

## Collective Impact Self-Assessment

This self-assessment helps identify strengths and areas of improvement in your collective impact initiative. This tool is designed for initiatives that are in the early stages of development, and for initiatives that are seeking a reboot or a refresh. Please read each benchmark and rate the level your collaboration has achieved, from a "1 = just begun", to a "4 = completely achieved". To make it simpler, we've described what a "4" looks like. For more information, please contact Deb Halliday, Halliday & Associates at [deb@debhalliday.com](mailto:deb@debhalliday.com).

Levels: 1 – Just begun   2 – Somewhat achieved   3 – Mostly achieved   4 – Completely achieved

Collective Impact Benchmarks	Evidence of Achievement	Level	Notes
<b>1: Backbone Support</b>			
<b>1A</b>	<b>There is a "lead agency" that is responsible and has the capacity to convene stakeholders and ensure the collaboration is productive.</b>		
	4 = There is a designated lead agency in the community that understands the collective impact process, coordinates the initial gatherings, and performs backbone functions.		
<b>1B</b>	<b>The collaborative has a steering committee or leadership team with authority for governance and decision-making.</b>		
	4 = A steering committee (7-12 people) is active. This group supports core initiative activities such as guiding vision and strategy, advancing policy, mobilizing resources, building community engagement and ownership, supporting alignment and shared measurement practices.		
<b>1C</b>	<b>Members of the collaborative have appropriate skills and credibility to support backbone functions.</b>		
	4 = Collaborative members have access to training on collective impact and collaboration; and opportunities to learn about policy and programmatic issues related to the work. Collaboration members feel comfortable articulating the initiative to the broader community.		
<b>2: Common Agenda</b>			
<b>2A</b>	<b>There is an identifiable overarching goal and vision with clearly defined boundaries and focus.</b>		
	4 = The vision, mission, and guiding principles for the initiative are adopted by the collaboration.		
<b>2B</b>	<b>Collaboration members have agreed upon the goals and approaches to achieving the overarching vision.</b>		
	4 = Partners use data (qualitative and quantitative) and stakeholder input to inform selection of strategies and actions.		
<b>2C</b>	<b>A diversity of perspectives, including those with lived experience, have provided input and feedback to our common agenda.</b>		
	4 = A broad range of community stakeholders, including people with lived experience, helped to inform and have endorsed the common agenda.		

3: Mutually Reinforcing Activities		
3A	The collaborative has a shared work plan that specifies the strategies and actions that different partners are committed to implementing.	4 = A work plan has been developed and adopted by the collaborative.
3B	Collaborative partners are aligning their own practices with collaborative goals and agreed upon action plans.	4 = Individual partners (agency, organization, etc) actively align their organizational activities (projects, grant opportunities, events and celebrations) to support the efforts of the whole.
3C	Working groups are established to coordinate activities in alignment with the work plan and partners hold each other accountable for implementing activities as planned.	4 = The collaboration functions through active working groups that are focused on work plan components that have been developed and adopted by the collaborative. Backbone support ensures working groups leverage opportunities and minimize duplication of efforts.
3D	The collaborative engages in specific, achievable and high-impact objectives.	4 = In addition to engaging in short-term wins, the collaborative has identified opportunities to change policies and practices that result in structural changes necessary for broad impact.
4: Continuous Communication		
4A	The initiative has structures and processes in place to inform, engage, and seek feedback from <i>internal</i> partners and stakeholders through regular meetings, newsletters, online platforms, etc.	4 = The collaboration has developed and is implementing an internal communications plan.
4B	The initiative has structures and processes in place to engage <i>external</i> stakeholders, such as regular meetings, websites, public convenings, public reports, and social and traditional media campaigns.	4 = The collaboration has developed and is implementing an external communications plan that is wide-reaching and adapted to reach a broad audience. Communication about the initiative's actions and priorities are public and transparent.

**5: Shared Measurement System**

<b>5A</b> The initiative has identified specific, measurable indicators of impact for the overarching goal as well as for each objective, where appropriate.	4 = A "data dashboard" exists that rolls the measurable indicators for the overarching goal and each objective. Where there is not a measurable indicator, efforts have been made to identify benchmarks for progress in the collaborative's efforts.
<b>5B</b> The initiative has a well-designed data infrastructure for storing and reporting data.	4 = The backbone (or other designated organization) houses the data dashboard and ensures it is regularly updated and reported.
<b>5C</b> Quality data on a set of meaningful indicators is reported in a timely manner.	4 = The collaborative has agreed to a data reporting plan (such as quarterly and annual releases) and adheres to that schedule.

**Collective Impact Self-Assessment: Summary**

After charting your answers with the rest of your team, summarize your findings.

In what areas does your collective impact initiative excel (i.e., in which benchmarks does your team have rankings of "4")?

In what areas does your collective impact initiative need to improve? (i.e., in which benchmarks does your team have rankings of "1" or "2")?

Please note any other observations.