

# THE COLLECTIVE IMPACT TOOLKIT

*A collection of tools designed to help launch and sustain your Collective Impact initiative*

**JUSTIN MIKLAS**  
RESULTS LEADERSHIP GROUP

Powered by



© Copyright 2013



**W**elcome to the **Collective Impact Toolkit** – a collection of tools designed to help you launch and sustain your Collective Impact initiative. If you are reading this, our assumption is that you are already familiar with the five conditions of Collective Impact and are looking for a practical way to implement them. If that is not the case, we recommend that you start by reading [Achieving Collective Impact with Results-Based Accountability™](#) by Deitre Epps. There are lots of other resources out there as well, and we've done our best to create a comprehensive list for you at the end of this document (page7).

### Five Conditions of Collective Impact:

- |                                     |               |
|-------------------------------------|---------------|
| 1) A common agenda;                 | <b>Page 2</b> |
| 2) Shared measurement systems;      | <b>Page 3</b> |
| 3) Mutually reinforcing activities; | <b>Page 4</b> |
| 4) Continuous communication;        | <b>Page 5</b> |
| 5) A backbone support organization  | <b>Page 6</b> |

The tools described in this document are all part of the [Results Scorecard 3.0](#) software – a data and collaboration tool designed specifically for non-profit and government organizations. With it, community partners and their backbone support organizations can organize around a common agenda, define means to measure progress, share data, and use information to drive their strategies and activities. For those that need a hand getting to this step, Results Scorecard 3.0 also includes tutorials and others capacity building tools to ensure that users of all experience levels are able to participate. If you are unfamiliar with the concepts of Results-Based Accountability™, we recommend checking out the [RBA Guide for Facilitators and Leaders](#) for an explanation of the terms and concepts.

### Preliminary Resources

- ✓ *Achieving Collective Impact...*  
<http://resultsleadership.org/achieving-collective-impact-with-results-based-accountability/>
- ✓ *RBA Guide...*  
<http://resultsleadership.org/results-based-accountability-rba-guide-for-facilitators-and-leaders/>
- ✓ *Results Scorecard 3.0*  
<http://www.ResultsScorecard.com>

## Condition #1: A Common Agenda

The use of population Results and Indicators provides a clear, practical and measurable way of articulating a common agenda for a community. The tools below can help you to define your agenda, communicate it to your partners, and monitor ongoing progress.



### Virtual Facilitator: Population Results and Indicators Tutorial

#### R Population Result and Indicator Tutorial

Getting Started    Result Statements    Result Selection    Select Indicators    Define Indicators

#### Getting Started

It doesn't matter where you start. Start anywhere. Start where the passion is. Whatever you do will have beneficial effects across a range of Results.

As a first step, what set of statements captures the most important hopes for our children, families, community, city, county, state, or nation? Complete the sentences below with adjectives descriptive of well-being.



#### Population

#### Scorecards

Existing Scorecard

#### Statements

Statement

Eg: We want families who are...



Eg: We want children who are...



Eg: We want youth who are...



The **RS3.0 Virtual Facilitator**, featuring a special video series led by Mark Friedman (author of *Trying Hard is Not Good Enough*), guides new users through each step of the RBA process. The **Population Results and Indicators tutorial** helps users define the population Results they are seeking to achieve and choose Indicators to monitor them.



### Interactive Scoreboard: Common Agenda Scorecard

#### Common Agenda Scorecard

This scorecard displays the status of early childhood development indicators and performance measures for the city of Indianapolis.

R	EC	Result 1: All Babies are Born Healthy	Time Period	Actual Value	Target Value	Current Trend	Baseline % Change
	I	EC Births to mothers 17 years old or younger (rate/1000)	2015	1.85	5.00	↗	2 -54%
	I	EC Births to mothers 17 years old or younger (rate/1000)	2014	1.60	5.00	↗	1 -60%
	I	EC Births to mothers 17 years old or younger (rate/1000)	2013	1.50	4.00	↘	2 -63%
	I	EC Births to mothers 17 years old or younger (rate/1000)	2012	4.00	5.00	↘	1 0%
	I	EC Births to mothers 17 years old or younger (rate/1000)	2011	6.80	5.00	↗	2 70%
	I	EC Births to mothers 17 years old or younger (rate/1000)	2010	6.73	5.00	↗	1 68%
	I	EC Births to mothers 17 years old or younger (rate/1000)	2009	6.20	5.00	↘	1 55%
	I	EC Births to mothers 17 years old or younger (rate/1000)	2007	9.70	5.00	↗	2 143%
	I	EC Births to mothers 17 years old or younger (rate/1000)	2006	5.00	4.00	↗	1 25%
	I	EC Births to mothers 17 years old or younger (rate/1000)	2005	4.00	3.00	→	0 0%
	I	EC % of Mothers beginning prenatal care in first trimester	2015	7.7%	15.0%	↗	5 51%
	I	EC % of Low birth weight babies	2013	2.7%	1.0%	↘	3 -46%
R	EC	Result 2: All Children Enter School Ready to Learn	Time Period	Actual Value	Target Value	Current Trend	Baseline % Change
	I	EC Standardized Test: % of children entering school fully ready to learn	2012	81.0%	100.0%	↗	4 13%
R	MD	Result 3: All Youth Succeed in School	Time Period	Actual Value	Target Value	Current Trend	Baseline % Change
	I	MD High School Graduation Rate	2013	60%	70%	↗	3 20%
	I	MD % of youth that participate in after school activities	2013	98%	100%	↗	2 9%
	I	MD % of youth performing on grade level or above	2013	82%	80%	↗	3 17%

Whether your community is focused on one result and indicator or numerous, **the Interactive Scoreboard** in RS3.0 can help you to define the Common Agenda that you and your partners are passionate about and monitor progress over time.

## Condition #2: Shared Measurement Systems

Defining performance measures for each community partner that clearly align with the Common Agenda (Population Results and Indicators) provides the information needed to make decisions and revise strategies going forward. The tools below can help you to define the performance measures for each partner and monitor on-going progress.



### Virtual Facilitator: Program Performance Measure Tutorial

#### Program Performance Measure Tutorial

Getting Started    How Much?    How Well?    **Better Off?**    Headline Selection

#### Better Off?

Ask "In what ways are your clients better off as a result of getting the service in question? How would we know, in measurable terms, if they were better off?" Create pairs of measures (# and %) for each answer. Four categories cover most of this territory: skills/knowledge, attitude, behavior, and circumstances (e.g., a child succeeding in first grade or a parent fully employed). Consider all of these categories in developing measures of whether clients are better off. Examples are: #/% of child abuse/neglect cases that have repeat child abuse/neglect; #/% of road miles in top-rated condition; #/% of cited water quality offenders who fully comply; #/% of repeat audit findings.



#### Program Details:

Program Name: ABC After School Program

Effort

Effect

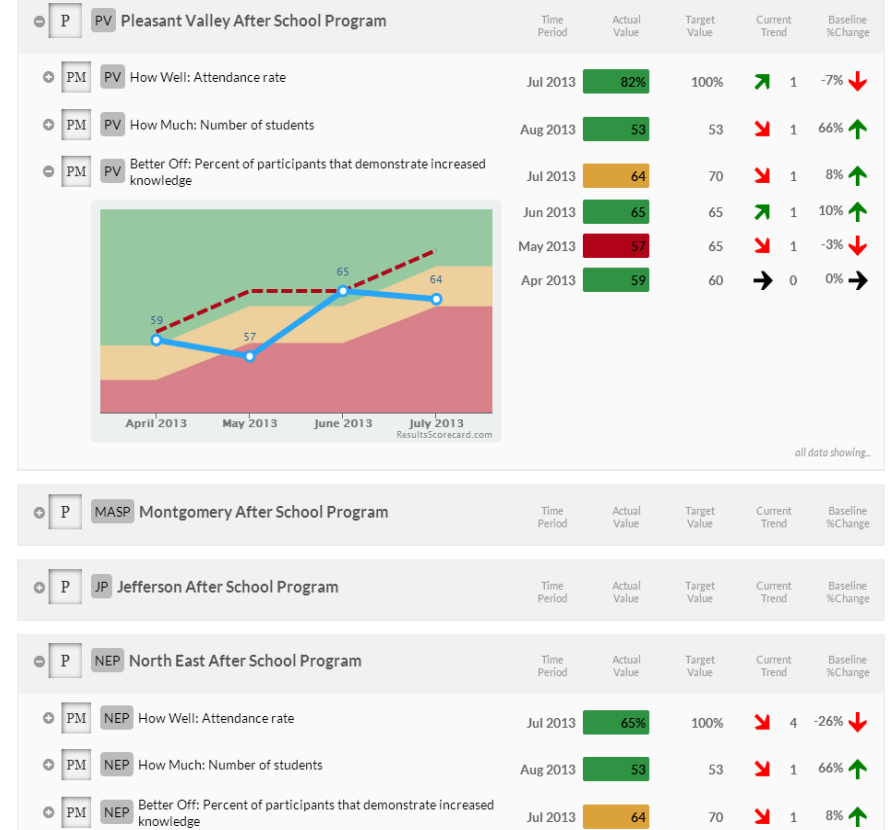
Quantity	How much do you do? - # (Q1)	How well do you do? - % (Q2)
	o Number of students	o Student to teacher ratio
Quality	Is anyone better off? - # (Q3) <span>Add Statement</span>	Is anyone better off? - % (Q4) <span>Add Statement</span>
	# of students with improved grades <span>x</span>	% of students with improved grades <span>x</span>
	Type statement here... <span>x</span>	Type statement here... <span>x</span>
	Type statement here... <span>x</span>	Type statement here... <span>x</span>

The **Program Performance Measure Tutorial**, part of the RS3.0 Virtual Facilitator, helps each community partner define its role in the Common Agenda and select measures to monitor its performance.



### Interactive Scoreboard: Program Performance Scorecard

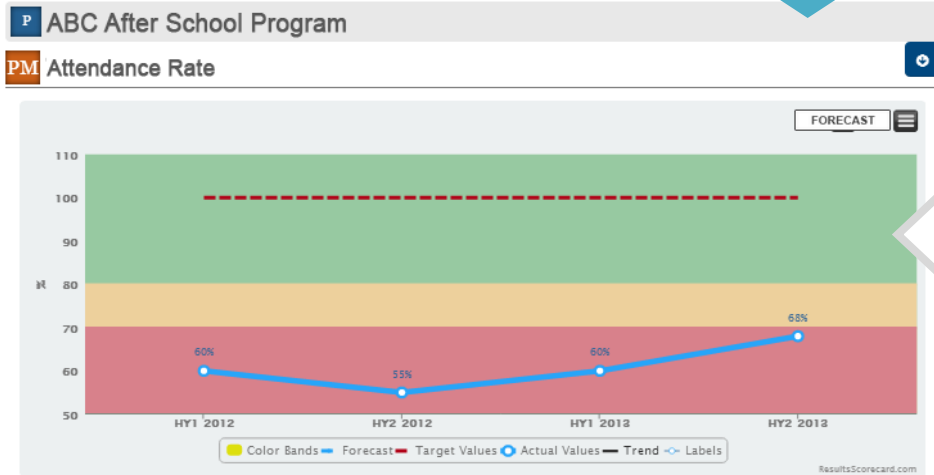
#### Program Performance Scorecard



From small local collaborations to large national initiatives and everywhere in between – the **RS3.0 Interactive Scoreboard** can organize your program performance data and analyses to ensure that the information you need to make decisions is never more than a few clicks away. Zoom out to see how the partnership is performing as a whole, or zoom in to focus on the performance of any individual program.



## Turn the Curve Template



Show Data Values

### Story Behind the Curve



In this section, list the key factors underlying the historic baseline and forecast for the indicator or performance measure. Identify: (1) contributing factors that are supporting progress and (2) restricting factors that are hindering progress. Progress is defined as turning the curve of the baseline (or accelerating the curve if it is already headed in the right direction).

### Partners

Identify potential partners, including current ones, who may have a role to play in improving progress. The identification of root causes impacting progress will often point the way to the types of partners who should be engaged.

The best format is to bullet each partner with a short description of their role.

### What Works

Before selecting a strategy or action plan to undertake to turn the curve of the baseline, it is necessary to determine whether what would work to turn the curve is known. And it is important to be sure to explore the full range of options for strategies or action plans. A strategy or action plan may, of course, involve the discontinuation of existing activities as well as the implementation of new ones. And in most cases a strategy or action plan should be multi-year and integrated. The following are criteria to consider in developing options:

- Does the option address one or more of the root causes you have identified?
- Is the proposed option evidence-based?
- Have "no-cost/low-cost" options been developed?
- Is additional research necessary to determine what would work or to identify other options?

### Action Plan

Selecting the proposed strategy or action plan involves applying four criteria to each of the options: leverage, feasibility (or reach), specificity, and values.

- Leverage:** How strongly will the proposed strategy or action impact progress as measured by the baselines?
- Feasibility (or reach):** Is the proposed strategy or action plan feasible? Can it be done?
- Specificity:** Is the strategy or action plan specific enough to be implemented? Is there a timeline with deliverables that answers the questions: Who? What? When? Where? How?
- Values:** Is the strategy consistent with the values of the community and/or agency?

Once elements of the proposed strategy or action plan are selected, list them in order of priority. The best format is a "bullet" for each element which provides a brief header that is underlined and a brief description of the element. The specificity of your action plan can be outlined in the Actions on the Turn the Curve Template.

## Condition #3: Mutually Reinforcing Activities

Collecting data is only half the battle. The tools below can help you to use data to make decisions and guide your strategies to improve.

The **RS3.0 Turn the Curve** template guides users through a data-driven decision making process that leads to the development of strategies and actions that can be assigned to specific people/partners. Capture analysis, document meetings, define your strategies and define the actions to implement them all in one easy-to-use interactive tool.



## Action Manager

Specific Actions	Assigned To	Status	Due Date
A Research funding options	Justin Miklas	On Track	2013-10-25
A Submit grant application	Product Demonstration	On Track	2013-10-30
A Create parent satisfaction survey	Marybeth Onyeukwu	Ahead of Schedule	2013-11-05
A Complete Turn the Curve exercise with staff	MaryEllen Venzke	Completed	2013-10-16
A <input type="text" value="Enter Name here"/>	Unassigned	On Track	mm/dd/yyyy

[New Action](#) [Existing Action](#)

### File Attachments

[Upload Files](#)

File Name	
RDRGrant_Application.docx	
Meeting Notes_10-12.docx	
Monthly Call Notes-8_31_1.docx	

Once you've defined your strategy, use the **RS3.0 Action Manager** to assign specific tasks to the users who will be responsible for them. Establish due dates and monitor progress as users complete each action to add an element of personal accountability to the implementation of your strategy.

## Condition #4: Continuous Communication

Communication, not just between partners but also with funders and the public, is a key component to any successful Collective Impact initiative. The tools below can help you provide real-time, transparent communication to stakeholders, funders and/or the public with just a few clicks of the mouse.



### Embedded Scorecards

The screenshot shows the LIVE UNITED website interface. At the top, there's a navigation bar with 'HOME', 'ABOUT', 'PARTNERS', 'CAMPAIGN', 'LEADERSHIP GROUPS', and 'RECOGNITION REGISTRY'. A search bar is present. The main content area is titled 'HELPING OUR STUDENTS SUCCEED' and features a section for 'Early Grade Success'. A table displays performance metrics for various programs, including 'Education: All youth are ready for college, work and life' and 'Percent of Youth that graduate from high school on time'. A line graph shows the trend for 'Percent of Youth that graduate from high school on time' from FY 2009 to FY 2015. The graph shows a steady increase from 88.2% in FY 2009 to 90.0% in FY 2012, with a slight dip in FY 2011 and FY 2013.

Program	Time Period	Actual Value	Current Trend	Baseline %Change
Education: All youth are ready for college, work and life	FY 2012	90.0%	1	4%
	FY 2011	88.2%	2	2%
	FY 2010	89.3%	3	3%
	FY 2009	86.2%	1	0%
	FY 2008	83.4%	2	-4%
	FY 2007	86.9%	1	0%
	FY 2006	91.1%	1	5%
	FY 2005	88.6%	1	2%
	FY 2004	89.6%	4	4%
	FY 2003	88.1%	3	2%

Provide complete transparency and accountability to funders and the public by embedding elements from Results Scorecard into your website or sharing them on social media. Shared/Embedded elements are automatically updated in real-time so you can quickly and easily provide an ongoing, up-to-date stream of information to those that need it.



### Shared Scorecards

#### Program Performance Scorecard

The screenshot shows a 'Program Performance Scorecard' interface. It lists several programs with their performance metrics. A Facebook share overlay is visible, showing the URL 'https://www.facebook.com/sharer/sharer.php?u=https://app.resultscorecard.com/Scorecard/Embed/3624' and the text 'We are making great improvement!'. The share overlay also includes a 'Share Link' button and a 'Cancel' button.

Program	Time Period	Actual Value	Target Value	Current Trend	Baseline %Change
PV Pleasant Valley After School Program	Jul 2013	82%	100%	1	-7%
PV How Well: Attendance rate	Aug 2013	53	53	1	66%
PV How Much: Number of students					
PV Better Off: Percent of participants that demonstrate increased knowledge					
MASP Montgomery					
MASP How Well: Att					
MASP How Much: N					
MASP Better Off: Pe					
MASP Increased kno					
JP Jefferson After					
JP How Well: Attend					
JP How Much: Numb					
JP Better Off: Perce					
JP Increased knowl					
NEP North East After School Program	Jul 2013	65%	100%	4	-26%
NEP How Well: Attendance rate					

Quickly Share Scorecards and Turn the Curve reports via email or on Facebook, LinkedIn, Google+ or Twitter with just a few clicks of the mouse.



## RBA Virtual Facilitator

### Virtual RBA Facilitator

My name is Mark Friedman and years ago I created the Results Based Accountability framework to help communities and organizations be more effective through using simple language and accountability techniques. Throughout the Results Scorecard software you will have the opportunity to use RBA Workshops that will guide you through the steps of defining results, turning the curve on population indicators, planning successful strategies, and much more. These virtual tutorials have been derived from on-site work I, and many other consultants, have done over the past years with countless organizations in an effort to better share our knowledge and techniques with more people at a lower cost.



### Virtual Workshops

#### Population Result and Indicator Tutorial

This workshop will help you define the population Results you are seeking to achieve and choose the Indicators to monitor your Results. Then you have the chance to place the Results on Scorecards.

**What you should have on hand:**

- ▶ Cooperative team of planners
- ▶ Initial list of possible indicators available in your area

**Estimated completion time:** 10-30 minutes

Get Started

#### Program Performance Measure Tutorial

The Program Workshop will walk you through the steps of identifying and describing the Programs that are working to achieve your Population Results. Once you have defined the Program this workshop will also walk you through the Performance Measure selection process.

**What you should have on hand:**

- ▶ Cooperative team of planners
- ▶ List of Results you are identifying programs for
- ▶ List of Programs you would like to track performance for

**Estimated completion time:** 20-50 minutes

Get Started

#### Turn the Curve Tutorial

In this workshop you will create/select an Indicator or Performance Measure that you want to analyze and create a plan to change for the better.

**What you should have on hand:**

- ▶ Historical Indicator Data (if available)
- ▶ Community partner list

**Estimated completion time:** 15-45 minutes

Get Started

## Condition #5:

### A Backbone Support Organization

A backbone organization provides the supporting infrastructure for a Collective Impact effort and is a facilitator of a highly structured data-driven decision making process. The Results-Based Accountability™ framework, as defined by Mark Friedman in the book, "Trying Hard is Not Good Enough," provides a simple but rigorous process for Backbone Support Organizations to align the efforts of the collaborative group.

The RBA Virtual Facilitator in Results Scorecard 3.0 provides a scalable set of tools designed to build your community's capacity and reduce the need for ongoing consultant support to create your common agenda (Result and Indicator Tutorial), shared measurement system (Performance Measure Tutorial) and mutually reinforcing activities (Turn the Curve Tutorial.)



For more information on the tools described in this document, or to begin a **30 day free trial**, please visit: [www.ResultsScorecard.com](http://www.ResultsScorecard.com)

**Or contact the Results Leadership Group:**

Justin Miklas  
Director of Business Development  
[justin@resultsleadership.org](mailto:justin@resultsleadership.org)  
(240)731-7210



### Additional Collective Impact Resources

- ✓ **Achieving Collective Impact with Results-Based Accountability™** - Results Leadership Group, LLC, Deitre Epps, Author  
<http://resultsleadership.org/achieving-collective-impact-with-results-based-accountability/>
- ✓ **FSG Resources** – A compilation of Collective Impact links from the Foundation Strategy Group  
<http://resultsleadership.org/fsg-collective-impact-resources/>
- ✓ **Trying Hard is Not Good Enough** - Mark Friedman  
<http://resultsleadership.org/product/trying-hard-is-not-good-enough-by-mark-friedman/>
- ✓ **The Holy Grail of Public Leadership** - Adam Luecking  
<http://resultsleadership.org/product/the-holy-grail-of-public-leadership/>
- ✓ **Results Scorecard and Collective Impact (5 Minute Video)** - Results Leadership Group, LLC, Adam Luecking, Presenter  
<http://resultsleadership.org/results-scorecard-and-collective-impact-in-the-united-states/>
- ✓ **Collective Impact Readiness Assessments** - Wholonomy Consulting, LLC  
[http://www.wholonomyconsulting.com/PDF/Collective\\_Impact\\_Readiness\\_Assessment\\_October10.pdf](http://www.wholonomyconsulting.com/PDF/Collective_Impact_Readiness_Assessment_October10.pdf)
- ✓ **Description of Partner Mapping Process** - Wholonomy Consulting, LLC  
[http://www.wholonomyconsulting.com/PDF/Collective\\_Impact\\_Toolkit\\_Part1.pdf](http://www.wholonomyconsulting.com/PDF/Collective_Impact_Toolkit_Part1.pdf)
- ✓ **Partner Mapping Forms and Tools** - Wholonomy Consulting, LLC  
<https://www.ideaencore.com/item/building-capacity-collective-impact%E2%80%94strategy-1-partner-mapping-part-2-forms-and-tools>
- ✓ **Results-Based Memorandum of Understanding** - Results Leadership Group, LLC  
<http://resultsleadership.org/sample-results-based-partnership-agreement-or-mou-for-collective-impact-and-place-based-initiatives/>
- ✓ **Needle-Moving Collective Impact: Three Guides to Creating an Effective Community Collaborative** - The Bridgespan Group  
<http://www.bridgespan.org/Publications-and-Tools/Revitalizing-Communities/Community-Collaboratives/Needle-Moving-Collective-Impact-Three-Guides-to-Cr.aspx#.UkhvwoZ1zU>