### Agenda for Today’s CI Funder COP Learning Call

#### Topics for Today’s Virtual Meeting

<table>
<thead>
<tr>
<th></th>
<th>Timing</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Introductions and Overview</strong></td>
<td>10 min</td>
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<tr>
<td><strong>Evaluating Collective Impact</strong></td>
<td>50 min</td>
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<tr>
<td>o Brief overview of the <em>Guide to Evaluating Collective Impact</em> with co-authors Hallie Preskill and Jennifer Splansky Juster</td>
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<tr>
<td>o Presentation and discussion with Julie Pehar and Seema Taneja on their “Measure Partnerships for Impact” tool</td>
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<tr>
<td>o Presentation and discussion with COP participants Jennifer Chubinski and Kelley Adcock of Interact for Health</td>
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<tr>
<td><strong>Next Steps and Small Group Discussion</strong></td>
<td>30 min</td>
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</tbody>
</table>
I. Introductions and Overview

II. Evaluating Collective Impact

III. Next Steps and Small Group Discussion
Goals of the Collective Impact Funder Community of Practice

• **Networking and building relationships** with other funders of collective impact

• **Learning about the strategies and nuances for funders engaging in collective impact**, and how to most effectively engage in and support collective impact

• **Improving the practice of grantmakers** as funders and partners in collective impact
Since May 2014, the CI Funder COP Has Offered Meetings and Peer Learning Calls on Topics Such as Community Engagement, Equity, Funder Alignment, and Leadership

- **Sept. 2014:** 30+ COP participants join first large group learning call
- **Jan. 2015:** Small group peer knowledge exchange calls begin
- **May 2015:** Second annual CI Funder Convening (New Orleans, LA)
- **Feb. 2016:** Fourth in-person COP meeting (DC)

### 2014
- **May 2014:** COP launches at first annual CI Funder Convening (Aspen, CO)

### 2015
- **Nov. 2014:** 40 attendees at first in-person COP meeting (Seattle, WA)
- **Feb. 2015:** Second in-person COP meeting (DC); 50+ orgs now in the COP
- **Oct. 2015:** Third in-person COP meeting (Chicago, IL)
51 Organizations Are Currently Participating in the CI Funder COP

<table>
<thead>
<tr>
<th>Confirmed Funder COP Participants (as of March 2016)</th>
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<tbody>
<tr>
<td>• Annie E. Casey Foundation</td>
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<td>• Aspen Community Foundation</td>
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<td>• Bill &amp; Melinda Gates Foundation</td>
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<td>• Blandin Foundation</td>
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<td>• Campbell Soup Company</td>
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<td>• Colorado Health Foundation</td>
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<td>• First 5 Monterey County</td>
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<td>• Ford Foundation</td>
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<td>• Foundations of East Chicago</td>
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<td>• GlaxoSmithKline</td>
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<td>• Greater Cincinnati Foundation</td>
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<td>• Greater Houston Community Foundation</td>
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<td>• Greater Texas Foundation</td>
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<td>• Gulf Coast Community Foundation</td>
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<td>• Healthcare Georgia Foundation</td>
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<td>• Health Foundation of Central Massachusetts</td>
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<td>• Health Foundation of South Florida</td>
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<td>• Hunt Alternatives / Demand Abolition</td>
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<td>• Institute of Mental Hygiene</td>
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<td>• Interact for Health</td>
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<td>• John T. Gorman Foundation</td>
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<td>• Lake Area United Way</td>
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<td>• Legacy Foundation</td>
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<td>• Lumina Foundation</td>
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<td>• Mat-Su Health Foundation</td>
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<td>• Missouri Foundation for Health</td>
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<td>• Monterey Peninsula Foundation</td>
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<td>• Northside Funders Group</td>
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<td>• Ontario Trillium Foundation</td>
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<td>• Robert R. McCormick Foundation</td>
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<td>• Santa Fe Community Foundation</td>
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<td>• SC Ministry Foundation</td>
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<td>• Social Venture Partners</td>
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<td>• Stuart Foundation</td>
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<tr>
<td>• The Community Foundation of Herkimer &amp; Oneida Counties</td>
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<td>• The Findlay-Hancock County Community Foundation</td>
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<td>• The HCA Foundation</td>
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<td>• The Lake County Community Foundation</td>
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<td>• The Rider-Pool Foundation</td>
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<td>• The Raikes Foundation</td>
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<td>• The Seattle Foundation</td>
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<td>• The Staten Island Foundation</td>
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<td>• The Whitman Institute</td>
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<td>• United Way of Greater Cincinnati</td>
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<td>• United Way of Hancock County</td>
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<td>• United Way of San Diego County</td>
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<td>• United Way of the Bay Area</td>
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<td>• United Way of the Greater Triangle</td>
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<td>• United Way of the Greater Lehigh Valley</td>
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<tr>
<td>• Venture Philanthropy Partners</td>
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<td>• William Caspar Graustein Memorial Fund</td>
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<td>• Wisconsin Partnership Program</td>
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</table>
COP Participants Are Geographically Diverse, But Also Have Clusters in Places like Chicago, Cincinnati, and Seattle

☆ = Headquarters of CI Funder COP Participant
I. Introductions and Overview
II. Evaluating Collective Impact
III. Next Steps and Small Group Discussion
Evaluating Collective Impact Requires a Mindset Shift for Many Funders and Practitioners

**Typical Focus of Program Evaluation**

- Assessing the impact of a specific intervention
- Evaluating effects and impact according to a *predetermined* set of outcomes
- Using logic models that imply cause and effect, and *linear* relationships
- Providing findings *at the end* of the evaluation

**Evaluating CI as a Complex Intervention**

- Assessing *multiple parts of the system*, including its components and connections
- Evaluating intended and unintended outcomes as they emerge over time
- Evaluating *non-linear and non-directional relationships* between the intervention and its outcomes
- Embedding *feedback* and *learning* through the evaluation
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
CI 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.
The Focus of Evaluation – and the Data Collection Methods Used – Will Evolve Throughout the Life of the Initiative

CI partners can use the framework to help focus their evaluation
An assessment of the CI initiative’s Intermediate Outcomes process could focus on changes in systems, such as funding flows or cultural norms.
**Example: Understanding Progress Toward Shifting Funding Flows**

**Learning Question:** To what extent, and in what ways are the flows of philanthropic and public funding shifting to support the goals of the CI initiative?

<table>
<thead>
<tr>
<th>Sample Outcomes</th>
<th>Sample Indicators</th>
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<tbody>
<tr>
<td>Philanthropic funding in the targeted issue area/system is increasingly aligned with the goals of the CI initiative</td>
<td>• Overall philanthropic funding for the targeted issue area or system has increased</td>
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<td>• New / Existing philanthropic resources are aligned towards evidence-based strategies in the targeted issue area/system</td>
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<td>• Philanthropic funding is increasingly designed to allow for program innovation and experimentation in the targeted issue area/system</td>
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<tr>
<td>Philanthropic and public funders leverage funding for the targeted issue area/system through partnerships and collaborative funding efforts</td>
<td>• Grantmakers participate in funding collaboratives to leverage resources toward the targeted issue area/system (as relevant)</td>
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<tr>
<td></td>
<td>• Philanthropic and public funders engage in public-private partnerships to leverage resources toward the targeted issue area/system</td>
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</table>
Key Takeaways

1. **Embed evaluation in the initiative’s DNA**

2. **Set reasonable expectations**

3. **Be thoughtful about your evaluation partners**
Measure Partnerships for Impact

Seema Taneja and Julie Pehar

March 15, 2016
What does measure partnerships for impact mean?

It means measuring the health of your partnership to understand its potential and ability to turn the curve on the partnership’s identified impact goals.
What is MPI?

- The MPI is a partnership evaluation tool that assesses the 5 CI domains and a Stakeholder Engagement domain.
- The tool also assesses Diversity, Equity and Inclusion through questions embedded throughout each domain.
Why Measure your Collaborative?

COLLECTIVE IMPACT

- Common Vision
- Shared Measurement
- Mutually reinforcing activities
- Continuous Communication
- Back-bone organization

MEASURE PARTNERSHIPS FOR IMPACT

IMPACT
Why Measure Partnerships?

• Measuring partnerships can derive data that is cross-cutting; irrespective of population priority

• Data can be used at a systems level to identify gaps in capacity, inform/support system wide training,

• It supports in assessing investment outcomes
How does a partnership assessment enhance partnerships?

- Identify strengths and opportunities and use evidence-based data to develop strategies to improve
- Provides real-time challenges and assets of the partnership
- Allows for funding gaps to be identified
- To be mindful of sustainability as the data speaks to specific funding areas
Examples of the kinds of visual graphics that help to tell the story of your partnerships capacity and growth

**Strengths**

78% felt the benefits of participating in this partnership exceed or greatly exceeds the drawbacks

All partners felt that the financial and in-kind resources were being used well or very well.

Everyone agrees that the collaborations encourages respect for differences, acceptance and freedom of expression

**Opportunities for Growth**

Some agreed that collaborative members are invested in achieving the goals, and some were neutral about this

Most agreed that meetings are well attended but some disagreed or were neutral

There was a mixed response to the leadership’s ability to combine the perspectives, resources and skills of the partners
What Can Funders Do To Enable Systems Change?

| Phase One                      | -Start the conversation and build capacity  
|                                | -Research, customize/develop, and administer a partnership assessment tool |
| Phase Two                     | -Require groups to do a semi-annual assessments and report results  
|                                | -Aggregate results and feed information back to agencies  
|                                | -Use learnings to drive decisions (i.e., capacity building, funding) |
| Phase Three                   | -Drive the process – standardize the use of a tool across the system  
|                                | -Tell the systems story – develop a CoP for partnership development  
|                                | -demonstrate IMPACT to population and desired social outcomes  
|                                | -hold trainings/webinars |
Continuous Learning

What Can Funders Do To Support

• Recognize that measuring your own capacity is a continual process and one that is concurrent with the longer term collective impact goals
• Make room for early discussion in the group about the importance of growing as a collaborative and why the group strength is the foundation to success on identified social issues

What Can Funded Agencies Do To Support

• Talk about all the areas the group wishes to build capacity on
• Ask the group what is important to them, as a partner in the group
• Protect time on every agenda to revisit and keep this discussion alive
• Celebrate the group willingness to look in the mirror and “fail forward”
What Can Funders Do To help Partnerships Reach Their Impact Goals?

- Dedicate resources to partnership assessment, analysis and continuous learning
- Recognize that measuring your own capacity is a continual process and one that is concurrent with the longer term collective impact goals
- Recognize that improving your internal capacity is the best way to reach your impact goals
- Reward your group for participating in the assessment and celebrate where you are doing well
- Dedicate a process to make acknowledge sector strengths and be intentional about a process to make improvements in building capacity
“Partnerships/Collaboratives rarely evaluate and gauge the gaps in its partnerships that can tell them if they are set up for success.

Data around indicators is one part of the story – the other part? Perceptions and experiences of partners. They tell us if people are engaged, believe in our ability as a collaborative, are confident that decisions are transparent and inclusive, and that leadership can indeed lead.”

(Pehar J., & Taneja S., 2015)
Thank You!

www.measurepartnershipsorforimpact.ca

- Read the full *Measure Partnership for Impact* Position Paper
- Access the [MPI Assessment Tool](#)
- Seema Taneja (647.390.6862; seema.taneja2@gmail.com)
  Julie Pehar (416-399-9295; julie@equityvision.ca)
EARLY STAGES: Evaluating Collective Impact on Health

Jennifer Chubinski, PhD
Kelley Adcock, MPH

March 15, 2016
Objectives

• Overview of the Greater Cincinnati Collective Impact on Health initiative
• Discussion of our approach to evaluating a collective impact initiative in its early stages and funder coordination
• Discussion of how we used a collaboration survey
• Next steps
Interact for Health

Interact for Health improves the health of people in the Cincinnati region by being a catalyst for health and wellness.

We accomplish our mission by promoting healthy living through grants, education, research and policy. We are a regional foundation that serves 20 counties in Ohio, Kentucky, and Indiana.

Our priority areas:

- **Health Promotion**: Healthy Eating, Active Living, Mental & Emotional Wellbeing, Healthy Choices about Substance Use, and Empowering Communities

- **Protecting the Healthcare Safety Net**
BACKGROUND: Collective Impact on Health
THE HEALTH COLLABORATIVE

COLLECTIVE IMPACT ON HEALTH

DATA-DRIVEN HEALTH IMPROVEMENT IN GREATER CINCINNATI
Where Did We Begin:
United Way’s Bold Goals For Our Region

- 85% of children will be prepared for kindergarten
- 85% of youth will graduate from high school
- 45% of adults will have an associate's degree or higher
- 90% of the labor force will be gainfully employed
- 70% of the community will report having excellent or very good health
- 95% of the community will report having a usual and appropriate place to go for medical care

The year the Bold Goals were created: 2011
Target year for the Bold Goals to be achieved: 2020

Today: 52%
Today: 82%
Building consensus across organizational boundaries using an experiential, evidence-based approach
Individuals and families will have the means, the opportunity, and the motivation to make choices that lead to healthier lives.

2020 Goals

2 measurable Bold Goals

- Health Status
- Access

3 Action Areas

- Healthy Behaviors
- Care Delivery
- Finance & Payment
APPROACH:
Evaluating Collective Impact
Why Evaluate?

- Provides context for and gives means to the outcomes – the how and why
- Optimizes and stimulates continuous learning and improvement
- Helps to guide the project toward a destination (guardrails)
- Uncovers what worked and what did not work – on both the organizational and initiative levels
- Informs decision-making and action
The (Messy) World of Collective Impact

- Complex environments and ecosystems
- Bringing together diverse stakeholders with different ideas of success
- Outcomes often take a long time to see progress
What’s different about Collective Impact Evaluation?

- Must be comfortable with uncertainty and ambiguity
- Needs to be iterative, flexible, and evolve based on how the initiative changes
- Context and collaboration matter

The Goal: “To provide CI partners with the specific information they need at a given point in time in order to understand their initiative’s effectiveness and make well-informed decisions about its strategy and activities.”

The Goal is Not: “To explore everything.”
Early Years: What Needs to Happen?
Funder Coordination

If funders of the same collective impact initiative coordinated our expectations, evaluation, and reporting, how would that help to support and drive the initiative forward?
Learning & Evaluation Template

- Tailored a template used locally to evaluate collective impact initiatives
- Focuses on the early stages
- Examines organizational-level goals and in what ways the initiative is designed and implemented to incorporate the five core conditions
- Used to facilitate ongoing conversations within the backbone, key stakeholders, and funders
- Future: Incorporate initiative-level measures
## Organization-Level Priority Goals

<table>
<thead>
<tr>
<th>Organization-Level Priority Goal</th>
<th>To be completed at beginning of year</th>
<th>To be completed at end of year</th>
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</thead>
<tbody>
<tr>
<td>Strategies &amp; Activities (What do you need to do to make progress on this goal?)</td>
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<tr>
<td>Documentation or Deliverable (How will you know the strategy or activity occurred or is complete?)</td>
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<tr>
<td>Target Date (When will the strategy or activity occur or be completed?)</td>
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<tr>
<td>Responsible (Who is responsible for this strategy or activity?)</td>
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<tr>
<td>Progress Made: What happened?</td>
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<tr>
<td>Relevant Context (challenges faced or contributing success factors)</td>
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<tr>
<td>Progress Self-Rating</td>
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### Backbone Infrastructure
- Goal #1
- | | |

### Common Agenda
- Goal #1
- | | |

### Shared Measurement
- Goal #1
- | | |

### Mutually Reinforcing Activities
- Goal #1
- | | |

### Continuous Communication
- Goal #1
- | | |

### Sustainability
- Goal #1
- | | |

Tailored from template developed by the Greater Cincinnati Foundation & FSG
ASSESSING COLLABORATION: Wilder Collaboration Factors Inventory
Collaboration Survey Overview

• Goals:
  • To assess key factors that influence the success of collaborations
  • To assess the strengths, challenges, and areas of opportunity of this collaboration
• Adapted from the *Wilder Collaboration Factors Inventory*
• Added qualitative questions about what is working well and what can be improved

## Wilder Collaboration Factors Inventory Snapshot

<table>
<thead>
<tr>
<th>Collaboration Factor</th>
<th>Description</th>
<th>Responses</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Established informal relationships and communication links</strong></td>
<td>29. Communication among the people in this collaborative group happens both at formal meetings and in informal ways.</td>
<td>1 2 3 4 5</td>
</tr>
<tr>
<td></td>
<td>30. I personally have informal conversations about the project with others who are involved in this collaborative group.</td>
<td>1 2 3 4 5</td>
</tr>
<tr>
<td><strong>Concrete, attainable goals and objectives</strong></td>
<td>31. I have a clear understanding of what our collaboration is trying to accomplish.</td>
<td>1 2 3 4 5</td>
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<tr>
<td></td>
<td>32. People in our collaborative group know and understand our goals.</td>
<td>1 2 3 4 5</td>
</tr>
<tr>
<td></td>
<td>33. People in our collaborative group have established reasonable goals.</td>
<td>1 2 3 4 5</td>
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<tr>
<td><strong>Shared vision</strong></td>
<td>34. The people in this collaborative group are dedicated to the idea that we can make this project work.</td>
<td>1 2 3 4 5</td>
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<tr>
<td></td>
<td>35. My ideas about what we want to accomplish with this collaboration seem to be the same as the ideas of others.</td>
<td>1 2 3 4 5</td>
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<tr>
<td><strong>Unique purpose</strong></td>
<td>36. What we are trying to accomplish with our collaborative project would be difficult for any single organization to accomplish by itself.</td>
<td>1 2 3 4 5</td>
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<tr>
<td></td>
<td>37. No other organization in the community is trying to do exactly what we are trying to do.</td>
<td>1 2 3 4 5</td>
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</table>
Reflection & Learning Conversation with Steering Committee

- How do we draw on our strengths to sustain this collaboration?
- What steps can we take to build in the areas where this collaboration lacks?
- What role do you play in supporting and championing this collaboration? What are you going to do differently?
Results & Future Use of Survey

- Collaboration Survey and Steering Committee Discussion:
  - Led to small changes made by the backbone
  - Informed the structure and content of the Annual Learning and Evaluation Template

- Future:
  - Adapt and use survey with additional stakeholders that are part of the collective impact initiative (e.g. action teams/work groups, steering committee, community stakeholders, etc.)
NEXT STEPS
References


Preskill H., Gopal, S. FSG. *Evaluating Complexity: Propositions for Improving Practice*.

Contact Us

Jennifer Chubinski, PhD, Vice President, Innovation & Learning
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Kelley Adcock, MPH, Evaluation & Research Associate
kadcock@interactforhealth.org

Thank you!
I. Introductions and Overview

II. Evaluating Collective Impact

III. Next Steps and Small Group Discussion
Our Next Call in April Will Continue the Discussion on the Ecocycle Framework for Sustaining Momentum

April 2016 Small Group Peer Knowledge Exchange

- **When:** Tuesday, April 26, 1-2pm EST
- **Topic:** Applying the “ecocycle framework” at different stages of collective impact initiatives (building on our February 2016 in-person meeting)

May 2016 Large Group Learning Call

- **When:** Date TBD (will poll for availability soon)
- **Topic:** When and how to disaggregate data, and how to have a conversation about the data once you’ve gathered it

June 2016 Collective Impact Funder Convening

- **When:** June 6-8, Seattle, WA (see next slide for more details)
Catalyzing Large Scale Change: The Funder's Role in Collective Impact
Seattle | June 6 - 8, 2016

- Third annual convening for those who are funding collective impact initiatives
- Opportunities for in-depth learning and peer-exchange with 300 funders
- Joint discussions with experienced backbone leaders and other community partners
- 20+ sessions on capacity building, community engagement, equity, leadership, learning and evaluation, and aligning initiatives

If you haven’t yet registered, please sign up soon to confirm your spot
We Invite You to Join Sub-Group Calls by Stage of Collective Impact Investment: Early, Mid, and Late

For the rest of our time, please join 1 of 3 conference lines, by stage:

1. **Early Stages:** In process of developing our collective impact initiative (e.g., we are beginning to explore different strategies and activities)

   - Use this existing conference call line
   - Facilitator: Robert Albright
   - Dial this line: 877-321-1680, access code: 36275-21896#

2. **Mid Stages:** In process of implementing our collective impact initiative (e.g., leadership and work groups are actively meeting)

   - Facilitator: Sheri Brady
   - Dial this line: 877-321-1680, access code: 83829-97449#

3. **Late Stages:** In process of refining our mature collective impact initiative (e.g., partners have invested significant time and resources into the initiative)

   - Facilitator: Jennifer Splansky Juster
   - Dial this line: 877-321-1680, access code: 83829-97449#

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**Discussion Questions for Each Group**

- See the PDF file sent out before the call with discussion prompts for each sub-group conversation by stage