Shared Measurement: A Good Idea, Poorly Implemented, But Still Redeemable
The Challenge

Developing a shared measurement system is essential to collective impact. Agreement on a common agenda is illusionary without agreement on the ways success will be measured and reported. Collecting data and measuring results consistently on a short list of indicators at the community level and across all participating organisations not only ensures that all efforts remain aligned, it also enables the participants to hold each other accountable and learn from each other’s successes and failures.

John Kania
FSG
What is shared measurement?

**IS:**

Common metrics that help us ask the questions:

*WHAT progress are we making?*

*HOW does this information help us make better decisions?*

**IS NOT:**

- Meant to measure the impact of a single organization or intervention
- Simple data collection
- Focused only (or mostly) on programmatic measures
- Meant to be punitive
- Meant to foster competition
- A once-a-year report
- A retrospective evaluation
Shared measurement can be both an input to evaluation (by providing data and/or shaping evaluation questions) and an object of evaluation.

**Evaluation** refers to a range of activities that involve the planned, purposeful, and systematic collection of information about the activities, characteristics, and outcomes of a CI initiative.

**Shared measurement systems (SMS)** use a common set of indicators to monitor an initiative’s performance and track its progress toward goals.
The Road Map Project’s goal is to **double the number of students** in South King County and South Seattle who **are on track to graduate from college or earn a career credential by 2020**.

We are committed to nothing less than **closing the unacceptable achievement gaps** for low income students and children of color, and increasing achievement for all students from cradle to college and career.”
Road Map: Intermediate Outcomes & Impact

- **Readiness**: Healthy and ready for Kindergarten
  - % of children ready to succeed in school by kindergarten

- **Supported and successful in school**: % of students proficient in:
  - 3rd grade reading
  - 4th grade math
  - 5th grade science
  - 6th grade reading
  - 7th grade math
  - 8th grade science
  - % of 9th graders triggering Early Warning Indicator #1
  - % of 9th graders triggering Early Warning Indicator #2

- **Achievement**: Graduate from high school – college and career-ready
  - % of students who graduate high school on-time
  - % of graduating high school students meeting minimum requirements to apply to a Washington State 4-year college
  - % of students who directly enroll in postsecondary education
  - % of students continuing past the first year of postsecondary
  - % of students at community and technical colleges enrolling in pre-college coursework

- **Attainment**: Earn a college degree or career credential
  - % of students continuing past the first year of postsecondary
  - % students who earn a post-secondary credential by age 24

Source: http://www.roadmapproject.org/
Exhibit 7: Kindergarten Students Attending Full-Day Kindergarten

<table>
<thead>
<tr>
<th>Region</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Road Map Region</td>
<td>72%</td>
</tr>
<tr>
<td>Kent</td>
<td>100%</td>
</tr>
<tr>
<td>Tukwila</td>
<td>100%</td>
</tr>
<tr>
<td>South Seattle</td>
<td>97%</td>
</tr>
<tr>
<td>Federal Way</td>
<td>70%</td>
</tr>
<tr>
<td>Highline</td>
<td>51%</td>
</tr>
<tr>
<td>Renton</td>
<td>41%</td>
</tr>
<tr>
<td>Auburn</td>
<td>34%</td>
</tr>
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</table>

Source: Districts and OSPI, 2009-2010
## Road Map Project Annual report

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<thead>
<tr>
<th></th>
<th>2009–10 RATE</th>
<th>TREND</th>
<th>2012–13 RATE</th>
<th>CHANGE SINCE BASELINE</th>
<th>ON TRACK TO 2020 TARGET</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>All Students</strong></td>
<td>66%</td>
<td></td>
<td>69%</td>
<td></td>
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</tr>
<tr>
<td><strong>Auburn</strong></td>
<td>74%</td>
<td></td>
<td>81%</td>
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<tr>
<td><strong>Federal Way</strong></td>
<td>72%</td>
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<td>67%</td>
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</table>
Benefits of Shared Measurement

- Clarity of Focus
- Tracking Progress Toward a Shared Goal
- Enabling Coordination and Collaboration
- Improved Data Quality
- Continuous Learning and Course Correction
- Catalyzing Action
Steps in Shared Measurement

Design

Deploy

Develop
Key Challenges

- Difficulty in **coming to agreement** on common outcomes and indicators
- Concerns about **relative performance / comparative measurement** across providers
- **Limited capacity (time and skill)** for measurement and data analysis within participating organizations
- **Alignment among funders** to ask for the common measures as part of their reporting requirements
- **Time and cost** of developing and maintaining a system, both for human capital and technology
To what extent do you feel you have been successful in your efforts to integrate useful shared measurement of outcomes in your collective impact effort?
The Continued Evolution of Shared Measurement: Five Emerging Principles
The Continued Evolution of Shared Measurement: Five Emerging Principles

1. Be certain about the outcomes you want to achieve before you commit ‘heavy’ to developing share measurement systems.

2. Distinguish between shared outcomes, shared measures and shared measurement.

3. Embed shared measurement process into effective learning & decision-making processes

4. Employ an agile versus ‘big design up front’ approach to development.

5. Balance the use of shared measurement for learning and accountability.
#1

Be certain about the outcomes you want to achieve before you commit to developing share measurement systems.
Ending homelessness for part time labourers In Surrey.

Reducing the number of children in residential care in south-east Asia.
Challenge: Emergent & Evolving Strategy

Traditional evaluation works best when people work with clear goals, well developed theories of change and fixed measures of success - and keeping these stable over time. However, all CI goals and strategies often emerge over time -- and often take radical shifts.
## The Strategy Continuum

- **Low certainty, agreement & stability**
  - **Emergent Strategies**
  - **Questions**: What activities, results and learnings are emerging from diverse initiatives? What (less) promising pathways and results might we pursue? What are implications for our emerging strategy?
  - **Measures**: Largely focused on initiative-level and specific measures until strategy is more fully developed.
  - **Design & Methods**: Diverse, highly adaptive, evolving & lightweight designs; emphasis on seeking patterns across experiments to inform strategy.

- **Umbrella Strategies**
  - **Questions**: What activities, results and learnings are emerging from diverse initiatives? Are we making progress on indicators of intermediate outcomes? What are the implications for our broad strategy?
  - **Measures**: Small (and growing) set of core and/or shared measures in addition to initiative-level measures.
  - **Design & Methods**: A narrow focus on customized designs for specific (clusters of) initiatives and a broader focus on assessing the cumulative results and process of the umbrella strategy.

- **High certainty, agreement & stability**
  - **Detailed Strategies**
  - **Questions**: Is implementation on track? What activities, results and learnings are emerging from diverse initiatives? Are we making progress on all key indicators? What should we refine in our strategy/plan/implementation?
  - **Measures**: Larger set of core and/or common shared measures in addition to initiative-level measures.
  - **Design & Methods**: Comprehensive, detailed and relatively fixed designs; emphasis on tracking progress towards key results at multiple levels.
#2
Distinguish between shared outcomes, shared measures and shared measurement.
“Cradle to Career” Initiative Organized Around Schools

• Outcome: Success in Gr. 3
• Measure: Grade 3 Success
• Measures: Scores on reading Tests

Ten Year Plan to End Homelessness in Calgary

• Outcome: Shorten time between shelter and permanent housing
• Measure: Length of time in shelter system (target is less than 7 days)
• Measurement: All shelters input time of stay into Calgary Homelessness Information System
The Principle

• Distinguish between shared outcomes, shared measures and shared measurement.

Some Practices

• Be clear about the shared outcomes of the project (see Seattle roadmap)

• Be selective about which measures should be shared.

• Be ‘hyper-selective’ about which deserve shared measurement.
#3
Embed shared measurement process into effective learning & decision-making processes.
General Motors (1970s-80s)
Data Heavy, Learning Light

Toyota (1970s-80s)
Data Light, Learning Heavy
We are often data rich, but sense-making and decision-making poor.
The Principle

- Develop data gathering, analysis, sense-making and decision-making processes together.

Some Practices

- Don’t start collecting new data until you have ‘made sense’ of existing data.
- Use structured inquiry & decision-making processes (e.g., What? So What? Now What?).
- Constantly test the ‘usefulness’ of data.
#4
Employ an agile – rather than waterfall or big-design up front – approach to developing shared measurement systems.
YOU CAN HELP ME STAY SAFE.

WHEN YOU SEE A PERSON IN DISTRESS, #JUSTCALL211 + PRESS 3

Agile Method
WATERFALL

Define → Build → Test → Release

Project Timeline
THE WATERFALL PROCESS

'This project has got so big, I’m not sure I’ll be able to deliver it!'

THE AGILE PROCESS

'Ver's so much better delivering this project in bite-sized sections'

Waterfall

- Successful: 57%
- Challenged: 42%
- Failed: 11%

Agile

- Successful: 49%
- Challenged: 42%
- Failed: 9%

The Principle

- Employ an agile — rather than waterfall or big design up front (BDUF) — approach to developing and using shared measures.

Some Practices

- Start by creating some ‘chunks’ of your measurement processes.
- Be prepared to adapt — even drop chunks — if and when the measures need to change.
#5 Balance the use of shared measurement for learning and accountability.
Evaluation & Measurement

Accountability

1. Did we implement our work as planned?
2. Did we meet quality and ethical Standards?
3. Did we make progress on desired results?

Learning

1. What are we learning about the challenge and how to address it?
2. What is working, and not, for whom, know and why?
3. What is in and out of our control? What is happening in the system?
Evaluation & Measurement: The Shadow Side

Accountability

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Inappropriate expectations
Rigidity
Superficial Learning
Blame Culture
Gaming behaviours

Insufficient expectations
Loose commitments
Weak momentum
Loss of agency
Drift
Gaming Behaviours with Accountability Measures

1. Tunnel Vision – managers chose the targets that are easiest to measure and ignore the rest.

2. Sub-optimization – managers choose to operate in ways that serve their own operation, but damage the overall performance of the system.

3. Myopia – managers focus on short term targets at the expense of long term objectives.

4. Measure fixation – managers focus on measureable outputs when outcomes are tough to assess.

5. Gaming – managers deliberately under-achieve in order to secure a lower target in the next round.

6. Misrepresentation – managers mis-report or distort data to create a good impression.

7. Ossification – managers use indicators that are no useful but cannot be bothers to revise or remove it.

(Ralph Smith, 1995)
Learning without accountability

“We’re lost, but we’re making good time!”

Yogi Berra

PictureQuotes.com

Good luck 45 M.P.H.

Cslacker.com
Weaving together Accountability & Learning in a New Way

1. Sustained progress on desired outcomes.
2. Fidelity to key principles and commitments.
3. Employing robust tracking and learning processes.
4. Data informed adaptation of goals, targets, strategies and implementation arrangements.
Bringing it home
The Big Idea: Housing First

**Typical “Housing Readiness”**

- Homeless
- Shelter
- Transition

**Fail Points**

- Medical
- Behavioral
- Mental

- Income
- Landlord Relationship

**Permanent**

**Housing First**

- Homeless
- Permanent
  - Medical
  - Behavioral
  - Mental
  - Income
  - Landlord Relationship

**Life Stability**
We can end homelessness in Calgary.

By January 29, 2018, an individual or family will stay in an emergency shelter or sleep outside for no longer than one week before moving into a safe, decent, affordable home with the support needed to sustain it.

Our goal is within re
End of 2016

**HOW MANY?**

3222 people were counted as experiencing homelessness in Calgary. Calgary has seen a decrease of approximately 11% in homelessness since the peak in 2008.

Due to changes over time in methodology, comparisons between counts should be made with caution.

**WHERE?**

Calgary homeless numbers drop 11 percent in latest head count but affordable housing still out of reach.
Measurement Surfaces New Learning & Accountability Issues

Context
- Booming economy
- Population grows by 20%
- Vacancy rate is 1%, rents increase by 30%, city loses 10,000 rental units lost to condo conversions.
- Shelters at 100% capacity
- Major flood disrupted housing for many vulnerable residents

Strategy
- Housing First Participants unable to achieve ‘self-sufficiency’ within a year due to complexity of challenges – the standard is too high for many.
- Housing First is ‘necessary’ downstream strategy, but it needs a complementary upstream strategy
- Strategy cannot keep pace with the boom

Implementation
- Province releases less 20% of funds for new housing starts due to political & admin issues
- Many agencies resentful of control of funders exclusive focus on one strategy & fatigued with sustained push
- Difficulty in expanding affordable housing units across city due to NIMBY
We are still committed to our target of ending homelessness in ten year ... however, at this pace, its going to take 30 years.

Tim Richter, Canadian Alliance to End Homelessness
Closing
Collective Impact & Shared Measurement: Five Emerging Principles

1. Be certain about the outcomes you want to achieve before you commit ‘heavy’ to developing shared measurement systems.
2. Distinguish between shared outcomes, shared measures and shared measurement.
3. Embed shared measurement process into effective learning & decision-making processes.
4. Employ an agile versus ‘big design up front’ approach to development.
5. Balance the use of shared measurement for learning and accountability.
Getting [people] to taste evaluation and measurement may, indeed, be a long shot in many situations. Many people have been made sick by past concoctions called evaluation.

Each evaluation being a blend of unique ingredients, no standardized recipe can ensure the outcome. We have only principles, premises and utilization focused processes to guide us, and we have much to learn.

But the potential benefits merit the efforts and risks involved. At stake is the vision of an Experimenting Society. The only way to find out is to try it – and evaluate the results.