COLLECTIVE IMPACT EVALUATION

INTRODUCTION

The United Way of Berks County tackles interconnected issues like school readiness, reading proficiency, financial stability, helping people meet basic needs and leading healthy lives through our four focus areas: Education, Income, Health and Safety Net Services. The United Way supports Collective Impact (CI) initiatives in those four focus areas. Collective Impact is an innovative approach to bring people together, in a structured way, to achieve social change.

Collective Impact evaluation is not like traditional program evaluation methods. Traditional evaluation methods measure progress and change toward individual behavior, driving toward the mission of one organization. CI evaluation requires measurement toward progress and change across community conditions, driving toward a shared, aligned, common vision of the whole. At its core, CI evaluation is about learning: learning how to "do" CI—how to communicate and collaborate across sectors, forge new relationships, set shared goals, assess progress together, and use data to make decisions—and learning how to generate momentum, shift systems, change behavior, and, ultimately, solve a problem more effectively. Evaluation findings can help improve CI partners' understanding of the data gathered through their performance measurement and shared measurement system activities. In addition, evaluation can give CI partners increased confidence in making decisions and taking action.
https://www.fsg.org/publications/guide-evaluating-collective-impact

PART ONE: BUILDING THE RIGHT STRUCTURE

Part One evaluates the degree to which to Collective Impact efforts have developed the four critical components to any collaborative structure: Common Agenda, Continuous Communication, Mutually Reinforcing Activities, and Shared Measurement.

PART TWO: MAINTAINING AND IMPROVING THE PROCESS

Part Two evaluates the continuous improvement for the collaborative. Note, every component in Part One also tracks for continuous improvement. This section examines the intentional steps taken toward maintaining a learning culture and building capacity.

PART THREE: DEMONSTRATING CHANGE

Part Three evaluates the degree to which change is taking place in the community. Specifically, questions are designed to look at behavior change as well as systems change efforts in the targeted area.

INSTRUCTIONS TO COMPLETE

Every question lists four criteria in an area critical to long-term success of Collective Impact collaborative effort. Check each criterion applicable to your collaborative. Then circle the summary response for each question, based on the number of criteria checked. Be honest about where you are today, and the plans for the structure to progress and improve. Some sections may apply more directly to efforts in their later years; however, every backbone organization should complete each section, no matter if in "early" "middle" or "later" years of the effort. Feel free to add your own criterion to the success of your effort in the space provided.

If you have any questions, please contact Kristin Gehris, Community Impact Director at United Way of Berks County at 610.685.4567 or kristing@uwberks.org.

PART ONE, SECTION ONE: **COMMON AGENDA**

[Q1] DOES THE COLLABORATIVE HAVE A DEFINED, SHARED VISION?

Check if criteria are met:

☐   Partners agree on a general focus area (e.g. "education" or "the UW community goal").
☐   Partners took part in collaborative dialogue or process.
☐   Partners have clearly defined, agreed-upon, and published (on brochures, documentation, internet, etc.) vision.
☐   The vision is reviewed by the partners on a regular basis (e.g. annually), to take new data and partners into account.

Select your response:

     Meets all criteria   Meets some criteria   Does not yet meet criteria

Please comment on your progress; specifically what steps are being taken if you do not yet meet the criteria.

[Q2] DOES THE COLLABORATIVE AGREE ON A CLEARLY DEFINED TARGET POPULATION?

Check if criteria are met:

☐   Partners agree on a general target (e.g. "Berks County students" or "people in poverty").
☐   Partners took part in collaborative dialogue or process.
☐   Partners have clearly defined and agreed-upon target population.
☐   The target population is reviewed on a regular basis (e.g. annually), to take the changing community into account.

Select your response:

     Meets all criteria   Meets some criteria   Does not yet meet criteria

Please comment on your progress; specifically what steps are being taken if you do not yet meet the criteria.

[Q3] DOES THE COLLABORATIVE CONVENE AN APPROPRIATE LEADERSHIP STRUCTURE?

Check if criteria are met:

☐　　　Community meetings of partners take place on a regular basis.

☐　　　Partners *actively* contribute to the development of a collaborative structure.

☐　　　Partners have clearly defined, agreed-upon *and documented* leadership structure.

☐　　　The collaborative includes all representation needed to accomplish its goal(s).

Select your response:

　　Meets all criteria　　　　　　Meets some criteria　　　　　　Does not yet meet criteria

Please comment on your progress; specifically what steps are being taken if you do not yet meet the criteria.

PART ONE, SECTION TWO: **SHARED MEASUREMENT**

[Q4] DOES THE COLLABORATIVE HAVE A SHARED MEASUREMENT STRUCTURE?

Check if criteria are met:

☐　　　Partners took part in collaborative dialogue or process on measurement.

☐　　　A shared measurement system is in place. If yes, please note what system: _____

☐　　　The system is understood and accessible to all participants.

☐　　　The system is reviewed and updated on a regular basis (e.g. annually).

Select your response:

　　Meets all criteria　　　　　　Meets some criteria　　　　　　Does not yet meet criteria

Please comment on your progress; specifically what steps are being taken if you do not yet meet the criteria.

[Q5] HOW DOES THE MEASUREMENT SYSTEM INFORM THE WORK?

Check if criteria are met:

☐   Measures are tracked at least annually.

☐   Partners are informed – and may contribute to – continued tracking of measures, no matter the frequency.

☐   A set of the measures can be tracked on a "real time" basis (e.g. monthly, quarterly).

☐   Tracked data, both annual and "real time," is used to inform decision-making on key strategies.

Select your response:

     Meets all criteria   Meets some criteria   Does not yet meet criteria

Please comment on your progress; specifically what steps are being taken if you do not yet meet the criteria.

PART ONE, SECTION THREE: **MUTUALLY REINFORCING ACTIVITIES**

[Q6] ARE UNIQUE ROLES AND RESPONSIBILITIES DEFINED ACROSS THE COLLABORATIVE?

Check if criteria are met:

☐   Strategies are aligned to achieve the goal(s) of the collaborative.

☐   Partners respectfully cooperate, and do not compete, in order to accomplish the work.

☐   Partners took part in a collaborative dialogue or process to define strategies.

☐   An action plan or other document clearly specifies roles and activities for each partner.

Select your response:

     Meets all criteria   Meets some criteria   Does not yet meet criteria

Please comment on your progress; specifically what steps are being taken if you do not yet meet the criteria.

[Q7] TO WHAT DEGREE DOES THE ACTION PLAN (OR OTHER GUIDING DOCUMENT) INFORM THE WORK?

Check if criteria are met:

☐　　　The action plan or other document is recorded and maintained by the leadership structure.

☐　　　Partners are aware of the action plan or other document and have a copy for their records.

☐　　　Working groups, or another collaborative structure, have been formed and regularly discuss coordinated strategies.

☐　　　Leadership regularly reviews action plan strategies, as informed by the working groups /collaborative structure.

Select your response:

　　Meets all criteria　　　　　　Meets some criteria　　　　　　Does not yet meet criteria

Please comment on your progress; specifically what steps are being taken if you do not yet meet the criteria.

PART ONE, SECTION FOUR: **CONTINUOUS COMMUNICATION**

[Q8] DO PARTNERS COMMUNICATE ACROSS THE COLLABORATIVE?

Check if criteria are met:

☐　　　Regular meetings are scheduled, in some structured way (e.g. working groups).

☐　　　Partners regularly attend and participate in regular meetings.

☐　　　Partners communicate and coordinate efforts with one another regularly (at least quarterly).

☐　　　The collaborative regularly seeks feedback from external stakeholders and the general community about the work.

Select your response:

　　Meets all criteria　　　　　　Meets some criteria　　　　　　Does not yet meet criteria

Please comment on your progress; specifically what steps are being taken if you do not yet meet the criteria.

PART TWO, SECTION ONE: **MAINTAINING A LEARNING CULTURE**

[Q9] DOES ONGOING LEARNING TAKE PLACE AMONG PARTNERS?

Check if criteria are met:

☐ Partners include time for reflection and discussion in their formal structure (e.g. agenda items in meetings)

☐ Partners take part in a self-assessment and dialogue, at least annually.

☐ Partners regularly (at least quarterly) share observations, challenges, setbacks, lessons with one another.

☐ Partners challenge one another by raising questions to clarify assumptions and beliefs about strategy and activities.

Select your response:

Meets all criteria   Meets some criteria   Does not yet meet criteria

Please comment on your progress; specifically what steps are being taken if you do not yet meet the criteria.

[Q10] HAS THE COLLABORATIVE ESTABLISHED A CULTURE OF TRUST AND INCLUSION?

Check if criteria are met:

☐ The collaborative is composed of internal stakeholders that represent the target population for the work.

☐ Decision-making processes are open and transparent.

☐ The collaborative operates within a culture of trust: partners feel included in decision-making practices.

☐ The collaborative actively solicits and acts on feedback from external stakeholders and community members.

Select your response:

Meets all criteria   Meets some criteria   Does not yet meet criteria

Please comment on your progress; specifically what steps are being taken if you do not yet meet the criteria.

[Q11] ARE SUFFICIENT FINANCIAL RESOURCES IN PLACE FOR THE COLLABORATIVE TO DO ITS WORK?

Check if criteria are met:

☐   At least one funder is identified and contributes a multi-year grant to assist the backbone and leadership structure.

☐   The backbone and leadership structure have secured funding from multiple sources to support the work.

☐   Sufficient operating support is available to enable backbone staff and collaborative leadership to fulfill responsibilities.

☐   Funding received is flexible and responsive to the changing approaches, strategies, and activities of the collaborative.

Select your response:

Meets all criteria   Meets some criteria   Does not yet meet criteria

Please comment on your progress; specifically what steps are being taken if you do not yet meet the criteria.

[Q12] ARE STAKEHOLDERS ABLE TO IMPROVE THEIR WORK AS A RESULT OF COLLABORATIVE SUPPORT?

Check if criteria are met:

☐   The collaborative has supporters who *actively* champion the work in the broader community.

☐   Talents within the leadership structure include necessary skills as strategic planning and problem solving.

☐   Skills and capacities of partners report improvements in organizational capacity (e.g. increased use of data to inform work).

☐   Partner organizations, and their constituents, report greater effectiveness in work related to the collaborative.

Select your response:

Meets all criteria   Meets some criteria   Does not yet meet criteria

Please comment on your progress; specifically what steps are being taken if you do not yet meet the criteria.

PART THREE, SECTION ONE: **CHANGING BEHAVIORS**

[Q13] ARE COLLABORATIVE PARTNERS CHAMPIONS FOR THE WORK?

Check if criteria are met:

☐   Staff and volunteers within partner organizations have increased awareness of the goals of the collaborative.

☐   Staff and volunteers within partner organizations have increased engagement in identified key strategies.

☐   Partner organizations understand and endorse the efforts of the collaborative at the leadership level.

☐   Policies, action plans, or other strategic documents are adopted by partners to support goals of the collaborative.

Select your response:

Meets all criteria   Meets some criteria   Does not yet meet criteria

Please comment on your progress; specifically what steps are being taken if you do not yet meet the criteria.

[Q14] DOES THE TARGETED POPULATION RECEIVE GREATER ATTENTION SINCE THE GOAL WAS IDENTIFIED?

Check if criteria are met:

☐   Partner organizations are prioritizing the goals of the collaborative.

☐   Partner organizations have made concrete changes or improvements to service delivery, in alignment with goals.

☐   The targeted population is receiving greater attention, as serviced by collaborative partners.

☐   Based on feedback from the population served, partners are able to further improve service delivery.

Select your response:

Meets all criteria   Meets some criteria   Does not yet meet criteria

Please comment on your progress; specifically what steps are being taken if you do not yet meet the criteria.

PART THREE, SECTION TWO: **CHANGING SYSTEMS**

[Q15] ARE SOCIAL AND CULTURAL NORMS EVOLVING TO SUPPORT THE GOALS OF THE COLLABORATIVE?

Check if criteria are met:

☐ Media messages support the desired behavior targeted by the collaborative (e.g. Public Service Announcements, blogs).
☐ Social media messages support desired behavior targeted by the collaborative (e.g. Facebook, Twitter, YouTube)
☐ The public narrative surrounding the targeted issue area/system includes language and messaging supporting the goals.
☐ The public narrative surrounding the targeted issue area/system is promoted by external stakeholders, without prompting.

Select your response:

Meets all criteria   Meets some criteria   Does not yet meet criteria

Please comment on your progress; specifically what steps are being taken if you do not yet meet the criteria.

[Q16] HAS PROGRESS BEEN MADE BY MEANS OF ADVOCACY AND PUBLIC POLICY?

Check if criteria are met:

☐ The collaborative includes discussion policy at the working group and leadership levels.
☐ Collaborative has a policy agenda, informed or vetted by key stakeholders.
☐ Members of the collaborative participate in advocacy activities, with intention to affect public policy.
☐ Public policy is passed (e.g. ordinance, ballot-measure, and legislation) in support of collaborative goals.

Select your response:

Meets all criteria   Meets some criteria   Does not yet meet criteria

Please comment on your progress; specifically what steps are being taken if you do not yet meet the criteria.

ORGANZIATION INFORMATION

Organization Name: _____

Contact Name: _____

Date Completed: _____