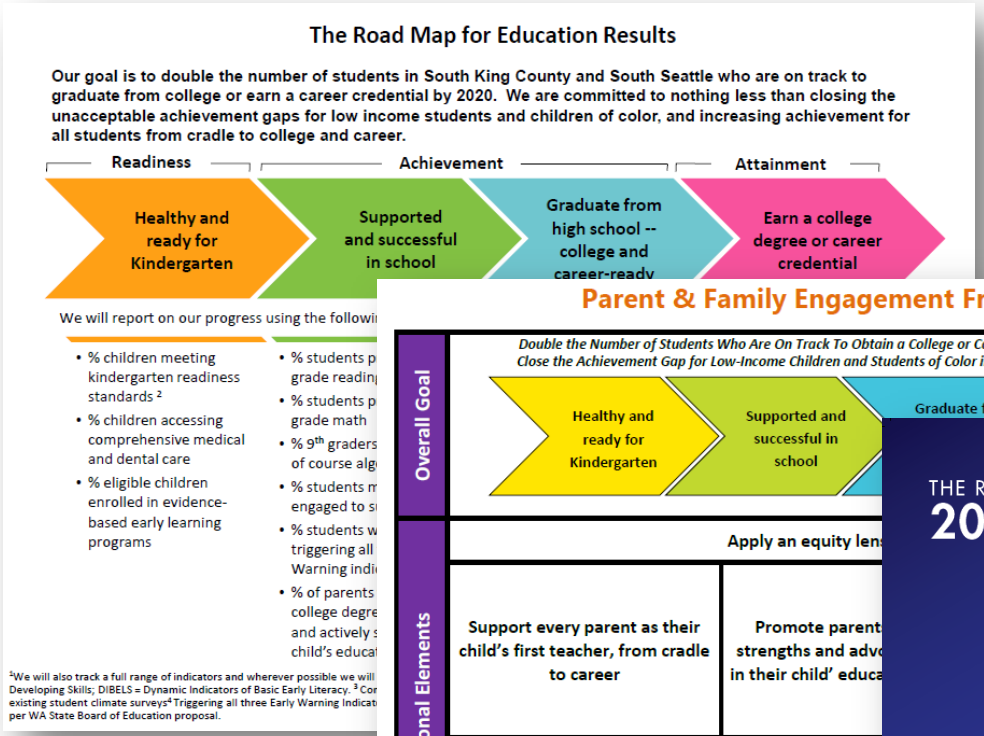
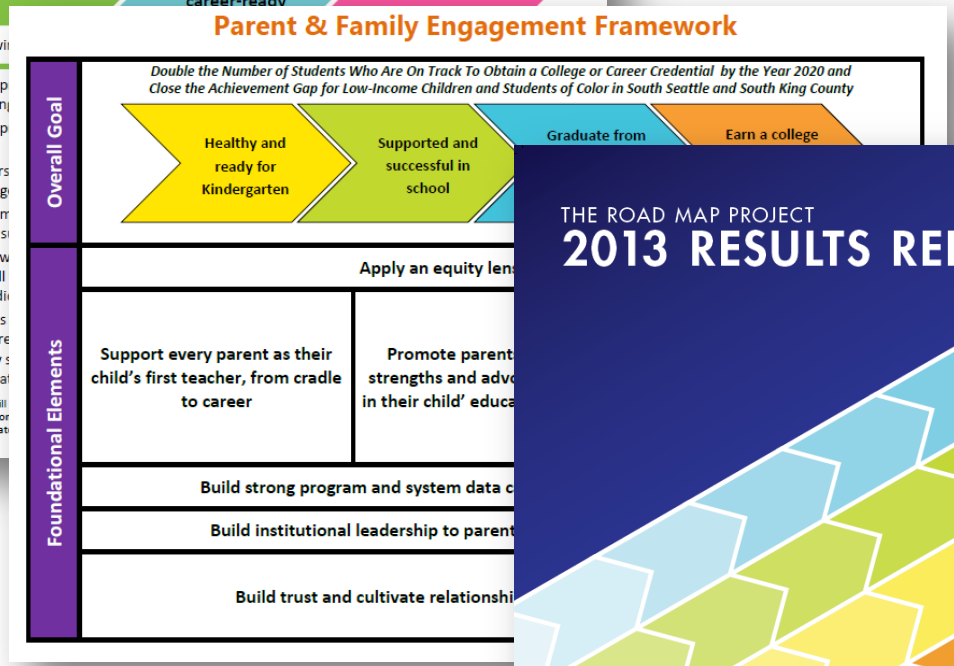
The Road Map Project

Indicators of Student Success, Action Plans, and Tracking Progress





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The Road Map Project

How Do We Reach the Goal? Collective Action at Work

Alignment + Parent & Community Engagement + Power of Data + Stronger Systems

= 2020 GOAL

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The Road Map Project
Evaluation Questions

How is the Road Map Project being implemented on the ground?

- Role of various partners and regional organizations
- Plans and actions of key workgroups
- Supports provided by the backbone organization

In what ways does the Project use its core strategies (alignment, engagement, data) to catalyze systems change in the region?

What systems changes are occurring within and across organizations and the region as a result of Road Map?

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The Road Map Project
Key Findings

Alignment

- Partners are beginning to align their policies, practices and funding decisions with Road Map goals and indicators

Engagement

- Knowledge and buy-in for the Road Map goal is very high
- There is “more work to be done” to ensure all stakeholders are meaningfully engaged

Data

- There has been tremendous success in building data capacity and adopting common metrics across organizations in the region

Stronger Systems

- There has been a substantial increase in collaboration both within and across sectors

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The Road Map Project

CCER Reflections on Evaluating the Road Map Project

Evaluation Finding	Response
Strong, broad support for 2020 Goal	• 2020 Goal stays front and center
Continuous communication: Improve communication and engagement options	• Better Connections: new newsletter, RMP 101 events, strategic communication plan • More Voices: Leadership group expansion, advocacy re-organization
Common agenda: Increase focus on equity and inclusion	• Reporting framework changed • Awards program explicit about equity • Results Roundtables for Race/Ethnic groups
Shared measurement system: provide more detail and actionable data	• District Briefings with new data • Results Roundtables bring data to community groups • High School-specific reports

Future evaluation efforts will focus on scale and sustainability

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The Road Map Project

Education Northwest Reflections on Evaluating Collective Impact

- ✓ Be prepared to **adapt**…and then adapt again
- ✓ Formative evaluation requires significant **capacity-building work with the backbone organization** to be of greatest use
- ✓ Shared measurements systems need to be **complemented with more fine grained data collection efforts** to promote continuous improvement
- ✓ Be mindful of what **audience(s)** the evaluation is for

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The Road Map Project
Q&A

Mary Jean Ryan
Community Center
for Education Results

Christopher Mazzeo
Education Northwest

Hallie Preskill
FSG

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The Infant Mortality Initiative
Overview

Every year in the state of Missouri, approximately 600 babies do not live to see their first birthday.

Initiated by the Missouri Foundation for Health in 2013 with two sites:

St. Louis:

One organization serving as the backbone in a community with many other collective impact initiatives.

Bootheel:

Two organizations coming together in a new partnership to share the role of a backbone in a community with little prior experience with collective impact.

Supported by developmental evaluation from the beginning

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The Infant Mortality Initiative
Overview of the Developmental Evaluation Process

1 **Recognizing that DE looks different**

- Supports innovation and ongoing development of new approaches
- A great fit for collective impact in its early years, when the level of uncertainty is high

2 **Coaching for the Foundation**

- Twice monthly coaching calls
- Building understanding of the DE approach
- Developing specific learning skills

3 **Training and support for the Grantees**

- Building understanding of the DE approach
- Working together to understand what about their work is simple, complicated and complex

4 **Generating evaluation questions ongoing with the grantees**

- Exploring the types of questions DE can help answer
- Developing evaluation questions together
- Helping to answer the questions through data collection

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Learning Questions in St. Louis:

- How can **outside influences be harnessed** to develop the strategy in new ways?
- What is a **process and structure for engaging stakeholders**, including how to best stage the engagement and how to motivate participation?

Learning Questions in the Bootheel:

- What does the problem of infant mortality look like **from the perspective of different stakeholders in our region**, including within the two different grantee organizations?
- How can the two backbones work together, **leveraging separate strengths** and taking on distinct, yet **complimentary, roles**?

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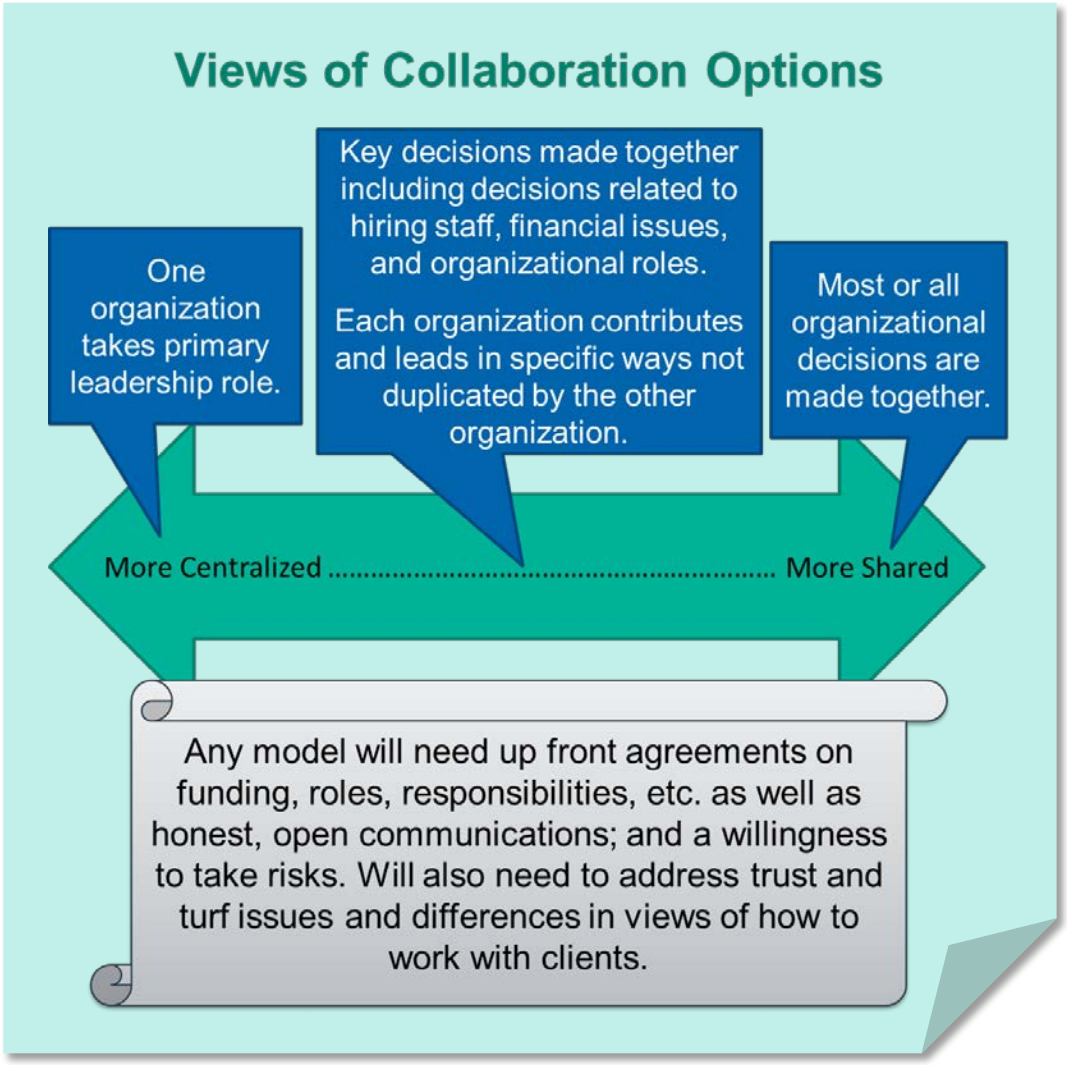
The Infant Mortality Initiative
Sample of the Findings



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The Infant Mortality Initiative
Reflections on Evaluating the Initiative

Bootheel Learning

- ✓ Understanding strengths and areas for growth in the relationships between the two backbone organizations

St. Louis Learning

- ✓ Understanding messaging and engagement strategies that will resonate with stakeholders

Foundation Learning

- ✓ Understanding when and how to use developmental evaluation in the context of collective impact and beyond

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The Infant Mortality Initiative
Reflections on Evaluating the Initiative

Learning about Developmental Evaluation

- ✓ There is a learning curve!
- ✓ The flexibility of developmental evaluation is critically important early in a collective impact initiative

Coaching Model

- ✓ Coaching helps build capacity, but sometimes the embedded, on the ground evaluator is needed
- ✓ Coaching calls with the Foundation have value at multiple levels

Future Plans

- ✓ Local embedded evaluators supported with coaching and training

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The Infant Mortality Initiative
Q&A

Kathleen Holmes
Missouri Foundation for Health

Jewlya Lynn
Spark Policy Institute

Hallie Preskill
FSG

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Full Q&A

Christopher Mazzeo
Education Northwest

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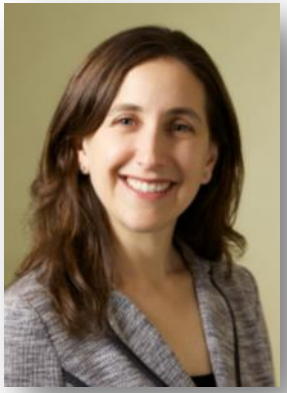

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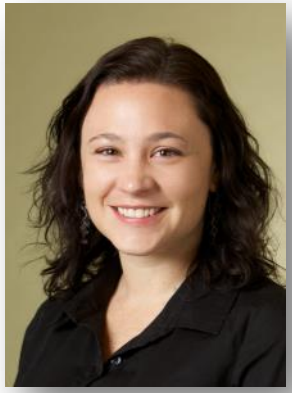

Marcie Parkhurst
FSG

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Goals: Create the Knowledge, Networks and Tools That Accelerate the Adoption and Increase the Rigor of Collective Impact

Activities

- Develop a **field-wide digital forum** to create, curate, and disseminate effective knowledge, tools and practices that support collective impact

- Support **communities of practice**, **convenings** and other events across the country that enable practitioners and funders of collective impact to **increase their effectiveness**
  - The first two communities of practice are for **funders** of collective impact, and collective impact **backbone organizations**

Partners

FSG

THE ASPEN INSTITUTE
Forum for Community Solutions

Co-Catalysts

COMMUNITY SOLUTIONS

the forum FOR YOUTH INVESTMENT

geo GRANTMAKERS FOR EFFECTIVE ORGANIZATIONS

TAMARACK An Institute for Community Engagement

United Way

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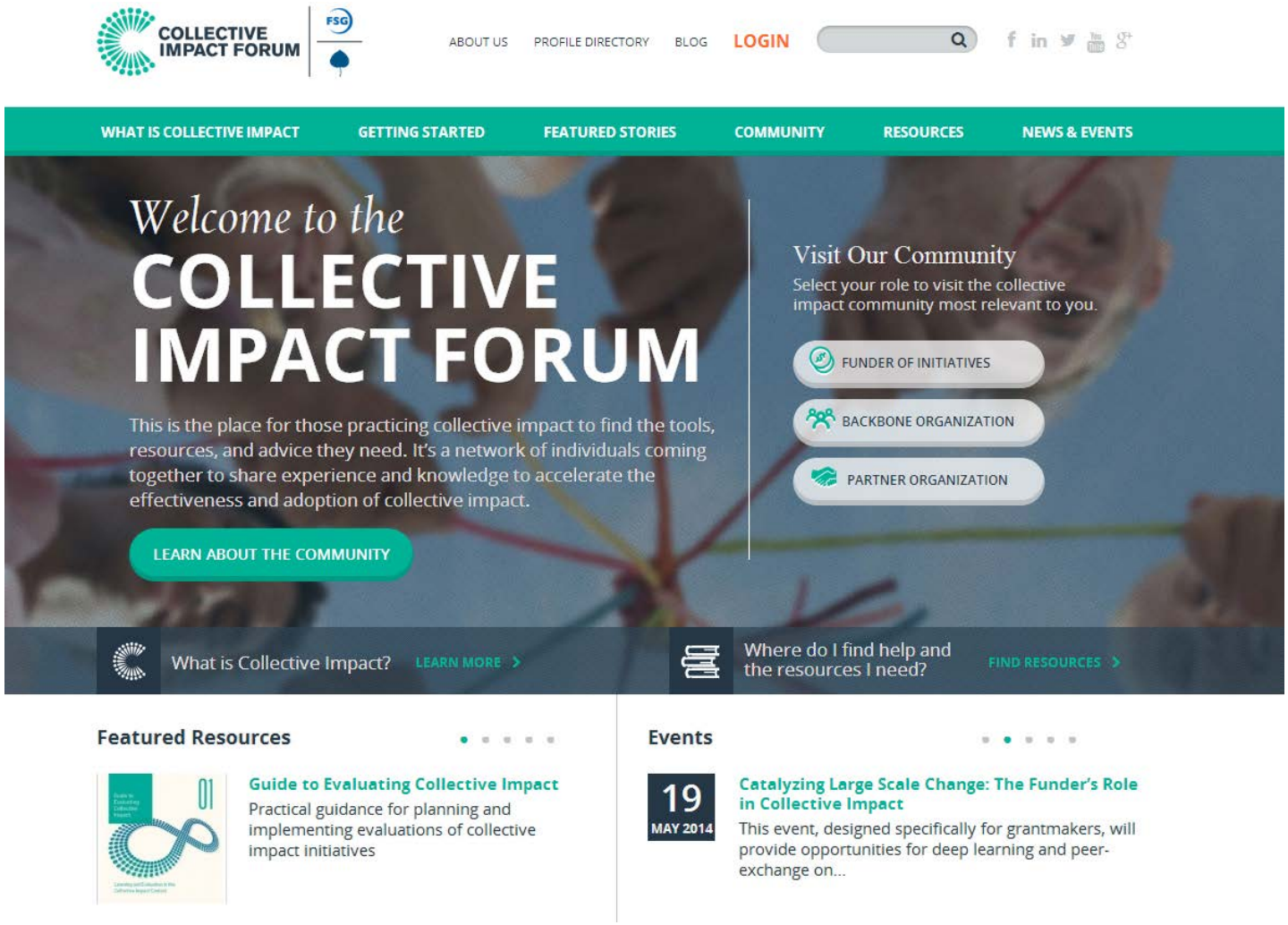
The Collective Impact Forum Will Fill In the Missing Pieces to Meet the Demand of the Field



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THANK YOU!

- Thank you for being part of the conversation today
- For additional guidance on this topic, see resources on the Collective Impact Forum website (collectiveimpactforum.org/resources/evaluating-collective-impact-webinar), and take a look at FSG's *Guide to Evaluating Collective Impact* on the Forum.

Goals of the Guide

1. **Illustrate the general process by which CI initiatives address complex problems**
2. **Explore the ways in which evaluation and learning support CI success**
3. **Answer common questions about planning for and implementing evaluation activities**

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