The Role of Shared Measurement in Collaborations and its Effective Implementation – What Have We Learned Thus Far?

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Presented at the Association for Public Policy Analysis and Management (APPAM) Conference "Collaboration among Government, Market, and Society: Forging Partnerships and Encouraging Competition" in Shanghai, China.

May 2013

Abstract

Performance management and accountability in collaborations are very much intertwined with the nascent concept of shared measurement, which is of growing interest in the professional literature. Shared measurement in a collaborative setting is conducted by a number of organizations, from the same or different sectors, that address a shared challenge.

Shared measurement can make a significant contribution to the success of collaborations. It contributes to greater alignment of multi-organizational strategies and goals, and promotes collaborative problem-solving and learning.

Drawing on the published and grey literature, this paper: examines the role of shared measurement; explores the unique benefits and challenges of shared measurement in collaborations; and discusses initial lessons for successful implementation.

1. Introduction

Outcome-oriented thinking and outcome measurement are increasingly becoming routine for governmental and non-governmental organizations. This development reflects the increasing demands of governments, private funders, the professional literature, and the general public for better information about the effectiveness of public services and for the use of evidence-based practices and management. This shift also reflects the growing demand for transparency and accountability in public services (Elster, Habib, and Sabah 2010).

An important development is the growing attempts to institute systems of common measures and to pursue shared measurement. This is in part stimulated by efforts to promote inter-organizational and inter-sectoral cooperation in the pursuit of public goals (Kramer, Parkhurst, and Vaidyanathan 2009; Walker, Farley, and Polin 2012; Agostino 2012; Lynch-Cerullo and Cooney 2011).

There are numerous terms used in relation to shared measurement. Some of the more prevalent ones are: shared measurement; shared outcomes; outcome banks; shared outcome frameworks; common indicators; and common measures (Kramer, Parkhurst, and Vaidyanathan 2009; Walker, Farley, and Polin 2012; Sanfilippo and Chambers 2007; Broeckling 2010; Hanleybrown 2011; Lampkin et al. 2006; Rockefeller Philanthropy Advisors 2012).

We feel it is important to distinguish between two main contexts:

a. **Common measures:** an infrastructure to support measurement that includes a menu of definitions for outcomes, outcome indicators and tools to collect the data. It can be used by organizations working to achieve similar or shared goals, whether separately or together in a defined social area.

b. **Shared measurement:** a collaborative measurement process conducted among a number of organizations engaged in a defined social area and working to achieve similar or shared goals (Kramer, Parkhurst, and Vaidyanathan 2009). At times, in more complex organizations, shared measurement can refer to measurement carried out cooperatively by several units or divisions within the same organization.
Shared measurement includes the joint definition of common goals and measures, an agreed measurement process, the sharing of measurement findings, and may also include engagement in collaborative analysis and learning**.**

Common measures can be used separately by organizations that do not cooperate at all. Shared measurement, on the other hand, requires cooperation between organizations, at least in the measurement domain (Kramer, Parkhurst, and Vaidyanathan 2009; Bayfield et al. 2004; Taylor et al. 2011; Marco and Umit 2006).

Therefore, while every process of shared measurement includes an agreement on common measures, not every process of developing common measures includes shared measurement (Kramer, Parkhurst, and Vaidyanathan 2009; Marco and Umit 2006; Knutsson, Ramberg, and Tagesson 2012). Thus, the distinction between these two contexts is important, although the literature often uses them interchangeably.

This article focuses on shared measurement in collaborative settings in which organizations join together to purse some common goal.

It is important to note in this regard, that shared measurement efforts are not a new phenomenon and have been taking place in different forms and contexts. At the same time, the efforts to distill a conceptual framework for shared measurement in collaborative settings are gaining a more prominent place in recent years. This trend is even more prevalent in relation to the growing efforts to promote inter-sectoral collaboration (Kramer, Parkhurst, and Vaidyanathan 2009;

Auspos and Kubisch 2012; Agostino 2012; Moynihan et al. 2011; Ní Ógáin, Svistak, and de Las Casas 2013; Isett et al. 2011; Behn 2010).

Some prominent, mostly multi-sectoral, examples in the literature on shared measurement include: the U.S. based Strive Partnership for education and the Magnolia Place Community Initiative; the Canadian based Vibrant Communities and Calgary's 10-Year Plan to End Homelessness; the U.K. based Childhood Bereavement Network (CBN) and the national charity Coordinated Action Against Domestic Abuse (CAADA); and the Northern Ireland based Children and Young People's Strategic Partnership (CYPSP) (Kramer, Parkhurst, and Vaidyanathan 2009; Ní Ógáin, Svistak, and de Las Casas 2013; Atkinson and Maxwell 2007; Hanleybrown, Kania and Kramer 2012; Kania and Kramer 2013).

This article draws from the literature on measurement and evaluation in the context of public and multi-sector collaborations, including the growing literature on the nascent concept of "collective impact" which focuses prominently on shared measurement (Kania and Kramer 2011).

It should be noted that, despite its recognized importance, there has been limited empirical examination of the role of shared measurement in cooperative frameworks. However, the research that does exist documents important examples and provides us with insights into the potential benefits and challenges of shared measurement in cooperative frameworks (Knutsson, Ramberg, and Tagesson 2012; Auspos and Kubisch 2012; Agostino 2012; Moynihan et al. 2011; De Bruijn 2007; Koppenjan 2008; McGuire and Agranoff 2011; Provan and Milward 2001; Kenis and Provan 2009; Babiak 2009; Provan and Sydow 2008).

Finally, it is important to emphasize that these concepts can apply both to measurement carried out by an external evaluator who is contracted for a limited period of time or to measurement that is implemented through the establishment of a more internal infrastructure for ongoing measurement. Most of the recent literature, as well as this paper, focuses more on the latter.

In the next section of this article, we further elaborate on the concept of shared measurement and then explore its benefits. We then analyze the special challenges that arise in implementing shared measurement, as well as some of the initial lessons that are emerging from recent experience.

2. What is "Shared" in Shared Measurement Efforts

Measurement efforts include a number of stages. The extent of cooperation among the organizations in each stage may differ.

Stage 1: Planning the Measurement System

An essential first step in shared measurement processes is to agree on common measures. Common measures can be adopted from a set of standard measures available in the literature or may be compiled and developed by the partner organizations themselves for their specific use (Kramer, Parkhurst, and Vaidyanathan 2009; Walker, Farley, and Polin 2012; Marco and Umit 2006).

Measurement systems usually address three basic elements: the desired change one wishes to achieve (outcomes), the activities implemented in order to achieve the outcomes (outputs), and the resources invested in these activities (inputs) (Elster, Habib, and Sabah 2010; Walker, Farley, and Polin 2012).

In the literature, the emphasis is on the common measures of outcomes. The outcomes will reflect the goals of the collaboration, and can include outcomes at the level of the clients/population and outcomes at the level of the organization/system (Walker, Farley, and Polin 2012; Ní Ógáin, Svistak, and de Las Casas 2013; the Scottish Government 2010).

In many cases it is also useful to distinguish between intermediate and final outcomes. Intermediate outcomes constitute a major step towards the obtainment of a final outcome, but are not important in and of themselves. They can refer to changes at the client level or at the organization level. Final outcomes are important in themselves and not merely as leading to something else. Usually they will refer to the level of the client (Elster, Habib, and Sabah 2010; Walker, Farley, and Polin 2012).

In this regard, it is important distinguish between two measurement tasks:

  a. The measurement of the achievement of the shared goals.
  b. The measurement of the characteristics and quality of the collaboration itself.

Thus, in some cases, the cooperating organizations will also choose to define intermediate outcomes that relate to the collaborative effort itself (e.g., trust among partners, level of coordination) and/or outcomes that relate to the desired influence of the cooperation on the

partner organizations (e.g., greater efficiency, improved knowledge) (Taylor et al. 2011; Austin and Seitanidi 2012; Page 2004).

Systems of shared measurement will usually also relate to the measurement of outputs and inputs (Kramer, Parkhurst, and Vaidyanathan 2009; Hanleybrown 2011; Marco and Umit 2006; Wolfus et al. 2011).

For each and every item in the measurement plan there is a need to define the specific way in which it will be measured (indicator) and the measurement tool and sources that will be used. The plan will therefore relate to several levels: the desired outcomes; what the measurable outcome indicators will be; and what measurement tools will be used. There will also need to be an agreement on the detailed method for collecting the data (Walker, Farley, and Polin 2012).

The final step is to reach agreement on the analysis plan and on the ways in which the findings will be shared (Walker, Farley, and Polin 2012).

There may be cases with more limited cooperation, in which there is agreement on outcomes and outcome indicators, but not necessarily on measurement tools and methodologies. In these cases, the ability to compare the findings among partners will be much more limited.

Stage 2: Implementation of Measurement

Another area for cooperation is in the collection of the data. This can take several forms:

    a. Creation of a shared computerized information system (measurement platform) or agreement on a common entity that collects all the data on behalf of all the partners (Kramer, Parkhurst, and Vaidyanathan 2009; Walker, Farley, and Polin 2012).

    b. Creation of a shared measurement platform where each partner organization collects the data on its own and inputs it into the system (Kramer, Parkhurst, and Vaidyanathan 2009; Walker, Farley, and Polin 2012).

    c. Each partner collects its own data through its own systems, using the agreed upon set of measurement tools, methodologies and protocols (Kramer, Parkhurst, and Vaidyanathan 2009).

The utilization by each organization of its own systems is especially relevant when the integration of a new common platform in multiple organizations is considered too complicated or

when organizations already have a well-developed system of their own that can support shared measurement.

Stage 3: Analyzing the Data and Sharing the Findings

Shared measurement requires some degree of cooperation regarding the analyzing of data and the sharing of findings (Kramer, Parkhurst, and Vaidyanathan 2009; Walker, Farley, and Polin 2012; Ní Ógáin, Svistak, and de Las Casas 2013).

A minimal degree of cooperation would entail each organization analyzing its own data using the shared protocol and reporting on the findings on its own, but sharing them with the others.

At the opposite end, maximal cooperation will comprise the use of a shared database of the raw data and a platform that facilitates integrated analysis and reporting.

Stage 4: Use of Measurement Data

There can also be different degrees of cooperation in the use of the data.

The ultimate processes of collaboration almost inherently imply that there will be shared use of measurement data, which will support a process of mutual discussion, learning and continuous improvement.

This process can help partner organizations understand the perspectives of other organizations regarding the interpretation of measurement data and, in some cases, reach a joint understanding.

When organizations come to a common understanding of the findings, they can coordinate their separate activities in light of this understanding or, when relevant, make collaborative decisions regarding their joint activities (Kramer, Parkhurst, and Vaidyanathan 2009; Walker, Farley, and Polin 2012; Ní Ógáin, Svistak, and de Las Casas 2013).

In weaker forms of cooperation, each organization can decide to draw its own conclusion and engage in efforts to improve its work.

Stage 5: Reporting to Stakeholders and the Public

There can also be different degrees of cooperation in the development of a reporting strategy that relates to timing, audiences, content and reporting vehicle.

In developing this strategy, it is necessary to keep in mind that partner organizations have shared constituencies as well as their own unique constituencies.

The reporting strategy will very much ensue from the nature of the collaboration. In weaker forms of collaboration, which do not include integrative analysis, there is more room for each organization to disseminate its own data.

In stronger collaborations, there would be centralized reporting to the shared constituencies, while each organization can report separately to its own constituency. This approach would be almost imperative in cases where there is an integrative analysis and report.

To sum up, the maximum level of cooperation in shared measurement will include the more extensive cooperation in all five stages, from the planning of the measurement to the reporting of the findings.

3. The Role of Shared Measurement and the Similarity among Organizations

Shared measurement is relevant not only among organizations that are almost identical, but can play various roles depending on the nature of the similarity among the organizations. We can divide the relationship among partners of a collaboration into three main categories:

a. **Programs that do similar things to achieve similar goals**: programs that embrace similar intervention strategies in order to achieve similar goals. For example, programs that aim to improve scholastic achievements through individual after-school scholastic assistance.

b. **Programs that do different things to achieve similar goals**: programs that use alternative intervention strategies in order to achieve similar goals. For example, programs that aim to improve scholastic achievement, one through individual scholastic assistance and the other through group work.

c. **Programs that address different aspects of a complex problem to achieve a common overarching goal**: programs that work on different aspects of a single complex problem, in different ways and with different specific goals, in order to achieve a common overarching goal. The strategies are not alternatives, but are meant to be complementary and work in congruence on different aspects of the same complex problem (Kramer, Parkhurst, and Vaidyanathan 2009; Kania and Kramer 2011; Saz-Carranza and Ospina 2011). For example, in order to improve scholastic achievement, one program works to

enhance knowledge and skills through individual scholastic assistance and the other works to enhance emotional efficacy through counseling and psychological support.

The final outcomes will be similar among programs from the first and second category and thus common measures can be developed for them. However, there will be differences in measures of outputs and intermediate outcomes across the organizations implementing different strategies as in the second and third categories. Common measures for outputs and intermediate outcomes will be more relevant to the programs that are implementing similar strategies.

Programs from the third category will mostly share common measures related to the shared overarching goal.

In light of this distinction, the possible roles of shared measurement will vary between the three program categories.

3.1 Programs that Do Similar Things to Achieve Similar Goals

The possible roles of shared measurement are to:

a. Examine whether the strategy is effective overall.
b. Compare the programs and allow for discussion of the possible reasons that different outcomes were achieved in different programs, e.g., differences in the scope and quality of outputs, differences in population characteristics, differences in the external environment, etc.
c. Aggregate the measurement findings beyond the level of a single program, to the regional level and sometimes to the population level, in order to provide a comprehensive picture of the situation and of the outcomes being achieved.

3.2 Programs that Do Different Things to Achieve Similar Goals

The possible roles of shared measurement are to:

a. Compare the effectiveness of different strategies in achieving the same goal.
b. Examine the extent to which different strategies are successful in different contexts and for populations with different characteristics.
c. Aggregate the measurement findings beyond the level of a single program, to the regional level and sometimes to the population level, in order to provide a comprehensive picture of the situation and of the outcomes being achieved.

3.3 Programs that Address Different Aspects of a Complex Problem to Achieve a Common Overarching Goal

The possible roles of shared measurement are to:

a. Examine the extent to which there is progress in achieving the overarching goals

b. Examine the contribution of each program or type of program toward the achievement of the overarching goal

c. Integrate the information from the different programs on the client level, when they are implemented in the same population. The information can include client characteristics, outputs utilized by each client, and outcomes as measured by each program.

In summary, in all three contexts we are interested in the effectiveness of the strategy being implemented.

In the first case, we can also learn about the extent to which differences in implementation and caseload affect program effectiveness. In the second case, we have a chance to compare the relative effectiveness of different intervention strategies. In the third case, we can see how different sub-goals contribute to an overarching goal.

In Table 1 we summarize the main goals of shared measurement by program category.

Table 1: Main Goals of Shared Measurement by Program Category and Population Served

	Program Category	Goals
1.	Programs that do similar things to achieve similar goals	To examine the extent to which the intervention strategy is effective; aggregate findings beyond the level of a single program
		In similar populations To examine the differences in effectiveness arising from program implementation
		In different populations To examine the effectiveness of the intervention strategy among different populations
2.	Programs that do different things to achieve similar goals	To aggregate findings beyond the level of a single program
		In similar populations To examine the differences in effectiveness arising from differences in strategy
		In different populations To examine the effectiveness of different intervention strategies among different populations
3.	Programs that address different aspects of a complex problem to achieve a common overarching goal	To examine the extent to which there is progress in achieving the overarching goals; examine the contribution of each program to achieving the common goal; integrate information at the client level

4. The Benefits of Shared Measurement

The literature discussing collaborations, partnerships, and networks emphasizes the significance of shared measurement. Some of the recent prominent examples are presented below.

Crosby, Bryson, and Stone argue that:

> Cross-sector collaborations are more likely to be successful when they have an accountability system that tracks inputs, processes, and outcomes; use a variety of methods for gathering, interpreting, and using data; and use a results management system that is built on strong relationships with key political and professional constituencies (2006, 52).

In a study on effective community-based collaborations, the White House Council on Community Solutions and the Bridgespan Group found that "data is central to collaborative work and is the guiding element for collaborative decision-making." These initiatives use shared measurement "to set the agenda and improve over time" (2012, 3).

Walker, Farley, and Polin from the U.S. based Child Trends Public/Private Ventures assert that "collecting and responding to data *together* allows organizations to ensure accountability and to deliver better, more efficient services for clients and communities" (2012, 8).

Williams, of the Charities Evaluation Services, based in the U.K., stresses that shared measurement is important "in order to understand why and how your collaboration is achieving, or failing to achieve, its intended outcomes…. and help you do it better" (2010, 3-6).

Cabaj, of the Tamarack Institute for Community Engagement and Vibrant Communities Canada, states that:

> The benefits for developing workable shared measurements systems appear to significantly outweigh the costs and challenges of doing so… shared measurement systems encourage local organizations to align their efforts on shared outcomes, enable them to collectively track and evaluate their collective progress (or lack of) and offer organizations opportunities to benchmark their results against—and learn from—their peers (2012, 1-4).

New Zealand's Managing for Outcomes Programme Office suggests that in the case of inter-agency collaboration towards a common outcome:

> A carefully thought out monitoring or evaluation plan will ensure that co-operative arrangements are functioning smoothly and that adequate information is being collected to enable an assessment of progress and risks (2004, 9).

The United States Government Accountability Office also found in a review of key considerations for implementing interagency collaborative mechanisms, that outcome measurement and accountability systems are key features of collaborations. These systems, which include: "clearly defined outcomes and a way to track and monitor progress," offer major benefits to these mechanisms. They also state that "agencies that create a means to monitor,

evaluate, and report the results of collaborative efforts can better identify areas for improvement" (2012, 11–12).

We can identify a number of distinct possible benefits from the inclusion of shared measurement efforts in collaborations.

4.1 Fostering Cooperation

a. **Creating a framework to focus the discussion and build momentum**. The initial dialogue among potential partners can lack focus or concreteness. Framing a discussion around desired outcomes and measures can be a useful launching pad for understanding common interests and areas of potential cooperation. This approach provides an important first step that helps to foster momentum in the cooperative process. In other cases however, the more concrete level of discussion at the outset may be detrimental and more trust building needs to take place beforehand (Kuo 2012).

b. **Strengthening the willingness to engage in collaborative problem solving.** Shared measurement allows each organization to better understand its place in the broader effort to deal with a complex issue: both its own contribution and that of the other organizations. This understanding of the "bigger picture" may provide tools and motivation for collaborative problem solving (Kramer, Parkhurst, and Vaidyanathan 2009; Bayfield et al. 2004; Ní Ógáin, Svistak, and de Las Casas 2013; Hanleybrown, Kania and Kramer 2012; Government Accountability Office 2005; Trumpour et al. 2011).

c. **Developing a common terminology.** The decision to engage in shared measurement compels the partner organizations to engage in the clear definition of a common terminology. This promotes effective dialogue and shared understanding (Kramer, Parkhurst, and Vaidyanathan 2009; Bayfield et al. 2004; Ní Ógáin, Svistak, and de Las Casas 2013).

4.2 More Concrete Goals and Data Driven Cooperation

a. **More concrete definition of common goals.** Shared measurement requires the more concrete definition of common goals that are agreed upon and similarly understood by all the partner organizations. This also sets the basis for more concrete discussions regarding other aspects of the cooperation such as the activities that needs to be carried out in order to reach these concrete goals. Creating a logic model for planning and describing the goals

of the cooperation and how they are to be achieved is a useful tool in generating this shared understanding (Bayfield et al. 2004; Auspos and Kubisch 2012; Ní Ógáin, Svistak, and de Las Casas 2013; GAO 2005; Williams 2010; Moynihan and Pandey 2010; Vangen and Huxham 2012; Herranz Jr. 2009; Innovation Network 2005).

b. **Ability to measure progress towards the achievement of common goals.** Shared measurement enables the partners to identify the overall progress of the collaboration as a whole towards the commonly defined goals, beyond the knowledge of their own individual progress. When there is synergy among programs, shared measurement is even more essential for understanding outcomes. The isolated measurement of each program does not reflect this synergy and does not allow for an understanding of the interaction among the programs and of the advantages of collaboration (Bayfield et al. 2004; Agostino 2012; Hanleybrown, Kania and Kramer 2012; De Bruijn 2007; Koppenjan 2008; Williams 2010; GAO 2012).

c. **Strengthening the accountability of partner organizations.** The ability to compare between organizations and the creation of a continuous learning community significantly contributes to strengthening the accountability of the partner organizations and to reinforcing their commitment to the common goals (Page 2004; Williams 2010; Provan and Milward 2001).

4.3 Strengthening Mutual Learning and Data Based Decision-making

a. **Expanding opportunities for mutual learning.** Common measures promote a more consistent reporting of outcomes between partner organizations, which:

   i. **Improves the ability to compare the outcomes of the different partner organizations.** This contributes to identifying the lessons that may be shared among the partners. It also can stimulate constructive competition and efforts to improve. The various types of comparisons that may be made were presented in Table 1, above.

   ii. **Improves the ability to aggregate data beyond the level of the individual program.** Aggregating data will make it possible to obtain an understanding of the cumulative impact of the collaboration on broader units of measurement (e.g., community, region, population). In some cases, aggregated data will make it possible to examine the impact in greater detail (e.g., by sub-group) and with

greater statistical confidence. Also, it may broaden the ability to examine the relationships between inputs, outputs, and outcomes (Kramer, Parkhurst, and Vaidyanathan 2009; Eckhart-Queenan and Forti 2011; Callahan and Kloby 2007).

iii. **Improves the ability to develop an effective ongoing learning community.** The increased capacity to compare and to aggregate data allows for the creation of effective multi-organizational communities of data-driven ongoing learning (Bayfield et al. 2004; Ní Ógáin, Svistak, and de Las Casas 2013; Atkinson and Maxwell 2007; Seldon, Jolin, and Schmitz 2012).

b. **Developing a better alignment of the goals, strategies and activities of the individual organizations.** Shared understanding of the progress being made is an essential input to the process of promoting agreement on how to align organizational goals, strategies, and activities towards common goals on an ongoing basis more effectively (Agostino 2012; Hanleybrown, Kania and Kramer 2012; Koppenjan 2008; Moynihan and Pandey 2010; GAO 2012; Seldon, Jolin, and Schmitz 2012; Innovation Network 2005).

4.4 Strengthening Measurement Capacity

a. **Strengthening the capacity to develop more effective and robust measurement systems.** There are significant economies of scale in developing and implementing measurement systems. Therefore, shared measurement efforts allow either a reduction in the cost per organization or the development of more robust and extensive systems. These savings may be partially offset by additional costs associated with the process of reaching a shared ongoing consensus (Kramer, Parkhurst, and Vaidyanathan 2009; Ní Ógáin, Svistak, and de Las Casas 2013; Farley and Polin 2012).

Moreover, the measurement process will also benefit from the input from a broader range of partners, each bringing its own experience, perspective and prior knowledge to the table (Callahan and Kloby 2007).

b. **Strengthening the internal measurement capacity within each partner organization.** Cooperation in measurement can assist each partner in strengthening its own measurement capacity, as each organization advises and assists the other organizations in their areas of strength (Kramer, Parkhurst, and Vaidyanathan 2009).

4.5 Summary of Benefits

In Figure 1 we summarize the benefits of shared measurement.

Figure 1: The Benefits of Shared Measurement

Fostering cooperation	• Creating a framework to focus the discussion and build momentum • Strengthening the willingness to engage in collaborative problem solving • Developing a common terminology
More concrete goals and data-driven cooperation	• More concrete definition of common goals • Ability to measure progress towards the achievement of common goals • Strengthening the accountability of partner organizations
Strengthening mutual learning and data-based decision-making	• Expanding opportunities for mutual learning • Developing a better alignment of the goals, strategies and activities of the individual organizations
Strengthening measurement capacity	• Strengthening the capacity to develop more effective and robust measurement systems • Strengthening the internal measurement capacity within each partner organization

5. The Challenges of Shared Measurement

Following our above review of the major benefits of shared measurement, it is necessary to mention the considerable challenges inherent in it as well.

5.1 Building and Sustaining Cooperation

a. **Generating the willingness to engage in shared measurement**. It cannot be taken for granted that organizations will be willing to enter a shared process that involves investment of resources, sharing information and reaching agreement and consensus. The considerable time that is sometimes required for full implementation of shared measurement can also be a deterrent. In some cases, program implementers and funders will prefer to invest time and money in the direct service of clients and will be reluctant to invest resources in shared measurement (Walker, Farley, and Polin 2012; Auspos and Kubisch 2012; Moynihan et al. 2011; Cabaj 2012).

b. **Reaching agreement among partners.** A major challenge in any collaboration is reaching agreement on the key issues. Introducing shared measurement creates an

additional set of required agreements. Disputes about measurement may even be a destabilizing factor in the effort to create the broader collaboration. There are a number of factors that may impinge on the ability to reach agreement:

i. **Differences in priorities and expectations** (Auspos and Kubisch 2012; Vangen and Huxham 2012; Huxham 2003).

ii. **Differences in organizational and measurement cultures** (Walker, Farley, and Polin 2012; Williams 2010; GAO 2012; Huxham 2003).

iii. **Variation in the measurement capacity** (Walker, Farley, and Polin 2012; Hanleybrown, Kania and Kramer 2012; Williams 2010).

c. **Deciding on the division of roles and responsibilities**. It is necessary to reach an agreement about the division of responsibilities among partners at each and every stage of the measurement (developing common measures, data collection, data analysis, etc.). The discussion regarding this division of work may generate tension since it involves issues such as status, power, organizational autonomy, organizational resources and so forth (Kramer, Parkhurst, and Vaidyanathan 2009; Walker, Farley, and Polin 2012; Bayfield et al. 2004; Chambers, Harper, and Garforth 2010).

d. **Maintaining cooperation over time**. It is not always easy to maintain long-term cooperation among organizations. Maintaining the commitment to shared measurement poses an additional challenge. Moreover, shared measurement not only creates additional arenas for shared learning but also for disagreements, in particular with respect to the analysis and interpretation of the findings. In addition, it can raise potentially divisive issues, such as comparisons of the partners' performance (Auspos and Kubisch 2012; Kuo 2012; Farley and Polin 2012).

5.2 Sharing and Comparing

a. **Information sharing, organizational exposure and privacy issues**. Partner organizations may be reluctant to share their outcomes with each other. This reluctance is particularly the case for organizations with very similar goals that operate in a context of competition. Additionally, sometimes problems will arise regarding the more general sharing of information with external agencies and the personal privacy of the participants (Walker, Farley, and Polin 2012; Behn 2010; Williams 2010; Vangen and Huxham 2012; Estevez, Fillottrani, and Janowski 2010).

b. **Risk of invalid comparisons.** Shared measurement encourages comparison between programs and organizations. However, this poses a challenge, as one needs to avoid making unfounded comparisons that ignore, omit or disregard significant factors that influence the degree to which the different organizations achieve outcomes. For example, comparisons need to take into account differences in the caseload or in the context in which each organization functions (Kramer, Parkhurst, and Vaidyanathan 2009; Ní Ógáin, Svistak, and de Las Casas 2013).

5.3 Unique Methodological Demands

a. **Standardization versus customization**. Inherent in shared measurement is the tension between the aspiration of each organization to customize the measurement to its own needs and the desire for standardization in order to enjoy the benefits of shared measurement (Sanfilippo and Chambers 2007; Lampkin et al. 2006; Ní Ógáin, Svistak, and de Las Casas 2013).

b. **Consistency of the measurement.** In most cases shared measurement requires that the organizations adhere to agreed upon measurement tools, methodologies and protocols. This demands ongoing monitoring and supervision or the centralization of the measurement process (Kramer, Parkhurst, and Vaidyanathan 2009; Walker, Farley, and Polin 2012; Auspos and Kubisch 2012; Ní Ógáin, Svistak, and de Las Casas 2013).

c. **Complexity of the measurement**. As noted, shared measurement enables one to carry out more complex measurement and analysis (e.g., broader units of analysis such as community, population or system levels), which may sometimes be more complex to measure. This tendency applies particularly to programs in the third category, which share a common overarching goal. The greater complexity often also entails additional costs. Thus, it is necessary to ensure that the increased benefits outweigh the costs (Bayfield et al. 2004; Auspos and Kubisch 2012; Kenis and Provan 2009; Provan and Milward 2001; Provan and Kenis 2008).

5.4 Summary of Challenges

In Figure 2 we summarize the main challenges of shared measurement.

Figure 2: The Challenges of Shared Measurement

Building and sustaining cooperation	• Generating the willingness to engage in shared measurement • Reaching agreement among partners • Deciding on the division of roles and responsibilities • Maintaining cooperation over time
Sharing and comparing	• Information sharing, organizational exposure and privacy issues • Risk of invalid comparisons
Unique methodological demands	• Standardization versus customization • Consistency of the measurement • Complexity of the measurement

6. Initial Lessons that have Emerged

The analysis and assessment of shared measurement is only now gaining significant attention in the literature. Some initial lessons that are beginning to emerge from recent experience are described below.

6.1 Adequate Infrastructures

a. **Providing adequate multi-year funding.** Even though shared measurement is more cost-effective, it requires significant resources to develop and maintain. Its development and initial implementation stage can take considerable time. To be successful it requires the setting aside of adequate multi-year funding. This may be more feasible if there is an external funder that contributes significantly to the funding of the shared measurement process (Walker, Farley, and Polin 2012; Hanleybrown 2011; Auspos and Kubisch 2012).

b. **Making effective use of advanced technologies.** Web-based and other forms of advanced technology can enable multiple users from multiple organizations to collect, analyze, share and report on findings in a more efficient and convenient way than ever before. Customized software and web-based solutions that support collaborative work are increasingly becoming an integral part of the work of effective collaborations (Kramer, Parkhurst, and

Vaidyanathan 2009; Hanleybrown 2011; Auspos and Kubisch 2012; Ní Ógáin, Svistak, and de Las Casas 2013).

c. **Providing strong professional consultation and facilitation**. Every collaboration utilizes facilitation mechanisms to encourage discussions and promote coordination. Shared measurement is no exception, and requires effective facilitation mechanisms around all stages of measurement. In addition, shared measurement also requires professional knowledge and expertise that needs to be addressed at the collaborative level. Strong professional support, consultation, and training are essential to the success of shared measurement efforts. In some cases, it is beneficial to have a dedicated professional "backbone" organization, which is not a partner in the collaboration, provide training, consultation and facilitation services. This kind of external dedicated staff with needed expertise can help collaborations sustain this time consuming effort over time (Walker, Farley, and Polin 2012; Hanleybrown 2011; Ní Ógáin, Svistak, and de Las Casas 2013; Hanleybrown, Kania and Kramer 2012; Seldon, Jolin, and Schmitz 2012).

6.2 Effective Relationships

a. **Fostering strong leadership**. A key to ensuring the development and ongoing implementation of shared measurement is the leadership of a strong champion—someone with authority who can take responsibility for bringing the stakeholders together, keeping them focused and interested, and for making sure that the whole system is on track and moving forward. There is also a need for senior management commitment and leadership within each partner organization (Kramer, Parkhurst, and Vaidyanathan 2009; Bayfield et al. 2004; Auspos and Kubisch 2012; Ní Ógáin, Svistak, and de Las Casas 2013).

b. **Encouraging broad engagement of partner organizations during design**. In order to promote buy-in and ensure that shared measurement accounts for the needs of all partners, it is of the utmost importance that there is broad and meaningful engagement of all partners in the planning and design stage (Kramer, Parkhurst, and Vaidyanathan 2009; Taylor et al. 2011; Ní Ógáin, Svistak, and de Las Casas 2013).

c. **Establishing clear roles and responsibilities.** Partner organizations need to have a clear division of roles and responsibilities relating to the various stages of the measurement process so that the coordinated effort of shared measurement can take place. It can be

helpful to document these key arrangements in writing. Documentation can be as informal as a mutual exchange of letters or as formal as a Memorandum of Understanding (MOU). The agreements should be regularly updated and monitored and partners should be held accountable for carrying them out (Walker, Farley, and Polin 2012; Bayfield et al. 2004; Auspos and Kubisch 2012; Williams 2010; GAO 2012; Farley and Polin 2012).

d. **Developing trust and agreement as to how data will be used.** In order for each partner organization to allow the others to access its information, it is critical to develop trust and understanding of how data will be used by others (Jones 2012; Williams 2010).

A helpful tool to formalize understandings between partner organizations in order to alleviate concerns and avoid future disputes is a formal data sharing agreement regarding data collection and the intended and permitted use of data. This agreement can be a component of a broader MOU, outlining the division of roles and responsibilities between partner organizations and other agreements reached (Walker, Farley, and Polin 2012; Bayfield et al. 2004; Auspos and Kubisch 2012; GAO 2012).

In some cases, partners will have concerns regarding the potential use of information to evaluate and compare them and others in an unfavorable manner. If this concern is justified, the collaboration can address these confidentiality issues by agreeing to report only on aggregated or anonymous peer data and to protect the confidentiality of individual organizations (Kramer, Parkhurst, and Vaidyanathan 2009).

6.3 Effective Processes for Learning and Improvement

a. **Creating learning and continuous improvement opportunities.** Multiple networks of people reviewing the measurement data at different levels, both within organizations and across organizations are essential for meaningful learning and continuous improvement**.** Insights into program operations, coordination and other aspects can prove invaluable to interpreting the results and suggesting adjustments. At the collaborative level, this can be done online or by other forms of impersonal communication (Kramer, Parkhurst, and Vaidyanathan 2009; Behn 2010; Auspos and Kubisch 2012; Ní Ógáin, Svistak, and de Las Casas 2013; Atkinson and Maxwell 2007; Seldon, Jolin, and Schmitz 2012).

However, creating a facilitated process for partners to gather periodically to share and discuss results, such as conference calls and in-person meetings, can also be very helpful. It enables partner organizations to better learn from each other and to refine the individual

and collective work in ways that promote meaningful continuous improvement (Kramer, Parkhurst, and Vaidyanathan 2009; Hanleybrown 2011; Auspos and Kubisch 2012).

In some cases, it is beneficial to have experts belonging to an external "backbone organization" facilitate the process of learning and improvement (Kramer, Parkhurst, and Vaidyanathan 2009).

b. **Ensuring the use of information for the benefit of both each partner individually and the collaboration as a whole.** Shared measurement can best be sustained when there is a balance in the emphasis on using the data for the needs of the individual organizations and for the needs of the collaborative as a whole. It is essential to ensure that information is used to benefit each partner individually and that it is also used to benefit the collaboration as a whole (Bayfield et al. 2004).

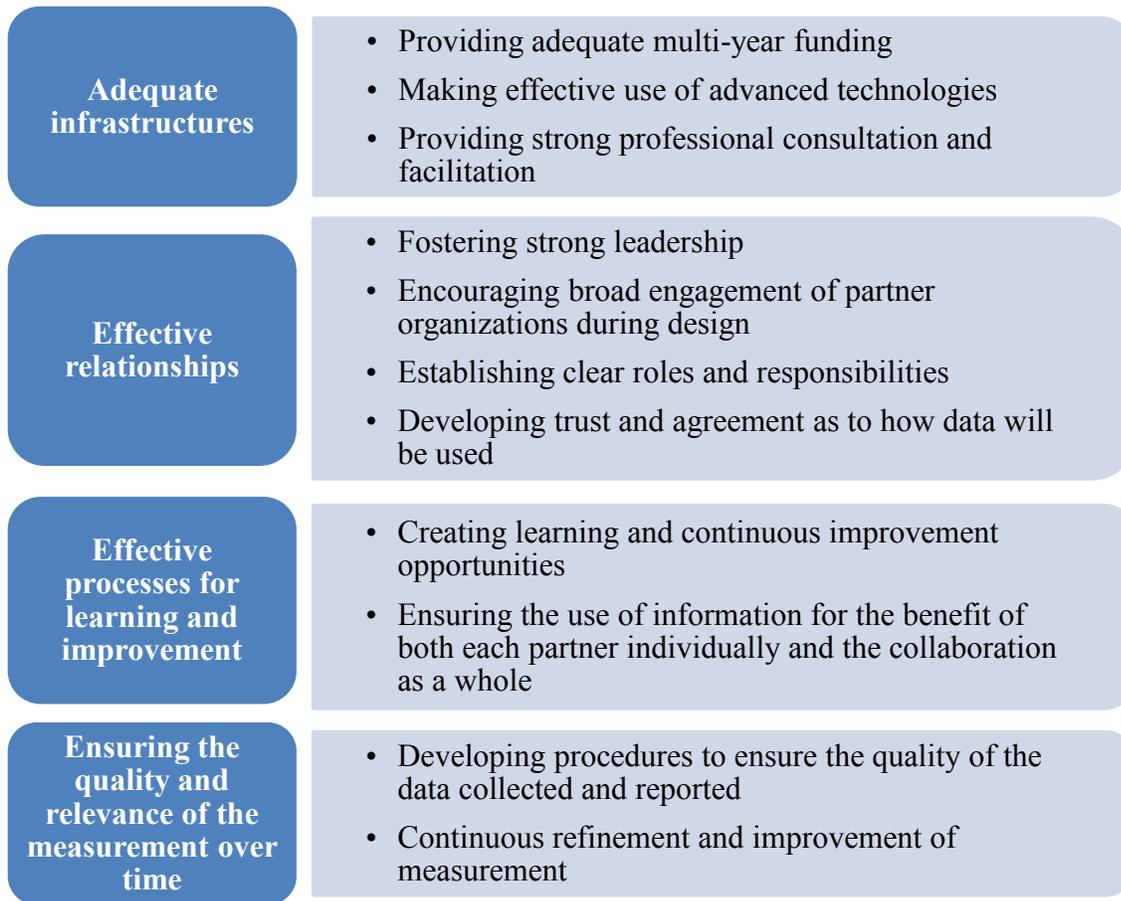## 6.4 Ensuring the Quality and Relevance of the Measurement Over Time

a. **Developing procedures to ensure the quality of the data collected and reported.** Incomplete, inconsistent and inaccurate collection and reporting of data is a concern in any measurement process. Data quality is even more challenging when working in a multi-organization collaborative framework. For this reason, partner organizations need to agree on the procedures that will ensure the quality of the data they are reporting. In some cases, the use of an external "backbone organization" can help ease tensions and ensure a more reliable process (Kramer, Parkhurst, and Vaidyanathan 2009; Hanleybrown 2011; Auspos and Kubisch 2012).

b. **Continuous refinement and improvement of measurement.** It is important to examine the measurement concept and systems through user feedback periodically, and to continually refine, adjust and improve them accordingly. Changes in the concept and systems can be due to mistakes in planning, problems in implementation or changing circumstances in the field (Kramer, Parkhurst, and Vaidyanathan 2009; Ní Ógáin, Svistak, and de Las Casas 2013).

6.5 Summary of Initial Lessons

In Figure 3 we summarize the initial lessons from the experience with shared measurement.

Figure 3: Initial Lessons Regarding the Implementation of Shared Measurement

Adequate infrastructures	• Providing adequate multi-year funding • Making effective use of advanced technologies • Providing strong professional consultation and facilitation
Effective relationships	• Fostering strong leadership • Encouraging broad engagement of partner organizations during design • Establishing clear roles and responsibilities • Developing trust and agreement as to how data will be used
Effective processes for learning and improvement	• Creating learning and continuous improvement opportunities • Ensuring the use of information for the benefit of both each partner individually and the collaboration as a whole
Ensuring the quality and relevance of the measurement over time	• Developing procedures to ensure the quality of the data collected and reported • Continuous refinement and improvement of measurement

7. Final Thoughts

This conference has focused on "Collaboration among Government, Market, and Society". As we have illustrated, there is a growing body of literature that emphasizes the important contribution of shared measurement to such collaborations.

This paper has demonstrated how the forms of shared measurement may vary significantly as in part influenced by the nature of the collaboration. It provides a basis for thinking more strategically about the choice and design of such systems as well as insights that can help to implement them more effectively.

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