

COLLECTIVE IDEAS TO COLLECTIVE IMPACT

A Guide to Data Collaboration in Communities



By Chelsea Farley and Meridith Polin with support from nFocus Solutions™

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Contents, Foreword, Executive Summary & Prologue



By Chelsea Farley and Meridith Polin

Prepared for nFocus Solutions



Taking Steps to Become More Data Driven

Over the past several decades, significant resources have been invested in the areas of education and positive youth development. However, in many areas of the country, dropout rates and other indicators of community health have remained persistently negative—especially for minority students and low-income communities. The overall lack of results is driving public and private funders to rethink traditional business models and become more outcomes driven and accountable. Given the demands of an increasingly competitive global economy, our nation simply cannot afford to fail another generation. Communities across the nation are discussing how they can best achieve goals related to youth and education.

An increasing number of communities are taking action. In this Guide, we shed light on two of them: The Building Bright Futures initiative in Omaha and Boston's city-wide youth collaborative. With the support of nFocus Solutions, both are improving the collection, aggregation and reporting of data. They are also making leaps and bounds when it comes to developing shared measurement and accountability systems across their collaborating agencies.

nFocus Solutions remains the only software provider in the nation addressing critical social issues through community-wide deployments that aggregate data at the organizational and community levels. Our years of experience led us to develop a process that ensures the successful achievement of community data management goals. But we know that our world-class support, solutions and staff can only be successful in places where local leaders are working together to ensure partner success. My hope is that community leaders will use this Guide and the associated tools to accelerate the accountability systems and ultimately produce the positive results that our nation truly deserves.

Ananda Roberts
President
nFocus Solutions



EXECUTIVE SUMMARY

A growing number of communities are convening representatives from diverse sectors, including government, philanthropy, schools and nonprofits, to tackle entrenched social problems. Often called “collective impact” initiatives, these efforts move beyond traditional collaboration—by clearly defining communitywide goals and performance measures and carefully coordinating program strategies—in an attempt to produce a collective impact that no single organization could achieve on its own.

By all accounts, the shared collection and use of data is central to collective impact efforts. But, to date, there has been little guidance for communities about how to make it happen. *Collective Ideas to Collective Impact: A Guide to Data Collaboration in Communities* taps the experience of two leading initiatives to provide concrete advice about planning, developing, launching and using a collaborative data system. Drawing on interviews with stakeholders in Boston and Omaha, as well as literature in the burgeoning fields of collective impact and shared measurement, the Guide offers step-by-step guidance for local officials, schools district leaders, nonprofit directors, funders and staff of intermediaries who are involved in collective impact efforts around the country. The Guide includes tips on:



Vision and Planning: Setting high-level goals, involving key stakeholders, developing a logic model or theory of change, deciding what to measure, etc.



Laying the Groundwork: Securing funding, highlighting potential benefits for partners, specifying roles and responsibilities, determining requirements for the data system, selecting a technology provider, etc.



Training: Communicating its importance, making it hands on, tailoring training to meet varying needs, providing ongoing training and support, etc.



Implementing a Shared Data Management System: Piloting the system, keeping partners engaged, ensuring accurate and complete data, communicating effectively, soliciting feedback and making adjustments, etc.



Making the Most of Your Data: Becoming truly data-driven, including reports and meetings that can help partners examine and act on data, at both the organization and collaborative level, etc.



Sustaining the Work: Generating stable, long-term support, stoking enthusiasm for the effort, evolving as needed, etc.

The guide also features a number of resources to help collaborating organizations accomplish this work, with additional resources available on our website. It is our hope that lessons learned in Boston, Omaha and other cities will strengthen future shared measurement efforts and, in the end, produce better results for children, families and communities.



PROLOGUE



In 2006, nearly half of the children in Omaha, Nebraska were living in poverty.ⁱ A close look at the city's education statistics exposed a sobering reality: if nothing changed, about half of these children would eventually become high school dropouts and only a fraction would go on to college.ⁱⁱ

A small group of local leaders, including Omaha Mayor Mike Fahey and philanthropist Susie Buffett, were spurred to action. Determined that children born into poverty should not be destined to stay there, the group began to meet regularly. As a result of their work, the Building Bright Futures collaborative was born.

Over the next 18 months, Building Bright Futures convened meetings throughout the city involving students, parents, teachers, school administrators, healthcare providers, employers, nonprofit organizations and religious leaders. In all, more than 1,500 community members representing more than 400 organizations participated in these discussions. Task forces were formed focusing on different aspects of the city's support system, with each working to identify the strengths and weaknesses of available programs. The result was the 2008 *Building Bright Futures Community Action Plan for Creating Educational Excellence and Equity*, which presented a "community-wide consensus on what needs to be done to dramatically improve academic performance [and] career awareness and create equality of opportunity within our educational system and community".ⁱⁱⁱ

Omaha had a plan, but it also had a problem. How would Building Bright Futures coordinate the efforts of so many different providers? How would it know what services were being delivered by each program and which youth were being served? How would it hold participating agencies accountable? And, crucially, how would it measure progress and success—how would it know if this new "concerted effort to change student outcomes" was actually making a difference?^{iv}

"Determined that children born into poverty should not be destined to stay there, the group began to meet regularly. As a result of their work, the Building Bright Futures collaborative was born."

INTRODUCTION

Using Data to Drive Collective Impact



INTRODUCTION

Using Data to Drive Collective Impact

While the particulars of Omaha’s story are unique, their situation is not at all unusual. In recent years, the number of communities attempting to tackle entrenched social problems by convening representatives from different sectors has exploded. The best of these are engaged in a new kind of community collaboration defined as “collective impact” by FSG’s John Kania and Mark Kramer in their widely read article published in the *Stanford Social Innovation Review*. These collective impact initiatives move beyond traditional partnership models—developing a centralized infrastructure with dedicated staff and “a structured process that leads to a common agenda, shared measurement, continuous communication and mutually reinforcing activities among all participants.” In short, they embrace a “single set of goals, measured in the same way” and work together, over a sustained period of time, to achieve a “collective impact” that no single organization could achieve on its own.^v

Collective Impact Gains Momentum

Collective impact initiatives have taken root across the country. These include Believe 2 Become in Grand Rapids, Michigan; Alignment Nashville; Community Partnership for Families of San Joaquin County; Parramore Kidz Zone in Orlando, Florida; Operation: Safe Community in Memphis, Tennessee; and a variety of community collaboratives associated with the Forum for Youth Investment’s Ready by 21 initiative. United Ways are also facilitating these kinds of multi-agency partnerships in communities like Winston-Salem, NC. In fact, a recent report by the White House Council on Community Solutions identified “at least 80 to 100 [active] collaboratives across the country” and “another

500 in planning or early implementation stages.”^{viii}

Some of the growth of the collective impact field has been fueled by interest from funders. National foundations like the Robert Wood Johnson Foundation, the Edna McConnell Clark Foundation and the Bill and Melinda Gates Foundation have invested millions of dollars in intensive community collaborations. Federal programs, including the Social Innovation Fund, the Department of Education’s Promise Neighborhoods and the Department of Housing and Urban Development’s Choice Neighborhoods, have also provided much-needed support for collaborative efforts.

As these initiatives have started to produce results—improving test scores, graduation rates,

What Is Collective Impact?

Collective impact initiatives are diverse, but researchers have identified a set of common elements, including:

- Shared vision/goals/agenda
- Engaged stakeholders from across sectors, including government, philanthropy, business, nonprofits and community members
- Long-term commitment—collective impact takes time
- Shared measurement and accountability
- Collaborative, “mutually reinforcing” strategies/ services
- A coordinated infrastructure or “backbone organization”

(Drawn from the work of Chris Kingsley for the National League of Cities, John Kania and Mark Kramer of FSG, and Michele Jolin, Paul Schmitz and Willa Seldon for the White House Council for Community Solutions.)

Why Invest in Shared Measurement?

Shared measurement allows collaborating agencies to:

- Pinpoint needs in the community
- Allocate and align resources to meet needs more efficiently
- Focus agencies' attention and effort on key goals and outcomes
- Ensure accountability among collaborating partners
- Adjust and enhance programs as needed
- Communicate results
- Assess impact
- Fundraise more successfully
- Boost outcomes/make a measureable difference in the community

and college enrollment and reducing violence and crime—more and more funders and policymakers have begun to place bets on collective impact strategies. The White House Council on Community Solutions report concluded that this “new kind of community collaborative... offers enormous promise to bring about broader, more lasting change across the nation.” The Aspen Institute is now building on the Council’s work, with support from a remarkable list of foundations (the Rockefeller Foundation, Bloomberg Philanthropies, the John S. and James L. Knight Foundation and the Annie E. Casey Foundation, among others). Aspen’s Opportunity Youth Incentive Fund will provide grants of up to \$500,000 to 10 or more collaborative efforts designed to “achieve better outcomes for disconnected youth.”^{viii}

The Role of Shared Measurement

By all accounts, the shared collection and use of data is central to collective impact efforts. Kania and Kramer pinpointed shared measurement systems as one of the key elements of strong collective impact initiatives, writing that: “Agreement on a common agenda is illusory without agreement on the ways success will be measured and reported.” Likewise, when the White House Council on Community Solutions and Bridgespan worked together to “identify the most effective needle-moving collaboratives” they determined that in the most successful initiatives “data is central to collaborative work and is the guiding element for collaborative decision-making.” These initiatives use “shared data to set the agenda and improve over time.”^x

Despite the widespread agreement that shared measurement is essential to collective impact ef-

orts, there has to date been little guidance for communities about how to make it happen. Many of the stakeholders who are leading collaboratives around the country express confusion and anxiety about this aspect of their work. “How do we select a system for collecting and reporting data at a community level?” “How do we get people to use the system and enter data consistently?” “What data should we collect?” and “Where do we even start?”

Initiatives that have been at the forefront of the collective impact movement have had to invent their own answers to these questions. They faced the challenge of envisioning, developing and implementing an approach to shared measurement without a clear model for how to do it. But, having made the upfront investment, these cities are beginning to reap the benefits that shared measurement can deliver, including better coordinated services, increased accountability and the capacity to examine and work together to improve outcomes across an entire community. This Guide is designed to help more communities reap those benefits.

Documenting Lessons from Boston and Omaha

This Guide taps the experience of two leading initiatives to provide a roadmap for other communities. Designed for the local officials, schools district leaders, nonprofit directors, funders and staff of various intermediaries who are involved in collective impact initiatives around the country, the Guide provides step-by-step advice about how to create a successful, sustainable collaborative data system.

To develop the Guide, we took a close look at



two initiatives, both nationally recognized for their work to implement data management systems at a large scale: The Building Bright Futures initiative in Omaha, and Boston's citywide youth collaborative, which includes the Boston Center for Youth and Families, Boston After School and Beyond and Boston About Results. These communities both work with nFocus Solutions to collect, aggregate and report data, and both have made impressive strides in developing shared measurement and accountability systems across their collaborating agencies.

We interviewed 22 people from the two initiatives, examined their documents and reviewed available literature in the burgeoning field of collective impact and shared measurement. Drawing on Boston and Omaha's experience, as well as the findings and insights of other recent reports, the Guide lays out strategies for planning, developing, launching and using a collective data system. It includes:

- **Vision and Planning:** Setting high-level goals, involving key stakeholders, developing a logic model or theory of change, deciding what to measure, etc.
- **Laying the Groundwork:** Securing funding, highlighting potential benefits for partners, specifying roles and responsibilities, determining requirements for the data system, selecting a technology provider, etc.
- **Training:** Communicating its importance, making it hands on, tailoring training to meet varying needs, providing ongoing training and support, etc.
- **Implementing a Shared Data Management System:** Piloting the system, keeping partners engaged, ensuring accurate and complete data, communicating effectively, soliciting feedback and making adjustments, etc.
- **Making the Most of Your Data:** Becoming truly data-driven, including reports and meetings that can help partners examine and act on data at both the organization and collaborative levels, etc.
- **Sustaining the Work:** Generating stable,

long-term support, stoking enthusiasm for the effort, evolving as needed, etc.

We have also compiled a set of concrete resources/tools to help collaborating organizations accomplish this work. In the back of the guide, you will find:

- **Selecting a Technology Provider** – a scoring template to help data collaboratives identify an appropriate technology provider, including various possible requirements for a shared data management system.
- **Data Collaborative Readiness Assessment** – a tool to help gauge your readiness to launch a data collaborative.



You can download additional tools from the website at nfocus.com.



How Does Performance Management Across Agencies/Sites Differ from Performance Management within a Single Organization?

PERFORMANCE MANAGEMENT WITHIN A SINGLE ORGANIZATION:

Free to determine which data to collect and how to define indicators.

System has to work in one organizational environment.

Costs are absorbed by one organization/covered in one budget.

Have direct control over staff. Management can assign roles and responsibilities. Ensuring accountability for data entry and promoting data-driven decision-making is relatively straightforward.

Free to select strategies to implement in response to data.

PERFORMANCE MANAGEMENT ACROSS AGENCIES/SITES:

Need to reach consensus about which data to collect and how to define indicators.

System has to work in multiple settings with different technology platforms (for example hardware, software, networking, etc.), varying levels of experience and staff capacity/availability.

Costs spread across organizations, with expenses integrated into multiple budgets.

An intermediary may provide overall leadership, but it generally does not have direct control over the majority of staff using the system. Partners need to agree on processes for determining if organizations are meeting their goals and what happens if they do not.

May need to negotiate about interpretations of the data and achieve consensus about how to respond.

BENEFITS OF A COLLABORATIVE APPROACH:

Common definitions of indicators make it possible to measure progress in a consistent way and put partners on the same page about expected results.

Shared measurement work can build partner organizations' capacities. More advanced partners can mentor those with less experience.

Costs may be more manageable for each collaborating agency. Shared measurement also promotes efficiencies that save money in the long term.

Agencies can be held accountable for their work, individually and collectively. Agencies can collaborate to improve results, sharing insights about the data and effective programming.

Agencies can work together to implement coordinated, mutually reinforcing strategies that are more likely to have a positive impact for individual participants and the entire community.



Vision & Planning



Vision and Planning

Stakeholders in budding community impact initiatives have a general idea of what they want to accomplish. Perhaps a particular statistic has generated attention (e.g., rising crime rates or worrisome standardized test scores). Perhaps a local leader has rallied the community around an enduring problem (e.g., a neighborhood badly in need of revitalization). Whatever the spark, people come to the table interested in working together to address a pressing need.

But moving from a general sense of urgency about an issue toward a shared definition of the problem and vision for how to solve it can be challenging. Bridgespan wrote that individual nonprofits often “have the hardest time with the first part of the process, defining the impact they intend to achieve and articulating exactly what needs to happen [and why] in order to achieve that impact.”^{xi} This is even more true when multiple organizations come together. A thoughtful process is needed to help the members of a data collaborative clearly define their goals and strategies.

These early conversations are essential, not just for planning the mechanics of the initiative, but for developing relationships that will engender cooperation and problem-solving over the long haul. As one leader in Omaha told us, “Before you begin this work, you have to foster relationships—focus on why you want to do it, how you do this and that you are a partner that will help achieve a common good.”

Start Conversations with the Right People Early

In Omaha: Building Bright Futures engaged a broad cross-section of the community in discussing the challenges faced by local youth. They were equally deliberate in their approach to developing a shared measurement system for the initiative. Several key partners began a dialogue about what they hoped to get from a collaborative data effort. The Sherwood Foundation, which was founded by the Buffett family and was one of Omaha’s largest philanthropic players, wanted a clearer picture of the impact its investments were having. Avenue Scholars Foundation, a local nonprofit that guides students through high school

and into post-secondary education and careers, was interested in “merging data” to coordinate services and track youth and young adult outcomes at the community level. The local United Way, the Boys & Girls Club of the Midlands and a variety of other nonprofits also participated in early conversations and helped push the collaborative data effort forward.

The ability to assess and advance their collective work was not the only goal for these partners; they also hoped to streamline “asks” being made to local school districts and other government agencies. The burden of these asks had become heavy and duplicative—with various nonprofits across Omaha asking school districts for the same or similar information at different times and in different forms. A shared data system held the promise of creating efficiencies for all the partners involved, most notably for the school districts.

In Boston: The city government had launched an initiative called Boston About Results, which tracks 2,000 performance measures across 45 city departments, in a broad effort to improve accountability and performance. One of those departments is the Boston Centers for Youth and Families (BCYF), which had a long history of “pen and paper” record keeping. In our conversations, Boston About Results staff acknowledged that counting “whether potholes got fixed” was much simpler than figuring out how to assess the city’s youth services. Nevertheless, in 2007 and with a new executive director in place, BCYF set out to develop a shared data system for its 46 centers scattered throughout the city. This was the first step toward a more data-driven approach to the city’s services for youth.



The next significant step was led by Boston After School and Beyond, the city's out-of-school-time intermediary, which was using nFocus Solutions software to develop BOSTONavigator—a database where families, schools and program staff could learn about out-of-school-time (OST) opportunities throughout the city. The database grew to include some 1,700 OST programs.

Many of the providers participating in BOSTONavigator were increasingly interested in some sort of “integrated data” effort that could capture not just program information but also data about individual youth's participation and outcomes. Today, Boston After School and Beyond has begun working with several large OST providers, including the Boys and Girls Clubs of Boston, BELL and Citizen Schools, to plan for an ambitious shared data system that could—among other things—facilitate referrals and track participation data and student outcomes across the city.

It would have been easy for the Boston initiatives to develop on completely separate tracks, but city leaders recognized the opportunity for collaboration. BCYF and Boston After School and Beyond were both working to create centralized data systems that would capture important information about services delivered to the city's youth and, eventually, about youth outcomes. Stakeholders worked together to ensure that their efforts would ultimately converge in a citywide shared data initiative.

Define Your Goals Clearly

Well before a collaborative looks at software packages or considers what data to collect, it is vital for the partners to reach agreement about what it is they're working to achieve in their community. What long-term outcomes does the collaborative hope to impact? The answer to this question provides the foundation for everything that follows.

Building Bright Futures started with broad concerns about the “status of youth” in the Oma-

TOOL



To gauge your readiness to launch a shared measurement effort, use the **Data Collaborative Readiness Assessment** at the end of the Guide; it is also available on our website: nfocus.com.

ha metropolitan area but eventually zeroed in on several priority outcomes, including:

- Improving academic achievement
- Increasing the number of students who graduate from high school prepared for work or postsecondary education
- Providing postsecondary educational opportunities to economically disadvantaged high school graduates

Like many city agencies around the country, BCYF has a broad mission—in this case, to “enhance the quality of life for Boston residents by supporting children, youth and families through a wide range of programs and services.”^{xii} For decades, BCYF centers have provided “a range of affordable programs, including preschool, school-aged and adult education, family literacy, youth employment, violence prevention, senior activities, recreation and enrichment.”^{xiii} Given this broad swath of programming and varying goals, BCYF and Boston About Results decided that initial data collection should focus on understanding how people were using the centers: which centers and programs were being attended and which weren't? How many people were being served? Eventually, BCYF would identify and track priority outcomes, but a clear picture of usage was seen as an important first step.^{xiv}

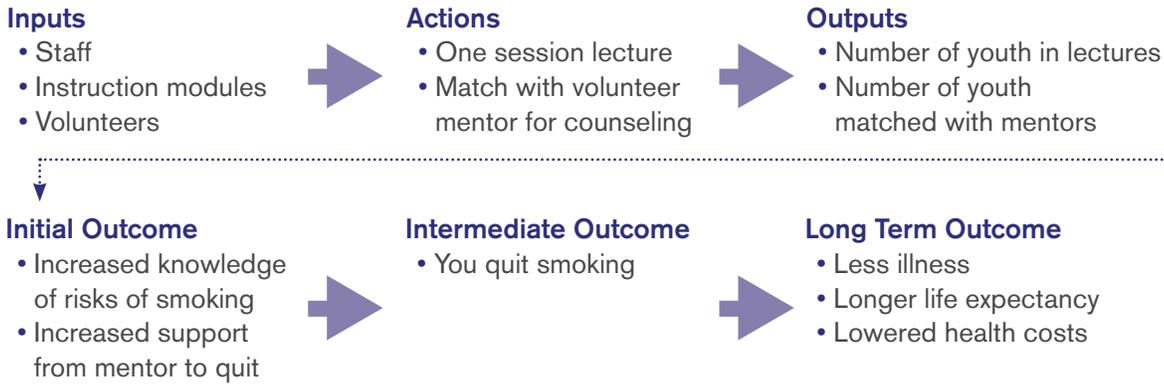
Develop a Sound, Evidence-Based Theory of Change and/or Logic Model

When a collaborative is clear about its long-term goals, the next step is to develop a theory of change or logic model. This theory or model will outline the resources and activities that are expected to produce the desired results as well as short- and long-term outcomes of interest. As shown in the example below, a logic model depicts, in flowchart fashion, an initiative's inputs (i.e., resources like staffing, funds, equipment, etc.), activities (e.g., mentoring, tutoring, field trips, classes), outputs (e.g., number of mentoring matches or meetings, hours of tutoring, number of field trips, number of classes), and outcomes (i.e., the changes expected in participants—both immediately and over time).

In Omaha, stakeholders started by simply look-



Sample Logic Model for a Teen Smoking Cessation Program^{xiv}



ing at their long-term goals and then thinking in more detail about what it would take, throughout a child's life, to achieve those goals. They envisioned a pipeline to success, which included early childhood services (to improve kindergarten readiness), school-based health centers (to keep students healthy and boost attendance), mentoring, after-school and tutoring programs (to provide strong support for students, both academically and personally) and a number of other components.

As much as possible, an initiative's theory of change or logic model should be grounded in research about effective program strategies. There is a rich research base to draw on in most fields, and it makes sense for new collaboratives to start by asking what has worked in other places. nFocus Solutions strongly encourages collaboratives to identify strategies with a clear track record of success and then focus on implementing these strategies (and measuring their results) well.

Decide What to Measure

A strong theory of change or logic model will point to the key indicators that a collaborative should measure. Most collaboratives end up collecting a range of data for various purposes:

- Information about individual *program participants* will help determine who the collaborative is reaching unduplicated counts of participants across a collaborative are only possible via a shared data system

- Information about (*the services* received the location) frequency, intensity and duration of participation is critical for accountability and resource allocation; it can also be used to assess how people move from program to program and which constellations of services are associated with better outcomes
- Indicators of *program quality* can be used to help interpret outcome data and ultimately improve services and results
- *Interim outcome data* can be used to assess whether participants are on track toward success, (e.g., attendance, grades, standardized test scores, etc.)
- *Long-term outcome data* can, over time, illuminate whether the collaborative is achieving its goals, (e.g. higher graduation rates and college/career readiness)

Tough decisions about which data to collect are sometimes necessary. Trying to gather too much data is a common mistake. As one leader in Boston put it, "You cannot collect everything under the sun and you don't need to.... If the youth development field is telling us what to do, research wise, that is where we should focus efforts."

It is helpful to look at the information that individual providers are already tracking. To what extent can this data be used for the collaborative's



“A shared data system cannot replace the roles of academic researchers and third party evaluators, whose rigorous studies remain necessary to understanding why the reported results are being achieved and to what they may be attributable. Instead, the systems offer an important complement to more rigorous evaluation studies by promoting ongoing learning in timely and cost-effective ways.”

— Mark Kramer, Marcie Parkhurst, and Lalitha Vaidyanathan,
Breakthroughs in Shared Measurement and Social Impact, 2009

purposes? Are providers defining key indicators in the same way? As noted by Public/Private Ventures and Child Trends in their 2012 report, “One challenge to pooling and assessing data from multiple agencies is that they may define common indicators very differently. Are participants ‘enrolled’ when they fill out a form with their basic information or only after they have substantively participated (e.g., for one class)? Has a student actually ‘attended’ an afterschool session if he or she stays only for the first 15 minutes?... Collaborating agencies should be very explicit about how they want to define key terms and make sure that staff who are entering data fully understand these definitions.”^{xv}

Funders can play a critical role in this process by working together to align their reporting requirements and definitions of key outcomes. This has the potential to reduce a substantial burden for service providers, who often have to report data to various funders in an array of formats.

There are practical tools to help members of a collaborative adopt shared definitions. One is a detailed data dictionary. The one used in Omaha covers more than 100 indicators/fields for participant data alone. This may seem extraordinary, and not every collaborative will need a dictionary of this length. But recording definitions with as much detail as possible will mean fewer questions when it comes time to enter and report data.

Collaboratives can also benefit from developing a common application form, as both Boston and Omaha did. A common application provides a starting point to ensure that all partners “talk” to

participants in the same language and ask them for the same data, defined the same way, at the outset of their participation. It facilitates agreement about how to categorize race, age groupings and income ranges, for example. Sorting these definitions out at the beginning means the collaborative will not have to recategorize data when it comes into a shared environment. In Boston, staff at some of the BCYF centers were hesitant at first about sections of the form that involved “sensitive” information (like family income). But the initiative’s leadership was able to overcome the initial resistance by emphasizing that this type of data helps coordinate and improve services across the community.

The best decisions about which data to gather often come from frank conversations about what questions the collaborative will eventually need to answer with its data: Who are we reaching? Are they from the neighborhoods we’re targeting? What services have been provided? Are we making a difference for participants, and for the community as a whole? Thinking ahead to the story you want your data to tell can be challenging at the beginning of an initiative, but it’s a very useful exercise.

TOOL



Download excerpts from **Omaha’s Data Dictionary** on our website: nfocus.com



Laying the Groundwork



Laying the Groundwork

Once partners are in agreement about the overall goals for a collaborative data effort, a number of concrete steps can be taken to begin making that vision a reality. These include lining up resources, specifying roles and responsibilities, determining requirements for the data system and selecting a technology provider who can meet those needs. Stakeholders in Boston and Omaha agree that time and thought invested in these areas upfront pays dividends in the long term.

Secure Funding

One clear lesson emerging from both Omaha and Boston is the necessity of stable long-term funding to support a collaborative data effort.^{xvi} It is important to secure funding not only for the software, training and support, but also for the significant time that will be required—from all of the partners—to design, develop, launch, learn about and use the system. In practice, this generally means a core grant to the central coordinating entity, plus line items in partnering agencies' budgets to cover staff time and any other anticipated expenses.

Fortunately, increasing numbers of funders (both public and private) are interested in helping service providers improve their use of data. Plus, developing a shared data system for use by multiple agencies across a community can result in important savings when compared to a “go it alone” approach. Partners in Omaha noted the following opportunities for savings:

- Favorable volume pricing
- Sharing costs for the initial licensing fee and annual support and maintenance
- Sharing implementation costs
- Creating a community-wide group of users who can guide future development and provide support for one another

Decide Who Is Leading the Effort

Strong leadership is essential to a collaborative data effort. In Boston, the push to collect better

data came directly from the Mayor's office as part of the citywide effort to better align and use data. In Omaha, several important community organizations, including a local funder, came together to propel the effort forward. In essence, someone with authority—and generally someone with control over resources—needs to make the shared data effort a priority.

In addition to this senior leadership role, stakeholders in Boston and Omaha also noted the importance of leadership at other levels of the initiative: at the central coordinating organization/intermediary, at each partner agency and at the school district and/or city. In each place, there should be a strong leader who is committed to the data effort and empowered to make relevant decisions.

Highlight the Benefits for Partner Agencies

As a leader in Omaha told us, it is crucial to “determine and communicate the value-add to anyone you partner with—anyone who is going to be putting data into your system...You can't ask them to do more work without offering something in return.”

Incentives don't have to be financial. They could include training, streamlined processes, or the ability to provide better information to funders and donors. In Omaha, many organizations were drawn by the prospect of getting direct access to school district data. Similarly, for the Omaha public school district, the promise of no longer receiving multiple requests for data was appealing. Integrating data from school districts and nonprofits is complex, but it was a major part of how the partners originally envisioned the system. That



clarity has helped the collaborative work through challenges it encountered along the way.

Determine Roles and Responsibilities

Early, speculative conversations about a collaborative data effort eventually have to morph into clear commitments from participating agencies. It's important for everyone to understand and communicate not only what they hope to get out of the shared data system, but also what each agency is contributing and when. Omaha, for example, carved out very distinct roles for different members of the collaborative. Building Bright Futures would house the data collection system, while the Boys & Girls Club of the Midlands brought technical expertise and eventually headed up system implementation and training. The United Way would serve as the "backbone" organization, providing a home base for staff who would lead the collaborative data effort. The partners developed a "memoranda of understanding" outlining the agreed-upon roles and responsibilities of various organizations in clear terms.

In Boston, the development of the BCYF data system took place largely within that agency. But BOSTONavigator was designed to engage many diverse OST providers across the city. Boston After School and Beyond, which had strong ties to those providers, would house the system and hire staff to support its initial implementation, while each participating provider would be responsible for updating their information at regular intervals. The City of Boston provided funding, and teen staff of the Mayor's Youthline provided support to families and youth who called to inquire about what programs were available in their community.

In both cities, initiative leaders realized the importance of having at least one central dedicated staff person who is responsible for driving the collaborative data effort. Much of the work to design, launch and use the data system falls on people who have other responsibilities at their respective organizations (with collaborative data tasks added onto their already busy schedules). The

emerging literature on collective impact initiatives highlights the need for centralized infrastructure and staffing.^{xvii} This should include a point person who is accountable for keeping the shared data effort moving.

Assess Partners' Data Collection Capacities

Organizations come to a collaboration with varying degrees of technology experience. Sometimes basic hardware issues ("there's not enough memory on our machines"), networking problems ("our internet connection is unbearably slow!") or multiple data systems ("we have three funders who each require us to use a different system") can interfere with getting the shared data effort off the ground. Where possible, these problems should be anticipated and addressed during the planning process. As one staff member in Omaha noted: "There was a ton of variability of how [agencies] were collecting data and the extent to which they were using data, and for what purposes." This variability means some organizations will easily make the transition to using a shared data system, while others will need more support to ensure their technology infrastructure is ready to go.

Outline Your Requirements

A critical step for any data collaborative is reaching agreement about how the system will need to work on a day-to-day basis, and then using that understanding to develop a detailed list of system requirements. This necessitates clarity about the kind of data you plan to collect and who will be responsible for collecting it in addition to the needed functionality: What surveys and assessments will you use? What reports will you run? Will the system need to be integrated with other, preexisting systems?

TOOL



Download sample **Job Descriptions** for key roles in a data collaborative from our website: nfocus.com

"A critical step for any data collaborative is reaching agreement about how the system will need to work on a day-to-day basis, and then using that understanding to develop a detailed list of system requirements."



“For many collaboratives, selecting a technology provider is one of the more daunting parts of the process; it is also one of the most important decisions that a collaborative will make.”

A survey recently conducted by the National League of Cities (NLC) found that reporting capability and security and privacy of data were the two highest priorities for city leaders investing in shared data management systems, quickly followed by a customizable user interface, customer support and cost.^{xvii} Many collaboratives find that they need to be able to capture and report information from a variety of sources. Boston and Omaha both selected *Community Server*, an nFocus Solutions tool that makes this possible. Community Server aggregates data from other systems and can overlay community-specific information, such as Census data, crime statistics, juvenile justice data, student information, etc. This kind of tool is extremely valuable for initiatives working to achieve collective impact as it enables the integration and analysis of data from a multitude of sources, providing a comprehensive and accurate portrait of a community's needs and progress.

TOOL

 To assess partner needs and capacities, use the **Database Development Survey** available on our website: nfocus.com

Select a Technology Provider

For many collaboratives, selecting a technology provider is one of the more daunting parts of the process; it is also one of the most important decisions that a collaborative will make. As NLC has pointed out, the firm that a collaborative selects “serves not only as a technology provider but also as consultant to the many other tasks associated with creating a citywide system.” Working with a provider who meets your needs technically, and who is willing to engage with you as an enthusiastic and dedicated partner, will help ensure the success of your collaborative data effort. It is important to think of this as a partnership and not just a vendor relationship.

Omaha's approach to selecting a technology partner was impressively methodical. Their process included phone interviews with several companies and the solicitation of proposals, in-person presentations by finalists, extensive reference checks and reviews of demonstration software. The collaborative developed a well-conceived list of criteria for their system and a related scoring structure. In the end, 16 different members of the collaborative participated in reviewing and rating potential vendors. The careful process helped en-

Criteria for Selecting a Technology Provider

Omaha's evaluation of potential technology vendors covered a number of important areas, including:

- **Overall system requirements**, such as the look and feel of the user interface, the login process, ease of initial implementation, archiving requirements, overall ease of use and access to the system from any work station, as well as remote access on laptops, tablets, etc. (nFocus Solutions, for example, offers bar code scanners and mobile apps for remote sites)
- **Administration and security**, including administrator options, password protection and individual and group settings
- **Reporting capability**, including ease of access to reports, data exporting, customizable reports and format of reports (graphs, text, tablets, etc.)
- **Provider support**, including the stability of the company, professionalism, and willingness to provide customized solutions
- **Cost**, including the cost of support and upgrades



gender a strong sense of ownership and buy-in when nFocus Solutions was ultimately selected as the technology partner.

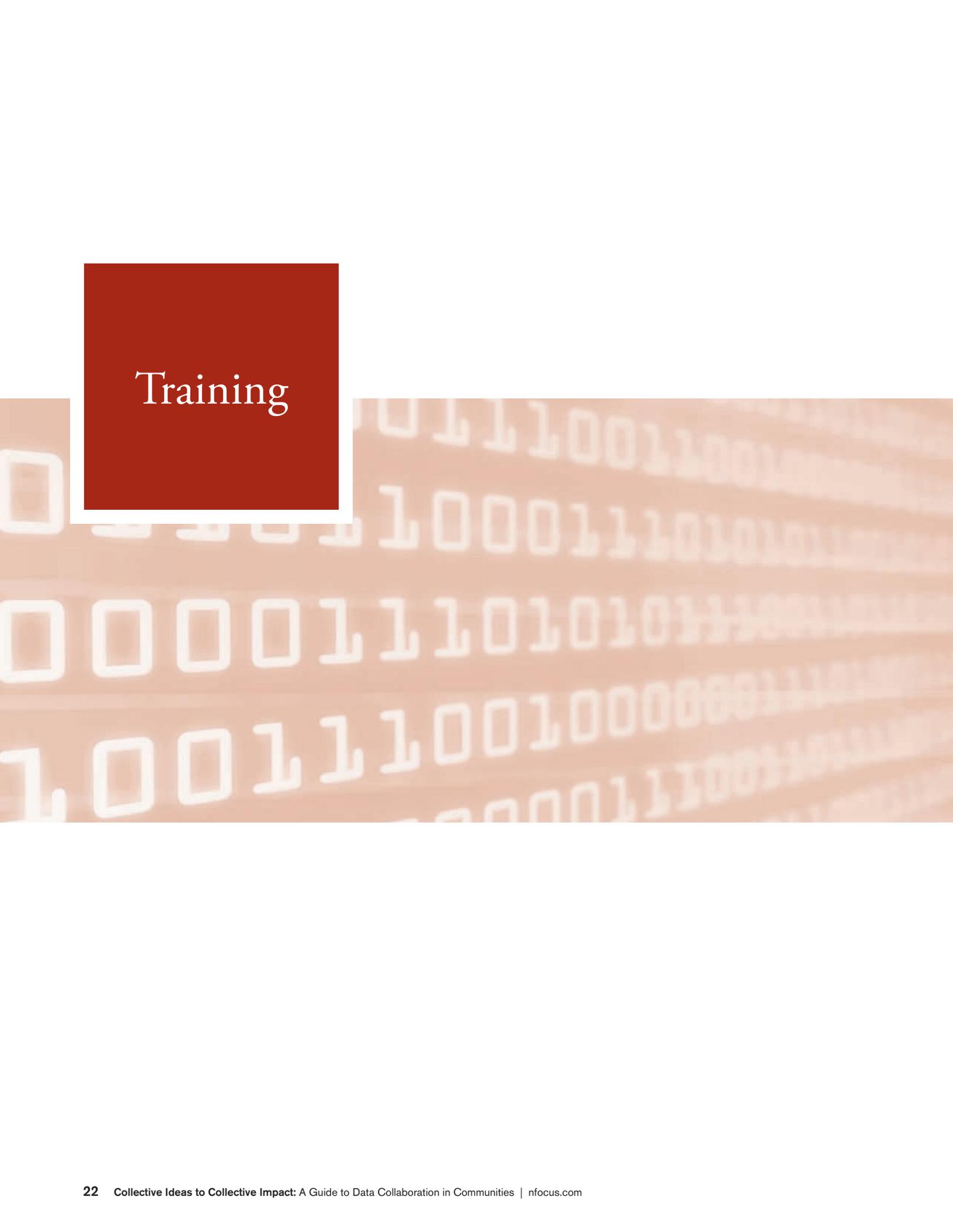
NLC's guide, *Building Management Information Systems to Coordinate Citywide Afterschool Programs*, provides excellent tools for identifying system requirements and comparing technology vendors, including a side-by-side comparison of features available in different software packages.

Develop an Implementation Plan

After a technology provider is selected, the collaborative essentially has a new partner. Together, you will develop a concrete plan for implementation that includes technical requirements, a schedule for system development, a training plan and an approach to piloting and rolling out the system. The technology provider should be willing to work hand-in-hand with members of the collaborative to develop solutions that help create the results that communities and partners want to achieve. The next two sections of the guide provide details about the training and system implementation phases.

TOOL

 A **Selecting a Technology Provider** scoring sheet, which outlines numerous possible requirements for a shared data system, is available at the end of this Guide or on our website: nfocus.com



Training



Training

Possibly the most important aspect of a shared data effort, one that will determine the quality of the data you collect and whether people actually use the information, is training on the system. Many collaboratives make the mistake of not investing enough in this area. To get the most out of training, we suggest the following:

Communicate the Importance of Training to Partners and Staff

Leaders (at both the collaborative and organization levels) need to be champions of training. If they are not intimately involved in training sessions themselves, they need to delegate oversight of training to someone who has the authority and the legitimacy to rally staff around learning to use the system. Time should be carved out of people's schedules to attend training sessions and practice using the system so it is clear this work is a high priority for participating organizations. Leaders should help staff understand why training and the larger data effort are important. Showing how the database may make staff's jobs easier or make their work more effective is a great way to get them engaged and excited about learning to use the system.

Use Different Training Modes

Trainings should be "live" and targeted to the needs and interests of your particular audience. While webinars can be effective for providing general overviews, presenting information on best practices or troubleshooting particular challenges, we have found that the most successful data collaboratives use live, in-person trainings (at least to start) that are specific to the database developed for the collaborative. Canned trainings often do not provide the context and specificity necessary to make the data system feel real for trainees. Omaha's approach to training worked well. The collaborative started with a webinar overview and then moved to a series of in-person trainings about progressively more complex aspects of the system. Some stakeholders in Boston reflected that they wished they had done more

in-person training at the beginning of their shared data effort: "Many folks thought you didn't need face to face, but you need to be aware of the various modes by which people learn and understand things.... The majority of people learn through face-to-face interactions." The Boston team has since adapted their training to include a variety of delivery methods.

Tailor Training to Meet Varying Needs

Frontline staff need intensive, hands-on training to help them feel comfortable entering data and generating reports. Many have had little or no experience with a data system. Trainings should be phased to help staff build skills over time with attention paid not just to technical features but also to the practical day-to-day realities of entering and using data. Early on, trainings should focus on basic tasks like data entry. Later trainings should help staff master the system's more advanced functions—how to run various reports, for example, and how to analyze and use the information these reports contain.

Training materials should be customized so they are relevant for participating providers. Some kinds of "database speak" (e.g., "active versus inactive participants") may need to be translated into terms that program staff can easily understand. A leader in Boston also emphasized the importance of practice and "sticking to it" as staff learn to use the system. "You can't break it! Play with the different reports, see how it can work for

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 Download a sample **Training Schedule** from our website: nfocus.com



“Collaboratives should find ways to institutionalize database expertise, so staff have someone to call when questions about the system arise.”

you. Make everyone at your site play with the system... so they can all get a sense of it.”

Keep Training Going

Training should not be conceived as a “one-shot” prelaunch activity. Experiences in Boston and Omaha both underscore the need for long-term training and support to help staff use the system effectively. Over the life of an initiative, there will inevitably be staff turnover; periodic trainings will bring new users up to speed. We also suggest documenting trainings through recorded webinars and developing detailed user manuals, which can be enormously helpful for staff who come in and cannot be trained right away or for those who may need “refreshers” on how to use the system. Collaboratives should find ways to institutionalize database expertise, so staff have someone to call when questions about the system arise. During our interviews in Boston and Omaha, stakeholders spoke highly of nFocus Solutions’ technical support—“Their team is ‘amazing!’, “Very responsive,” and “They will answer any question.” Strong support from the technology provider, during initial training and beyond, is clearly an important ingredient for success.



Implementing Your Shared Data System



Implementing Your Shared Data System

After extensive planning, deploying the system and beginning to collect data is an important milestone. In the weeks that precede a system “going live,” work is often happening at a robust pace and at multiple levels across the initiative. Frontline staff members are completing their initial training. Providers and school districts are finalizing procedures for sharing data, including the collection of signed consent forms. The technology provider is working to get the system in place and tested. These various moving pieces require strong coordination.

In the months and weeks that follow, partner organizations will integrate shared measurement work into their day-to-day operations, and the collaborative as a whole will establish processes for examining and analyzing data together. Members of the collaborative should meet regularly to assess how the data effort is going and make adjustments as necessary.

Conduct a Pilot

Both Omaha and Boston started with pilot projects and built out slowly. BCYF, for instance, selected a group of 10 sites to pilot its shared data system (called BosTrax). The sites were selected based on a variety of factors, including location, technological ability, the number of families they were serving and whether they had staff who were interested and engaged in collecting data. The pilot strengthened relationships among participating sites and developed an instant learning community. Of course, the experience also exposed weaknesses (e.g., problems with some organizations’ internet connections). This too was ultimately valuable because it enabled BCYF to provide better support when it eventually rolled out BosTrax to other centers.

As the leader of another shared data effort told us, “We worked with [agencies that] were most motivated first, the most forward thinking, that were ready to make the leap on performance management. We knew [the rest] would happen over time.”

Focus on Data Quality

Monitoring data quality is important, especially

at the beginning of a data collection effort when mistakes are common. It’s not unusual for there to be errors or inconsistencies in how data is being entered. (For example, should this cooking class be classified as “life skills” or “workforce development”? Was an annual salary entered in an hourly wage field? Is a participant considered dismissed from a program after several weeks of no shows?)

From the start, reports should be run as much to check the quality of the data as to begin tracking results. Monthly dashboards or other graphic displays of data can be used to identify problems and to animate conversations about improving data quality. Some initiatives compile “missing data memos” each month, highlighting gaps in information for required data fields. These memos can be sent to individual partner organizations or discussed in collaborative-wide meetings.

When data entry problems arise, it’s important to address them systematically in addition to correcting the specific error. Clarifications might be added to the data dictionary, for instance, and flagged for all users across the system. More training might be arranged to address a persistent problem.

Help Partners Stay on Task

One of the reasons that it’s so important to have clear expectations upfront is that, inevitably, some organizations will face challenges in their early use of a shared data system. Having everyone commit to a specific time table helps ensure accountability and keeps the overall data effort moving. Both Boston and Omaha gave

A Note about Longitudinal Data Collection

Certain pieces of data need to stay in your system once they're captured, but this can pose challenges, depending on how the data are entered and stored. One of the most commonly misreported data elements for students, for example, is grade level. Sometimes providers forget to update this data at the beginning of a new year (thus a student may end up as a perpetual sixth grader!), or when the information is updated, baseline data that was associated with the student gets lost. Be sure to talk with your technology provider about how to track and report longitudinal data across multiple organizations before you set up your system.

their program partners deadlines for getting participant data into the database. In Omaha, for example, middle school OST programs were given about one month for initial data submissions on their participants, with the expectation that they would then upload attendance data on a weekly basis. Likewise, after a longer transition phase, Boston decided that data would only count if it was in the database—whether a center entered data on six or 6,000 people, that is what would be reported to the Mayor's Office. Suddenly, the engagement of some of the slower-to-adopt BCYF centers skyrocketed. The staff at these centers were motivated to make sure their data was correct, in part to preserve funding and staffing levels.

Ultimately, for a shared measurement system to be useful, data must be accurate and complete. Initiative partners should identify clear incentives for providers who are expected to enter data. As one staff member in Boston put it, "What is the value-add for programs to keep their information up to date and current?" Enforcing deadlines and providing strong incentives for agencies to fully participate will establish the shared data effort within the community and eventually lead to the kind of data-driven decision making that most initiatives aspire to.

Keep Communication Open

Communication is vital for the success of a collaborative data effort, particularly in the early stages. From leadership (who need to be informed about how things are going), to the tech team (who need to know if staff are encountering bugs in the system), to frontline staff (who need to be kept in

the loop about changes to any of the data processes), there needs to be mechanisms in place to ensure ongoing communication. Some collaboratives set up a "cloud", or a virtual collaborative document-sharing space where resources are available (e.g., consent forms, database manuals, Frequently Asked Questions, etc.). Making data a regular, formal part of collaborative meetings is another way to keep it at the forefront of the work.

Indeed, members of the collaborative should have regular meetings that involve senior decision makers from each partner organization, once a month or more, at least at the beginning of database implementation. Eventually this group will examine trends in the data and discuss actions that should be taken in response. In the early days, however, the conversations should center around data quality and accountability: Is data flowing into the system? Is everyone doing what they committed to do? Do we have missing data or missing consent forms? Where do we need more training and support?

A certain amount of system-wide troubleshooting will be necessary. Often this is about the processes being used, more than the database itself. Is data being entered at the right times and with the right frequency? Which members of the collaborative need to see different types of data, how often and in what form? In nFocus Solutions'

TOOL



Gather information and feedback from collaborating agencies via an **Annual Database Review Survey**, available on our website: nfocus.com



experience, most of the issues that arise at this stage can be managed by clarifying or fine-tuning processes and/or providing additional training.

From time to time, though, as staff use the data system, they will discover something they wish it did differently. Responding to these requests, where feasible, is important both for optimizing the system and for keeping people excited about

using it. As one staff member in Omaha put it, “Your vendor needs to listen and continue to improve. Things may not be perfect for the way you do business. Technology does not drive what you do. nFocus had to listen, and they listen very well!”

Collaboratives should be sure to ask for feedback from users in training and support sessions, via online surveys, in meetings with different lev-

Dealing with the Family Educational Rights and Privacy Act (FERPA)

We have heard the cries from providers and school districts across the country: “FERPA, FERPA, FERPA!”—School districts won’t share data because of it. Providers are frustrated by the lack of access. The good news is FERPA laws are evolving, and many districts have figured out ways to use and share student information.

The new guide for afterschool collaborations published by NLC suggests three strategies for dealing with FERPA:

1. Have schools analyze the data themselves
2. Develop legal agreements that name a collaborative’s coordinating entity or its evaluator an “agent” of the schools (wherein the agent can access school data)
3. Request written permission from each student’s parent or guardian to share information

Omaha used the third strategy, and their experience provides a valuable model for other cities. The collaborative built relationships with key school district departments over time, including the Office of the Superintendent, the Research Office and the Student Information Services Office. They went through appropriate channels, starting by obtaining permission from the Superintendent’s Office to work with the other offices. From there, they brought in experts from The Education Counsel to help navigate FERPA regulations and to develop a common Release of Information form for parents, which secures permission for children’s academic data to be shared with program providers. Partners anticipate that data will start flowing during the 2012-2013 school year.

Another law that is frequently cited as a barrier to sharing information is the Health Insurance Portability and Accountability Act (HIPAA), which generally allows for sharing of aggregate de-identified medical data but restricts sharing of individual information. Neither HIPAA nor FERPA have to act as deal-breakers for communities working to share data. Local leaders just need to get the facts about how to properly handle individual data in their state. In Omaha, Building Bright Futures is creating a training program for local agencies to proactively educate them about relevant data sharing policies. One of the lessons of Omaha’s journey is the value of bringing in experts at key points; they can help you navigate privacy concerns and laws as you design your system and processes.

els of staff and even by observing staff as they enter data and create reports. Continuously improving the system (setting it up to capture new kinds of information or automatically populate certain fields, for instance) will help ensure that the shared measurement effort meets its goals.

Naturally, as the effort progresses, there will be higher- and lower-performing organizations. Agencies that are farther along—i.e., successfully entering data, running reports and developing a true “performance management” culture—may be able to actively mentor the others. Initiative leaders should create opportunities for staff at partner agencies to come together and share lessons learned.

Celebrate Interim Wins

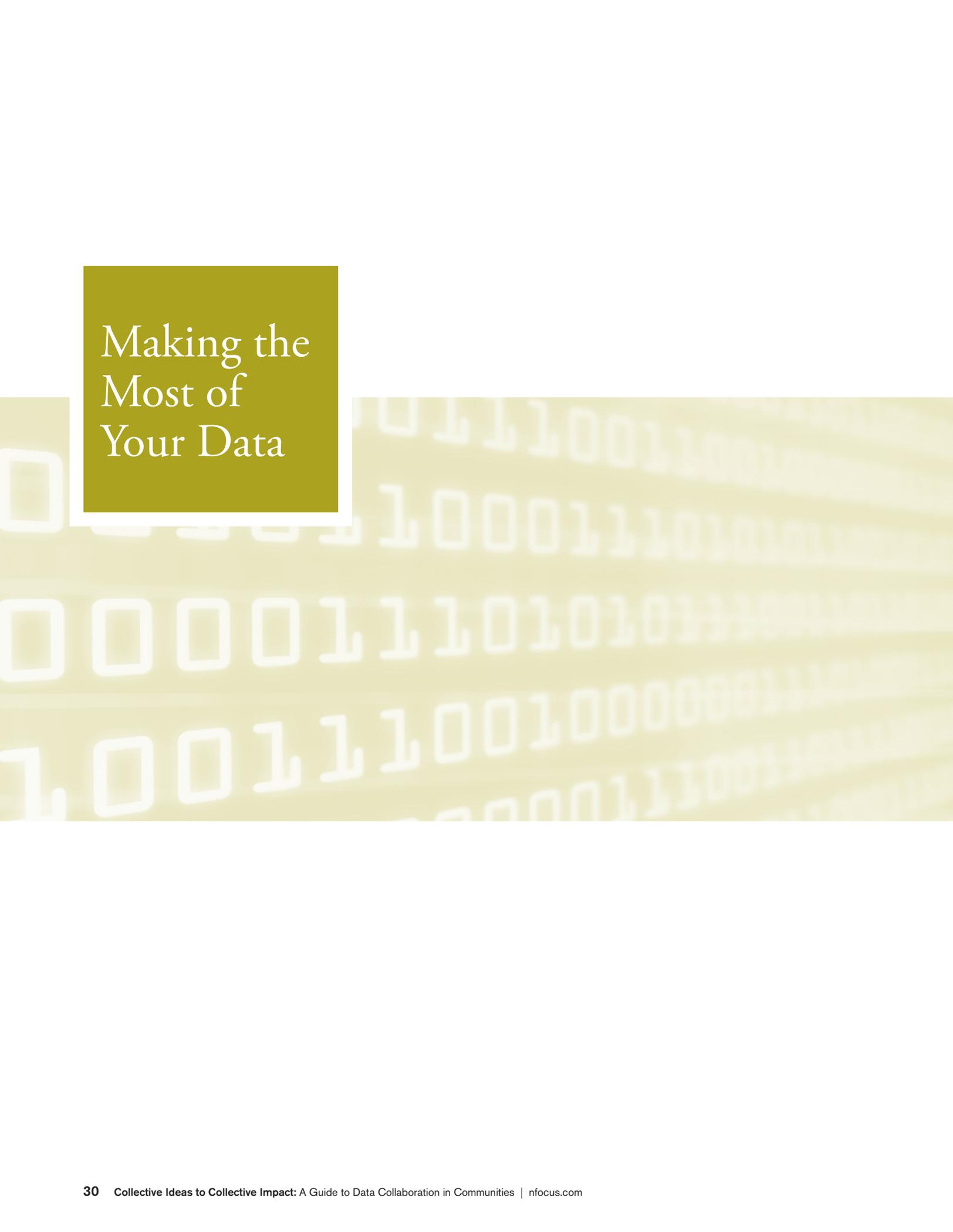
Stakeholders in both Omaha and Boston reflected on how important it is to celebrate achievements throughout the life of the collaborative data effort. Maybe it’s the completion of initial training, the first week that every agency enters their data on time or the first missing data report with no missing data. Make sure to recognize organizations that are doing well (or have improved) and to highlight significant milestones for the collaborative. Doing so will help maintain buy-in and momentum for the shared measurement effort.

TOOL



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Frequently Asked Data Management

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Making the Most of Your Data



Making the Most of Your Data

One of the most important questions facing social programs, funders and government agencies today is how to move from collecting data for accountability purposes to actually using data to make programs better. Within particular organizations as well as at the collaborative level, information must be examined and used to spur action on a regular basis. Developing this sort of data-driven culture is central to collective impact work.

Produce the Right Reports

Collaboratives have to determine which reports need to be produced and viewed at different levels. In essence, this is about deciding which information needs to be monitored by various individuals and groups and when, as the data that an initiative chooses to focus on most closely may change over time.

In general, the leadership of a collaborative will want to look at broad trends and initiative-wide outcomes and how particular programs may be contributing to the effort. When an initiative is first getting off the ground, reports tend to focus on participation (who is attending, what they are attending, and how often), referrals (from which organizations to which others) and demographics (grade level, race/ethnicity, etc.). However, as the initiative matures, outcome data becomes more reliable. Reports should begin to highlight short- and long-term indicators of progress—both for the initiative overall and broken down by program.^{xx}

The Boston About Results website tracks a number of key performance indicators for BCYF centers, including the number of visits to the centers (there have been more than 1.2 million in 2012 so far!), the number of participants in special events, youth engaged by outreach workers, youth referred for services and children served in OST programs. Each indicator is assessed against goals on a regular basis and assigned a color: green where BCYF has exceeded the target, yellow where it is near the target and red where it has fallen short. This provides an easy

way for BCYF leaders to focus on aspects of the centers that require attention.

Individual providers may want to zero in on particular pieces of the larger data puzzle. For example, Boston is building dashboards that look at utilization within each BCYF center. The goal is to provide each center with real-time access to data that are important to their staff for planning purposes, such as:

- Attendance by type of program (for example, arts, community, education, sports)
- Attendance by activity or program group (for example, basketball, soccer, baseball)
- Utilization by age, for drop-in and ongoing activities
- Average daily attendance rates overall for the center

As a leader in Omaha pointed out, ensuring that individual programs' success metrics are logically connected to larger initiative goals is an essential part of the collective impact process. Stakeholders in Omaha have given a great deal of thought to the kinds of metrics that they should track at each level. For instance, individual afterschool programs may focus on improving students' vocabulary, reading comprehension or enthusiasm for reading—each of which can be measured and tracked. These outcomes, in turn, are expected to



support improved academic achievement, which is being measured and tracked at the community level.

Have the Right Meetings

Of course, examining data is not enough. There must also be regular opportunities to review and discuss data as a team. Meetings should always include:

1. Someone who is skilled enough as a facilitator to move the group from discussion to action
2. Someone who is empowered to make relevant decisions (this may or may not be the same person)

The atmosphere in meetings should be one of collective inquiry, not inquisition. If people believe that data will be used to “punish” them, they are unlikely to engage with it in meaningful ways. Instead they need to feel encouraged to ask hard questions and to speculate about what might be influencing their results. What are we seeing and why? What could we do better? These conversations can be used to develop concrete “data-to-action” plans that help drive improved performance.

While the Omaha collaborative is just getting started with their initiative-wide data reporting and analysis, individual partner organizations have already begun working with their data in impressive ways. Avenue Scholars Foundation, for instance, held a series of “data days” in the summer of 2012, during which they examined and discussed program data and came up with action steps in response to the patterns they observed. Data was put into a simple format with guiding questions. Teams were asked what they saw in the data that was presented. Why did they think this was occurring, and what could be done about it? According to a participant, the only rule was that responses had to be framed “not around what kids can or can’t do, but what the program can do.” After two days, Avenue Scholars emerged with a set of

clear recommendations that will be implemented during the 2012-2013 school year.

There are also national conventions offered by organizations like Strive Together and Ready by 21 that can help collaboratives make better use of their data. In partnership with Search Institute, nFocus Solutions offers the annual **Communities for Change** symposium, which is founded on the principle that driving improved performance and accurately measuring outcomes is vital for achieving meaningful, positive change in communities. The symposium brings together leaders from the education, nonprofit, foundation and public sectors to exchange information about successes, lessons learned and opportunities to better bridge the achievement gap through innovative school and community partnerships.

TOOL



Download the **Data-to-Action Plan** tool from our website: nfocus.com



Sustaining the Work



Sustaining the Work

While the initiatives that we looked at are still relatively young, their leaders are thinking long-term. Both have the benefit of a relatively stable base of funding. In Boston, the shared data effort is institutionalized as part of the city government. Having a core funder who provides long-term support—not just of services, but also infrastructure, including that related to the shared data effort—is absolutely vital to the success of a collective impact initiative. Individual participating agencies and the larger data collaborative will have to cover a range of costs, year in and year out. This will include staff time (to collect, enter, analyze and act on data), upgrades to hardware or software, annual licensing fees, new system development and ongoing training and support.

Collaboratives may need to help funders understand the importance and benefit of these long-term investments. Some funders have notoriously short attention spans, and data collaboration is a long-term proposition. (For tips on how funders can better support performance measurement in nonprofits, see Bridgespan’s *Building Capacity to Measure and Manage Performance*.) It is good to remember, as FSG recently observed, that although shared measurement systems can take years and millions of dollars to develop, “the cumulative annual savings among participating organizations can dwarf the initial time and money invested.”

Broadly speaking, initiatives have to stoke energy and enthusiasm for a data collection effort. They need to maintain commitments from key partners, which can be particularly challenging if leadership changes hands (a new board chair or executive director at a nonprofit or a newly elected public official, for example). Most initiatives also plan to engage new partners over time, expanding the net of organizations that participate.

One strategy for keeping enthusiasm high is to

effectively communicate the results of the collective impact initiative. A good website and regular email newsletters, periodic meetings with key stakeholders, outreach to the media and polished materials (slides, brochures, etc.) can go a long way toward building support for an initiative’s work. Data should always be front and center in these communications.

It is also essential for the data effort to evolve along with the larger collective impact initiative. As the initiative matures, data needs may change. Members of the collaborative should occasionally reassess the data being collected, the processes in place to review, analyze and respond to the data and the system itself.

From Performance Management to Research and Evaluation

Omaha’s team is working to develop the Minerva Project, a research arm for their collaborative, which would create and pursue a formal research agenda, study what works across the initiative and publish the results. The goal is to provide analysis and insights that strengthen Building Bright Futures and to determine where program strategies might be replicated by other communities.



Closing Thoughts



Closing Thoughts



Developing an effective shared measurement system is challenging work, but it can yield tremendous benefits for participating agencies and the communities they serve. These systems can help partnering organizations coalesce around common goals, measured in common terms, and enable them to deploy strategies that ultimately make a profound difference in people's lives. Shared data systems can help communities focus on outcomes that matter and encourage accountability for improving results. For all of these reasons, they are a linchpin in collective impact work.

The authors of the recent White House Council on Community Solutions report concluded with a powerful message about the potential of community impact initiatives: “In today’s resource-constrained environment, communities are struggling to find ways to better address their greatest challenges and achieve more impact. Community collaboratives represent a growing trend that offers real hope that more can be achieved—that high school graduation rates can rise, teen pregnancy rates fall and communities beset by violence see a renewal of peace.... The time is ripe for such efforts to build momentum. We have the benefit of learning from previous generations’ efforts and a growing body of knowledge about effective approaches. Public and private sources are beginning to dedicate funding to support community collaboration. And across the country we have seen that there is a broad constituency for change, a shared sense of purpose and a renewed opportunity to include those left out of the American dream.”

We see shared measurement as essential to realizing this potential. The experiences of Boston, Omaha and other cities at the forefront of the collective impact movement should inform the work of future initiatives. Careful planning, strong leadership, good communication and attention to the kinds of details outlined in the preceding pages will strengthen collaborative data efforts and, in the end, produce better results for children, families and communities.

“Shared data systems can help communities focus on outcomes that matter and encourage accountability for improving results.”



Toolbox



Selecting a Technology Provider



Selecting a Technology Provider

This scoring template is designed to help data collaboratives identify a strong technology partner. This tool is adapted from an assessment that Building Bright Futures in Omaha used to identify nFocus Solutions as their community data management partner. **Each category is rated on a 1 to 5 scale, 1= poor to 5 = excellent.**

CATEGORY AND ITEM	WHAT THIS MEANS FOR YOU	EVIDENCE OF THIS IN VENDOR'S PRODUCT/ OTHER NOTES:
Over-all Requirements	Over-all Requirements	
Log-in Process	Is it easy for users to log-in to the database? How are usernames and passwords generated, changed and disabled?	
Look and Flow of System	Overall, how does the database 'look' to you? Does it appear user-friendly? Does the standard flow between functions and components seem intuitive to you?	
Ease of Implementation	What is the overall implementation process for the database? Will it require a lot of 'hands-on' work on your end? Are you prepared for that? Will it be compatible with your current technology setup and systems? Does the database have the proven capacity to easily scale up to serve many partners each utilizing different systems and approaches?	
Accessibility of Database	Can you access the database from any work station that has internet access or does an application need to be installed on each computer? Is this important to you?	
Overall Functionality	Are the functions of the database useful to you? Are there functions you think are missing that you wish were available?	
Customizable Options	Can you customize options of the database, like how data is reported? Can you hide specific data fields for certain users? How difficult is it to customize functions; can you do it in house or does it need to be done by the vendor?	
User-Friendliness/Data Entry	How easy is it to enter and manipulate data? And overall does the system feel user-friendly to you?	
Data Import and Export	Can you import data easily from other systems (Microsoft Office applications or other database)? Can you also export data to other systems or statistical packages for analysis purposes?	
Search Options	There should be several ways to search and find data. How easy is it to find specific data? How easy is it to access documents, surveys, case management notes or other materials that you may use your database for?	
Scanning Ability, Use of System on Tablets, Other Devices	Is there an attendance scanner capability for the database? Is it easy to set up and use? Does it require a reconfiguration of your physical or tech setups? Can you use a tablets to manage/enter data/review data?	
Training and Support Offered to End Users	Is there strong training and support offered to end users? Is the customer support knowledgeable and helpful? Is there an additional cost to use them for certain services?	
Data Archiving and Collecting Longitudinal Data	How is data 'stored' over a period of time? Is it stored longitudinally, so if a specific indicator changes over time, you have the baseline data always available?	
	Score for Overall Requirements: ____ 1= poor to 5 = excellent	



Selecting a Technology Provider

This scoring template is designed to help data collaboratives identify a strong technology partner. This tool is adapted from an assessment that Building Bright Futures in Omaha used to identify nFocus Solutions as their community data management partner. **Each category is rated on a 1 to 5 scale, 1= poor to 5 = excellent.**

CATEGORY AND ITEM	WHAT THIS MEANS FOR YOU	EVIDENCE OF THIS IN VENDOR'S PRODUCT/ OTHER NOTES:
Administration and Security	Administration and Security	
Administrator Options	Do you need a dedicated staff to be the database administrator? If so, do you have a person identified to fulfill this role? Will they be fully trained and supported by the vendor? What can an administrator do vs. the vendor?	
Passwords	Passwords should be protected according to appropriate procedures that you will utilize. How are passwords stored, generated, disabled?	
Individual, Group, and Organization User Settings	Can you set certain 'group' settings for users in 'role alike' groups (like all afterschool providers?)	
Audit Trail	Can you see who makes changes to data and when they did it? Is this important to you?	
	Score for Administration and Security Requirements: _____ 1= poor to 5 = excellent	
Reports	Reports	
Interpretation of Reports	Are reports easily found and accessed? Do they 'work'? Can you interpret the reports easily, and does the language they use make sense to you?	
Report Export Capability	Can you export data and reports to Microsoft programs easily?	
Customizable Reports Function	Can you customize reports? And if so, is it easy to determine how to do this (using a querying function)? Can tech support help you with this, and if so, is there an additional fee to do so?	
Format of Reports	Is the format of reports useful? Does it allow data to be displayed graphically, GIS tables, dashboards?	
Reporting Views Across Partner Organizations	Can you view data easily across partner organizations? What data is available across partners? How 'deep' does this data go (participant level, program level)?	
	Score for Reports: _____ 1= poor to 5 = excellent	



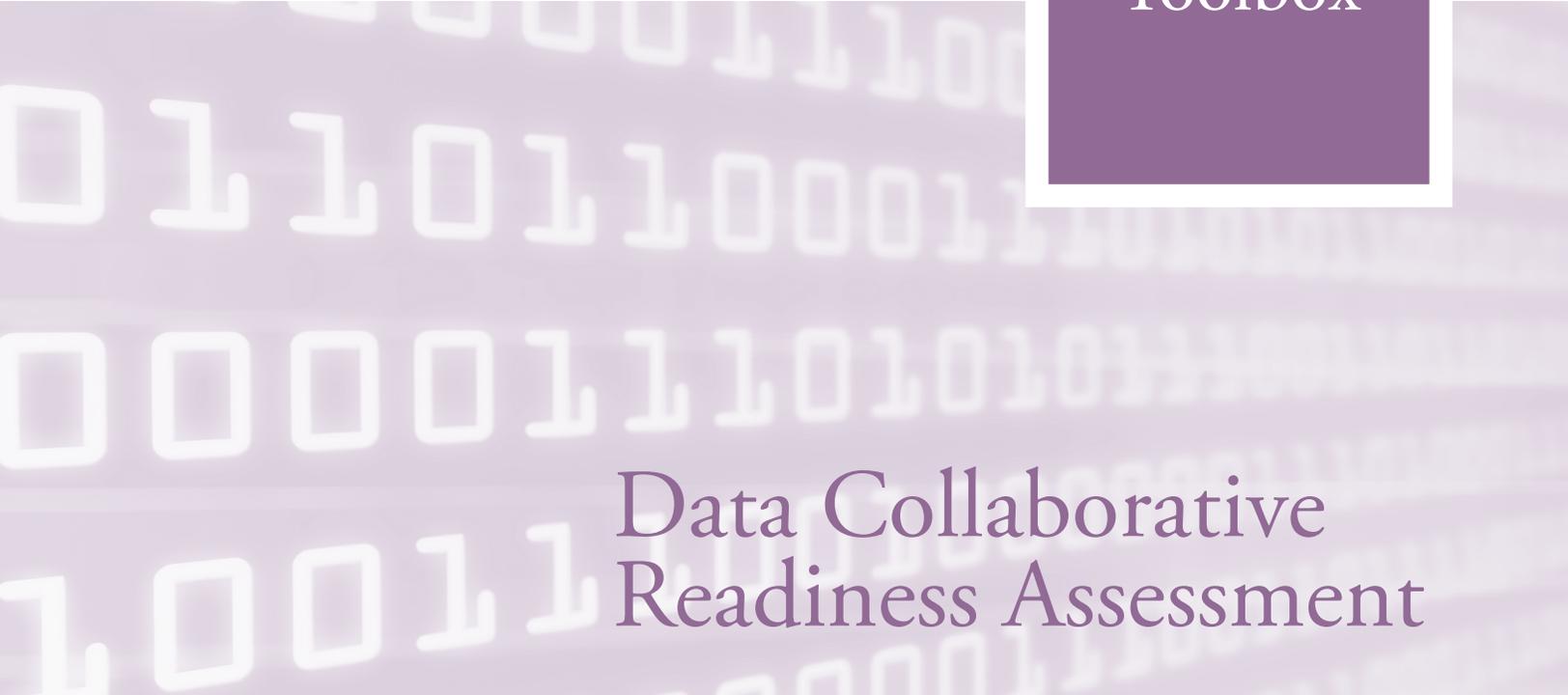
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CATEGORY AND ITEM	WHAT THIS MEANS FOR YOU	EVIDENCE OF THIS IN VENDOR'S PRODUCT/ OTHER NOTES:
Vendor Assessment and Support	Vendor Assessment and Support	
Stability	How long have they been in business? How long have they been working with organizations/collaboratives like yours? How many clients do they have using the application you are thinking about purchasing?	
Professionalism	Do you like their approach to working with you? How do they demonstrate their products? What do they think their mission is, and does it align with yours? Are they responsive to your need?	
Upgrade Availability and Cost	When upgrades are available, is there a cost associated with it? How often do upgrades occur, and will it be disruptive to data flow, etc?	
Customer Base	Who are their current customers? Is there a track record of success with multi-agency partners sharing data (even using different systems)?	
	Score for Vendor Assessment and Support Requirements: _____ 1= poor to 5 = excellent	
Additional Items	Additional Items	
Data Imports, Batch Uploads	How easily is data uploaded/downloaded from other systems? And how is data integrated across systems for matching, as an example?	
Web Platforms Accessibility	Can you access all areas of the database from all web browsers (not just Internet Explorer, for example)?	
Customize Surveys and other Tools	Can you customize surveys and other measurement tools for your purposes?	
Participant Log-Ins	Can participants log-in to the system to take a survey, make a payment, or do other participant functions?	
Point of Sale and Other Financial Capabilities	Does the database have the ability to do purchases, manage payroll, take donations, and manage grant reports?	
Referrals to Internal and External Partners	Can you make referrals both within your data network and then also outside of it?	
Experience with School Data	Does the vendor have experience aggregating or uploading data from school systems? Experience actively sharing student data while meeting the guidelines of FERPA?	
Data Aggregation	Do the vendor's products have the ability to easily aggregate and report on data across various databases and systems that may already exist in the community?	
	Score for Additional Items Requirements: _____ 1= poor to 5 = excellent	



Toolbox



Data Collaborative Readiness Assessment



Data Collaborative Readiness Assessment



Use this tool to gauge your readiness to launch a data-driven multi-agency project. The tasks listed below consist of 'to-dos' to launch a data collaborative. For each task, indicate if you think you have hit this milestone (if yes, give yourself 1 point, if no, give yourself 0 points). If you have hit the milestone, write down the evidence of this. If you have not yet hit it, indicate your 'to-dos' for the next 3-6 months to ensure you stay on the path to success. At the bottom of the table, add up your total score. It will give you a sense of how far you have come and how much further you need to go!

TASK	Have you reached this milestone? Yes= 1 point, No= 0 points
We have defined who will lead the Community Data Team. The Community Data Team will lead the system-building effort as well as identifying the indicators and outcomes of our collaborative.	
We have determined which partners will participate in the pilot and which we will bring on beyond the pilot.	
We have brought all partners together to discuss what the data collaborative will achieve.	
We have developed a staged approach to this work, with a pilot phase, full implementation, and sustainability plan identified.	
We have identified a staff member at each partner organization who can lead and communicate about the data effort at different levels (executive, program staff, training, champions)	
We have identified a lead agency where key staff will be housed, data will be shared, and lessons learned will be disseminated.	
We have identified sufficient funds or an institution(s) willing to sustain the data collaborative for the number of years we hope to be in business.	
We have developed (or will develop) a theory or logic model of change for our collaborative, which is grounded in research and outlines program strategies, program partners, and key indicators to help us learn if we are achieving our intended outcomes.	
We have identified where redundancies may lie in data collection, with program applications and data asks (e.g., to the school districts) and have developed a plan to eliminate or align them.	
We will develop a comprehensive data dictionary that defines indicators uniformly across the collaborative.	
We have a documented the process for how data collection will happen (the data flow).	
We are developing memos and data sharing agreements across partners, including negotiating around issues related to HIPAA and FERPA.	
We are committed to identifying a data collection system that will meet both our collective and individual partner needs, and using a thoughtful process to select one (see Selecting a Technology Provider).	
We are committed to working with executives and administrators to create a culture of using data and not merely collecting data. (Moving beyond compliance to data-driven decision making.)	

Total Score: _____

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About nFocus Solutions™

nFocus Solutions is dedicated to the development of innovative technologies and intelligent business solutions for the public sector. We are a leading provider of applications, services and technologies that community-based organizations, government agencies and public schools rely on to make their organizations more effective. Our high-quality data management and analysis software enable nFocus Solutions clients to achieve clear, well-defined results that change the world. Visit nfocus.com or connect with us on Facebook, Twitter and YouTube to learn more.