



Resource Brief:

Goals and Metrics— Gathering Evidence for Success



Overview

The NSF INCLUDES program emphasizes the five elements of Collaborative Infrastructure: Vision; Partnerships; Goals and Metrics; Leadership and Communication; and Expansion, Sustainability, and Scale. The five elements are essential and intertwined components for planning projects focused on broadening participation in STEM. Two virtual events hosted by the NSF INCLUDES Coordination Hub on [Collaborative Infrastructure](#) and [Goals and Metrics](#) further explore these concepts.¹

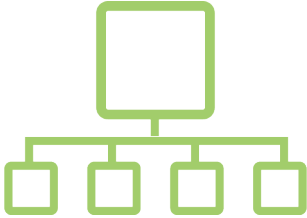
“Goals and Metrics” refers to the planning and processes needed to gather evidence to demonstrate a project’s success. As you think about processes related to visioning and planning that typically occur during a project’s start-up phase but should be revisited throughout a project’s cycle, review the topics we have included in this brief to help you plan the steps. This is not an exhaustive list but rather a prioritization of topics identified by Network members.

The resources included in this brief are presented in seven sections which include:

- **Equity and disaggregating data**
- **Deciding what to measure**
- **Developing data sharing agreements**
- **Building data capacity and effective data use**
- **Developing a data collection plan**
- **Developing an implementation plan**
- **Data visualization**

¹ The resources on Collaborative Infrastructure, Goals and Metrics, and several other resources in this brief are located in the NSF INCLUDES National Network online community (<https://www.includesnetwork.org/>). You must log in or create an account to access these resources.

Equity and Disaggregating Data



At every phase of project, partners must have a culturally responsive program design, implementation, and evaluative practices, and document evidence of success and opportunities for improvement for the populations that they serve. This often involves planning with the results in mind and being thoughtful about disaggregating data before it is even collected.

If you are looking for questions and practical tips on presenting disaggregated data, the Race Matters Institute's blog post, [The Essentials of Disaggregated Data for Advancing Racial Equity](#), walks through common questions and issues around disaggregating data.

The National Forum on Education Statistics' [Guide to Collecting and Using Disaggregated Data on Racial/ Ethnic Subgroups](#) outlines why data disaggregation is important, describes strategies for disaggregating data, and provides several case studies showing what data disaggregation looks like in real communities.

Deciding What to Measure

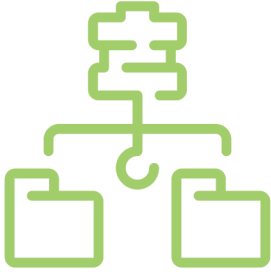


This tool has a quick self-assessment to gauge what you are already measuring and prompts users to consider what additional data may be needed to support their project's goals. The Ready by 21 [Better Data Toolkit](#) provides several group activities and worksheets designed to create valuable discussions among project partners as they decide what metrics they want to use for data-driven decision making.

Need a tool to brainstorm the indicators and measures needed to monitor a project's progress in achieving its goals? Review the [Shared Measurement Mapping Tool](#) from the Tamarack Institute .

If you are looking for help in determining which indicators to use, the Collective Impact Forum's [Work Group Reporting Template](#) provides a framework for workgroups to think about key data points to assist with selecting shared measurement indicators.

Developing Data Sharing Agreements



As you start to think about how to share data across partners, the [Partner Engagement blog post](#) from nFocus Solutions' Community Data-Sharing 101 blog series offers five key considerations before developing data-sharing agreements with project partners. Other helpful posts are [Demystifying the Data-Sharing Agreement](#) and the [Data-Sharing Agreement as a Living Document](#).

Designing a data sharing agreement and data security plan go hand in hand. The [Data Security Checklist](#) from The U.S. Department of Education's Privacy Technical Assistance Center (PTAC) can help you design a data security plan. Chapter Two of the [Resource Guide to Data Governance and Security](#) (developed by the National Neighborhood Indicators Partnership or NNIP) provides a comprehensive review of considerations when developing data-sharing agreements while Chapter Three offers several resources for creating data security plans.

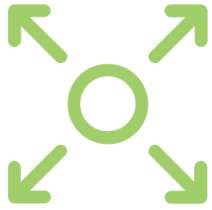
If you are looking for resources to help implement data partnerships, particularly with schools and community partners, review the resource [Data Drives School-Community Collaboration: 7 Principles for Effective Data Sharing](#) developed by Strive Together, in partnership with the Data Quality Campaign.

5 Considerations for Developing Data-Sharing Agreements

- 1 Remember to see things from your prospective partner's point of view.
- 2 What's in it for me?
- 3 Don't just talk. Listen.
- 4 Don't just talk and listen – communicate.
- 5 We've only just begun.

Source: nFocus Solutions

Building Data Capacity and Effective Data Use



You can explore rubrics for promoting data use and for sharing and connecting around data through [The Strive Together Data Maturity Model](#) which summarizes the experience of more than 39 network members from Strive Together, a national network of organizations focused on education from cradle to career.

The report [Connecting the Dots: Data Use in Afterschool Systems](#) includes several best practices and recommendations for building data capacity both at system-level and staff-level. It highlights critical strategies for promoting effective data use and building capacity on data systems, including coordinating among leadership, setting early norms and routines, engaging those with technological expertise and maintaining strong partnerships. This is based on information gathered from nine cities participating in the Next Generation Afterschool System-Building Initiative, a multi-year effort to strengthen afterschool systems for low-income youth.

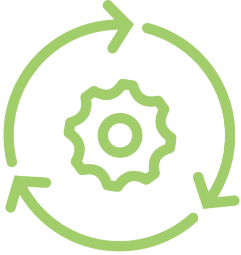
Developing a Data Collection Plan



To help you determine a data-driven feedback loop to determine the feasibility of collecting specific types of data, the [Data Inventory tool](#) developed by Living Cities helps you track important components for all data that will provide evidence for your outcomes. The prompts provided in this tool help you think through everything you need to develop an initial data collection plan.

Are you considering how and where you will store your data? You can find information in the Urban Institute's research report, [Navigating Performance Management Software Options](#). While this guide is focused on performance management, much of the content is relevant to all measurement planning; particularly the sections to decide when an external system is necessary, system costs, and implementing the system in the field.

Developing an Implementation Plan



Planning tips, tools and templates and lessons learned from work in Boston and Omaha to develop a plan for measuring goals across project partners can be found in a resource by nFocus Solutions, [Collective Ideas to Collective Impact: A Guide to Data Collaboration in Communities](#).

The Collective Impact Forum’s blog post, [Collective Impact Principles of Practice: Putting Collective Impact into Action](#), highlights some important principles of practice that lend themselves to the successful implementation of the elements of Collective Impact. As noted in the blog, “the field’s understanding of what it takes to put the collective impact approach into practice continues to evolve...” The eight tips offered here (and listed below) are a good place to start.

Collective Impact Principles of Practice: Putting Collective Impact into Action

- 1 Design and implement the initiative with a priority placed on equity.
- 2 Include community members in the collaborative.
- 3 Recruit and co-create with cross-sector partners.
- 4 Use data to continuously learn, adapt, and improve.
- 5 Cultivate leaders with unique system leadership skills.
- 6 Focus on program and system strategies.
- 7 Build a culture that fosters relationships, trust, and respect across participants.
- 8 Customize for local context.

Source: Collective Impact Forum

Data Visualization



Living Cities' [Using Data for Collective Impact Series](#) introduces key skills and data visualization tools/platforms needed to effectively present your data in more digestible and actionable ways. Several examples demonstrate how the effective use of simple but powerful visual forms, such as infographics and maps, can help individuals absorb data better and elicit organizational behavioral change.

You can find visual and dashboard examples in the Collective Impact Forum's virtual coffee, [Using Data and Shared Measurement in Collective Impact](#), created by Home for Good, an initiative that works collaboratively on systems and solutions to end homelessness. Examples from the [Homelessness Data Dashboards](#) page include a variety of effective data visualizations to show the impact of their efforts to end homelessness throughout the Los Angeles County. The visualizations were developed mainly using [Tableau](#) and [Microsoft Power BI](#), two powerful tools used by many collaborative partnerships.