

# KEEPING OUR PROMISE

## A GUIDE FOR EVALUATION IN SACRAMENTO'S PROMISE ZONE



The following tools and resources are designed to support Promise Zone evaluation activities. This toolkit can be expanded upon to implement more complex levels of evaluation by securing additional resources and engaging local data partners. The complete evaluation guide provides greater detail to support the use of these tools.

### WHAT'S IN THE TOOLKIT?

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#### EVALUATION FRAMEWORK

Offers a "menu of options" for evaluating the Sacramento Promise Zone. Each framework suggests evaluation questions, data collection processes, and reporting methods.



#### LOGIC MODELS

Provides a logic model for the Sacramento Promise Zone that outlines how the initiative intends to create change. A sample logic model and corresponding template are included for the Action Teams to use when outlining their goal-specific strategies.



#### RECOMMENDED INDICATORS

Identifies indicators that can be tracked over time to measure progress within each goal area of the Sacramento Promise Zone.



#### STRUCTURE FOR DATA COLLECTION AND ANALYSIS

Proposes a "Learning and Evaluation Council" to serve as the working body for data collection and analysis.



#### ONLINE RESOURCES

Offers a list of resources to provide support for planning and implementing evaluation activities.

# EVALUATION FRAMEWORK

The following table offers a “menu of options” for evaluating the Sacramento Promise Zone. Three levels of evaluation are outlined, each one increasing in complexity and requiring additional collaboration, time, and resources. This framework describes the purpose of each evaluation component, provides core evaluation questions, identifies the information needed to answer these questions, suggests potential data collection methods, and offers relevant reporting mechanisms. Each approach is informed by the Collective Impact framework and organized around the assessment of the Promise Zone’s key components: cross-sector collaboration, investment, and quality of life. This three-tiered structure offers an opportunity for Promise Zone stakeholders to deepen their understanding of evaluation by providing options and tools that exceed the minimum requirements and enhance learning of what works to create positive community change. The three levels of evaluation include:

- 1. Basic output evaluation:** The simplest evaluation structure that will meet HUD reporting requirements for the Promise Zone designation.
- 2. Enhanced outcome evaluation:** A holistic evaluation structure that supports continuous learning and enables data to have a greater impact on decision-making.
- 3. Advanced impact evaluation:** An in-depth, complex, and long-term evaluation structure that encourages innovative approaches and fosters a culture of learning.

**NOTE:** Each level of evaluation builds upon and includes elements of the prior approach. At any stage of evaluation, there is an opportunity to incorporate methods and tools from the other evaluation frameworks. The value of these methods will be enhanced if they are used repeatedly throughout the life of the Promise Zone initiative.

- Potential data sources for evaluation:
- City, county, state, & federal datasets
    - UCD CRC mapping tools (ROI, PYOM)
    - Program data
  - Promise Zone residents
    - Promise Zone staff: HUD, SHRA, VISTAs
    - Action Teams, councils, & committees
  - Implementation & supporting partners
    - Social media

EVALUATION PURPOSE	CORE QUESTIONS	INFORMATION REQUIRED	DATA COLLECTION	REPORTING METHOD	
<i>Why are we evaluating?</i>	<i>What do we want to learn?</i>	<i>What information do we need?</i>	<i>How will we get this information?</i>	<i>How will we share results?</i>	
<p><b>Basic Output Evaluation</b></p> <p><i>What is happening? How much and by whom?</i></p> <p>Describe and track what occurs in relation to collective impact, investments, physical changes, and progress toward outcomes in the five Promise Zone goals.</p> <p>Identify emerging opportunities, challenges, and questions.</p> <p>Meet minimum HUD reporting requirements.</p>	<b>Collaboration</b>	<ul style="list-style-type: none"> <li>• To what extent did participants work together to achieve Promise Zone goals?</li> </ul>	<ul style="list-style-type: none"> <li>• Group membership and participation (who &amp; how often)</li> <li>• Changes in Promise Zone structure and leadership</li> </ul>	<ul style="list-style-type: none"> <li>• Annual partner survey</li> <li>• Tracking participation in convenings and trainings</li> <li>• MOUs with partners</li> </ul>	<ul style="list-style-type: none"> <li>• Monthly operations update*</li> <li>• Quarterly success stories*</li> <li>• Quarterly HUD update*</li> <li>• Annual strategic plan*</li> <li>• Website, listserv, social media</li> <li>• Annual partner summit</li> </ul>
	<b>Investment</b>	<ul style="list-style-type: none"> <li>• What new investments were generated as a result of the Promise Zone designation?</li> </ul>	<ul style="list-style-type: none"> <li>• Federal grants received</li> <li>• Non-federal funding received</li> <li>• VISTA hours &amp; activities</li> <li>• Federal technical assistance provided (TA type and amount)</li> <li>• New Promise Zone programs</li> </ul>	<ul style="list-style-type: none"> <li>• Certification letters</li> <li>• Funding log</li> <li>• TA tracking log</li> <li>• Program data</li> </ul>	<ul style="list-style-type: none"> <li>• Monthly federal grant update*</li> </ul>
	<b>Quality of Life</b>	<ul style="list-style-type: none"> <li>• What progress was made in achieving the five goals?</li> </ul>	<ul style="list-style-type: none"> <li>• Changes in selected indicators and strategic priorities</li> <li>• Participants and activities</li> <li>• New neighborhood amenities related to five goals</li> </ul>	<ul style="list-style-type: none"> <li>• Action team work plan</li> <li>• List of strategic priorities</li> <li>• Data sets for goal indicators</li> <li>• Program data</li> <li>• PhotoVoice projects</li> <li>• Mobile data collection</li> </ul>	<ul style="list-style-type: none"> <li>• Quarterly HUD reports*</li> <li>• Annual HUD reports*</li> <li>• Annual CRC data snapshot</li> <li>• Presentations to elected bodies</li> <li>• Press release</li> <li>• Community progress report</li> </ul>

\* Indicates a required reporting mechanism as mandated by HUD.

EVALUATION PURPOSE	CORE QUESTIONS	INFORMATION REQUIRED	DATA COLLECTION	REPORTING METHOD
<i>Why are we evaluating?</i>	<i>What do we want to learn?</i>	<i>What information do we need?</i>	<i>How will we get this information?</i>	<i>How will we share results?</i>
<p><b>Enhanced Outcome Evaluation</b></p> <p><i>How is it working? What progress is being made?</i></p> <p>Identify promising strategies and/or barriers.</p> <p>Surface unanticipated outcomes, behavioral change, and systems change that emerge in a dynamic environment.</p> <p>Provide qualitative evidence of changes in residents' lives.</p> <p>Track distribution of improvements across geography and populations.</p>	<p><b>Collaboration</b></p> <p>How did capacity for collaboration change among Promise Zone partners?</p> <p>How did collaboration influence policy and systems change?</p>	<ul style="list-style-type: none"> <li>• New relationships among partners/stakeholders</li> <li>• Quality of participation over time</li> <li>• Effectiveness of backbone orgs in facilitating collaboration</li> <li>• Local context (history, culture, politics, economy, environment)</li> </ul>	<ul style="list-style-type: none"> <li>• Annual partner survey</li> <li>• Network analysis</li> <li>• Key informant interviews</li> <li>• Community engagement tracking log</li> <li>• Event/activity tracking log</li> </ul>	<ul style="list-style-type: none"> <li>• Case studies of Promise Zone implementation activities and neighborhood impacts</li> <li>• Synthesis report of successes, challenges, &amp; lessons learned</li> </ul>
	<p><b>Investment</b></p> <p>How were new resources obtained or leveraged to support the goals?</p> <p>How did a collaborative approach influence equitable resource allocation?</p>	<ul style="list-style-type: none"> <li>• Joint applications for funding</li> <li>• Overall funding awarded</li> <li>• Data used in decision-making</li> <li>• Changes in how local funding is influenced and allocated</li> </ul>	<ul style="list-style-type: none"> <li>• Certification letters</li> <li>• Key informant interviews</li> <li>• Opportunity mapping</li> <li>• Ripple effect mapping</li> <li>• Public document review (e.g., budgets, minutes)</li> </ul>	<ul style="list-style-type: none"> <li>• Data dashboards tracking community investment</li> <li>• Synthesis report of investment decisions and local policies</li> </ul>
	<p><b>Quality of Life</b></p> <p>How did Promise Zone activities contribute to progress in the five goals?</p> <p>How did the process influence outcomes?</p>	<ul style="list-style-type: none"> <li>• Key indicator data in comparison to baseline conditions</li> <li>• Understanding key drivers and influencers of change</li> <li>• Analysis of systems change (e.g., policies, economic change)</li> </ul>	<ul style="list-style-type: none"> <li>• Resident quality of life surveys (including youth)</li> <li>• Key informant interviews</li> <li>• Socio-economic and built environment mapping</li> <li>• Program data from partners</li> <li>• Advocacy inventory</li> </ul>	<ul style="list-style-type: none"> <li>• Data dashboards showing changes in key indicators</li> <li>• Policy briefs</li> <li>• Presentations to public agencies, community leaders, policymakers, and businesses</li> </ul>
<p><b>Advanced Impact Evaluation</b></p> <p><i>How did the Promise Zone transform the community? What factors contributed?</i></p> <p>Identify links between process and outcomes.</p> <p>Understand what conditions led to or prevented progress at the individual, community, &amp; systems level.</p> <p>Determine the value or significance of the Promise Zone designation over time.</p> <p>Compare equitable impacts and differences in communities and populations over time.</p>	<p><b>Collaboration</b></p> <p>What about the collaborative process was most effective, for whom and why?</p>	<ul style="list-style-type: none"> <li>• Gains in capacity and coordination among federal and local partners, and residents</li> </ul>	<ul style="list-style-type: none"> <li>• Key informant interviews</li> <li>• Focus groups</li> </ul>	<ul style="list-style-type: none"> <li>• In-depth report on Sacramento's collective impact approach</li> </ul>
	<p><b>Investment</b></p> <p>What sustainable changes in investment and resource allocation occurred?</p>	<ul style="list-style-type: none"> <li>• Quantity and quality of dedicated funding streams</li> </ul>	<ul style="list-style-type: none"> <li>• Mapping neighborhood investments (e.g., programs, services, amenities)</li> <li>• Focus groups</li> </ul>	<ul style="list-style-type: none"> <li>• Interactive web maps showing investment and resource flow patterns</li> </ul>
	<p><b>Quality of Life</b></p> <p>What long-term impact did the Promise Zone have?</p> <p>What interventions and activities were most effective in creating change? Why?</p> <p>How does quality of life compare to other places?</p>	<ul style="list-style-type: none"> <li>• Changes in quality of life for residents (long-term)</li> <li>• Influential changes in local, state, and national policy</li> <li>• Spatial and temporal changes in key indicator data</li> <li>• Data from similar communities, with and without Promise Zones</li> </ul>	<ul style="list-style-type: none"> <li>• Longitudinal study</li> <li>• Comparative study</li> <li>• Disaggregation of data by geography and populations</li> <li>• Policy analysis</li> <li>• Media content analysis</li> <li>• Focus groups</li> </ul>	<ul style="list-style-type: none"> <li>• Interactive web maps and community profiles showing changes in key indicator data</li> <li>• Post-project evaluation report</li> <li>• Comparative report with a non-Promise Zone area.</li> <li>• Media outreach</li> </ul>

# SACRAMENTO PROMISE ZONE LOGIC MODEL

**VISION:** High quality of life for residents in the Sacramento Promise Zone.

- GOALS:**
1. Create jobs.
  2. Promote health and access to healthcare.
  3. Increase economic activity.
  4. Improve educational opportunities.
  5. Promote sustainable communities.

**KEY INDICATORS:** Cross-sector collaboration, investment, and progress in the five goal areas.

INPUTS	PARTICIPANTS	ACTIVITIES	OUTPUTS	OUTCOMES	IMPACT
<i>What we invest...</i>	<i>Who we reach...</i>	<i>What we do...</i>	<i>Short-Term</i>	<i>Mid-Term</i>	<i>Long-Term</i>
Staff: SHRA, HUD, VISTAs Implementation Partners Supporting Partners Data Partners Action Teams Resident Council HUD's Data and Innovation Team Knowledge/expertise Funding (federal grants) Local initiatives (e.g., BHC, CNI, RAACD)	Residents Neighborhood Associations Community organizations Business owners Health professionals School districts Colleges/Universities Government agencies Policy makers	Communicate and collaborate with Promise Zone stakeholders, including residents. Connect partners with funding opportunities and certification letters. Conduct action team meetings, partner convenings, & trainings. Establish MOUs with Promise Zone supporting partners. Collect data regularly and evaluate progress in the Promise Zone. Receive HUD (and other) technical assistance.	Shared commitments to Promise Zone goals, implementation structure, & neighborhood priorities. Increased funding to support neighborhood revitalization. Engagement in action team meetings, partner convenings, & trainings. Implementation of Promise Zone goal strategies. Greater capacity for data collection, sharing, learning, and evaluation. Consensus on shared data measurements.	Sustained relationships among Promise Zone partners & residents. Positive physical change in neighborhoods. Students well-prepared for higher education or career training. More living-wage jobs. Skilled workforce. Increased economic activity. Increased household income. Increased health care access, healthy food consumption, and physical activity. Equitable policies. Data-driven decisions.	Empowered, civically engaged communities. Revitalized, safe neighborhoods. Diversified economy with high quality jobs. Increased resident prosperity. Improved health and wellness of residents. More equitable distribution of resources, opportunities, and representation across diverse populations in and beyond Sacramento's Promise Zone. Improved quality of life for Promise Zone residents.

# ACTION TEAM LOGIC MODEL (JOBS SAMPLE)

- GOAL:** Accelerate job creation by improving workforce development for youth and adult career pathways.
- SUB-GOALS:**
1. Invest in a sector approach to occupational skills training that prepares jobseekers in the Promise Zone for career pathways to middle skilled jobs that ensure self-sufficiency.
  2. Improve business climate for economic growth in the Promise Zone, establishing a starting point for addressing economic impediments that prevent business growth in the Promise Zone area.
  3. Diversify the economy through growth and support of core business clusters.
- INDICATORS:** Employment rate, job growth, job quality, business growth, and business regulation costs. **Other indicators: To be determined by Action Team.**

INPUTS	PARTICIPANTS	ACTIVITIES	OUTPUTS	OUTCOMES	IMPACT
<i>What we invest...</i>	<i>Who we reach...</i>	<i>What we do...</i>	<i>Short-Term</i>	<i>Mid-Term</i>	<i>Long-Term</i>
Staff: SHRA, HUD, VISTAs Implementation Partners: SETA, Greater Sacramento Urban League, others Supporting Partners Data Partners Jobs Action Team Resident Council Knowledge and Expertise Funding (federal grants) Local initiatives (e.g., BHC, CNI, RAACD) <b>Other resources: To be determined by the Action Team</b>	Residents Business owners Business associations Chambers of Commerce Local organizations Government officials <b>Other participants: To be determined by the Action Team</b>	<b>To be determined by the Action Team and updated annually.</b>	<b>To be determined by the Action Team based on proposed activities.</b>	Increase in the number of living-wage jobs created. Improved business climate. Skilled workforce.	Diversified economy with high quality jobs. Increased resident prosperity. More equitable distribution of resources, opportunities, and representation across diverse populations in and beyond Sacramento's Promise Zone. Improved quality of life for Promise Zone residents.

# ACTION TEAM LOGIC MODEL

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GOAL:

SUB-GOALS:

INDICATORS:

INPUTS	PARTICIPANTS	ACTIVITIES	OUTPUTS	OUTCOMES	IMPACT
<i>What we invest...</i>	<i>Who we reach...</i>	<i>What we do...</i>	<i>Short-Term</i>	<i>Mid-Term</i>	<i>Long-Term</i>

# MEASUREMENTS OF PROGRESS: RECOMMENDED INDICATORS

The indicators provided in this table are aligned with the goals and sub-goals stated in the 2017 Sacramento Promise Zone Plan. As Action Teams develop their logic models and implement projects over the course of the initiative, these sub-goals may change and the indicators should be adjusted to reflect this evolution.

PROMISE ZONE GOALS	PROMISE ZONE SUB-GOALS	INDICATORS
<p><b>Create Jobs</b></p> <p>Accelerate job creation by improving workforce development for youth and adult career pathways.</p>	<p>A. Invest in a sector approach to occupational skills training that prepares jobseekers in the Promise Zone for career pathways to middle skilled jobs that ensure self-sufficiency.</p> <p>B. Improve business climate for economic growth in the Promise Zone, establishing a starting point for addressing economic impediments that prevent business growth in the Promise Zone area.</p> <p>C. Diversify the economy through growth and support of the core business clusters.</p>	<ul style="list-style-type: none"> <li>• Employment rate (%)</li> <li>• Job growth (%)</li> <li>• Job quality (%)</li> <li>• Business growth (%)</li> <li>• Business regulation costs*</li> </ul>
<p><b>Promote Health and Access to Healthcare</b></p> <p>Promote healthy behaviors and increase availability of health interventions.</p>	<p>A. Increase adoption of comprehensive approaches to improve community design that supports physical activity.</p> <p>B. Increase access to healthy foods by supporting and expanding existing community programs.</p> <p>C. Implement strategies to translate and integrate known community health interventions into usual clinical care approaches.</p>	<ul style="list-style-type: none"> <li>• Health care availability (#)</li> <li>• Years of life lost (rate)</li> <li>• Infant health (%)</li> <li>• Infant mortality*</li> </ul>
<p><b>Increase Economic Activity</b></p> <p>Promote a sustainable economic base by investing in the Promise Zone. Facilitate and promote projects and program initiatives that support economic growth, quality of life, and job creation in key areas.</p>	<p>A. Revitalize commercial corridors within the Promise Zone, each of which is a vital asset and offers tremendous revitalization opportunities, including retail, commercial, and housing.</p> <p>B. Focus resources on key infill and major development projects within the Promise Zone.</p> <p>C. Implement and promote policy and planning initiatives that effectively improve business-friendly conditions and processes to improve small business development in the Promise Zone.</p>	<ul style="list-style-type: none"> <li>• Business growth (%)</li> <li>• Minimum basic income (%)</li> <li>• Commercial vacancy rates*</li> <li>• New project permits*</li> </ul>
<p><b>Improve Educational Opportunities</b></p> <p>Increase educational opportunities for all Promise Zone students along the education spectrum from Pre-K to higher education.</p>	<p>A. Increase third grade reading proficiency by focusing on early learning programs and results-based interventions.</p> <p>B. Improve retention rates by increasing basic skills competencies in reading, writing, and math to improve student preparedness for degree, certificate courses, and employment.</p> <p>C. Support and improve college and career readiness programs with a focus on increasing STEM/STEAM education opportunities.</p>	<ul style="list-style-type: none"> <li>• 3rd grade reading and math proficiency (%)</li> <li>• HS graduation rate (%)</li> <li>• UC/CSU Eligibility (%)</li> <li>• Chronic absenteeism</li> <li>• Elementary suspensions*</li> </ul>
<p><b>Promote Sustainable Communities</b></p> <p>Promote a sustainably built community. Facilitate neighborhood revitalization by creating destinations that are desirable for both living and working.</p>	<p>A. Strengthen community capacity to address gang involvement and create safe neighborhoods, especially for boys and men of color residing in the Promise Zone.</p> <p>B. Increase the role of arts in neighborhoods to promote community engagement and identity within the Promise Zone.</p> <p>C. Increase housing types and transit growth to promote livability and connectivity within the Promise Zone.</p>	<ul style="list-style-type: none"> <li>• Neighborhood stability (%)</li> <li>• Housing affordability (ratio)</li> <li>• Distance to transit and/or transit frequency*</li> <li>• Perceptions of safety*</li> </ul>

\* Denotes a data point that is not available through the ROI or PYOM, but is recommended as a valuable measure of progress.

# MEASUREMENTS OF PROGRESS: ACTION TEAM INDICATORS

An essential step in creating a shared measurement system is working together with Promise Zone stakeholders to select indicators that can be used to track progress consistently over time. This indicator template is a resource for Action Teams to identify current projects that align with their Promise Zone goal and to select indicators that can be used to measure progress. Dialogue amongst partners is essential to reach agreement on how success will be defined. For example, in successful Collective Impact efforts, partners commit to “moving the needle” on specific metrics by at least 10%. Alternatively, the Results-Based Accountability (RBA) framework does not encourage the selection of numerical targets, and instead prioritizes “turning the curve” (aka: changing the direction of a trend).

**Please select the Promise Zone goal that your Action Team is focusing on:**

- Create Jobs    Increase Economic Activity    Improve Educational Opportunities    Improve Health and Wellness    Facilitate Neighborhood Revitalization

SUB-GOALS	PRIORITY PROJECTS	KEY INDICATORS
<i>What are you trying to achieve?</i>	<i>How will you reach your goal?</i>	<i>How will you measure progress?</i>

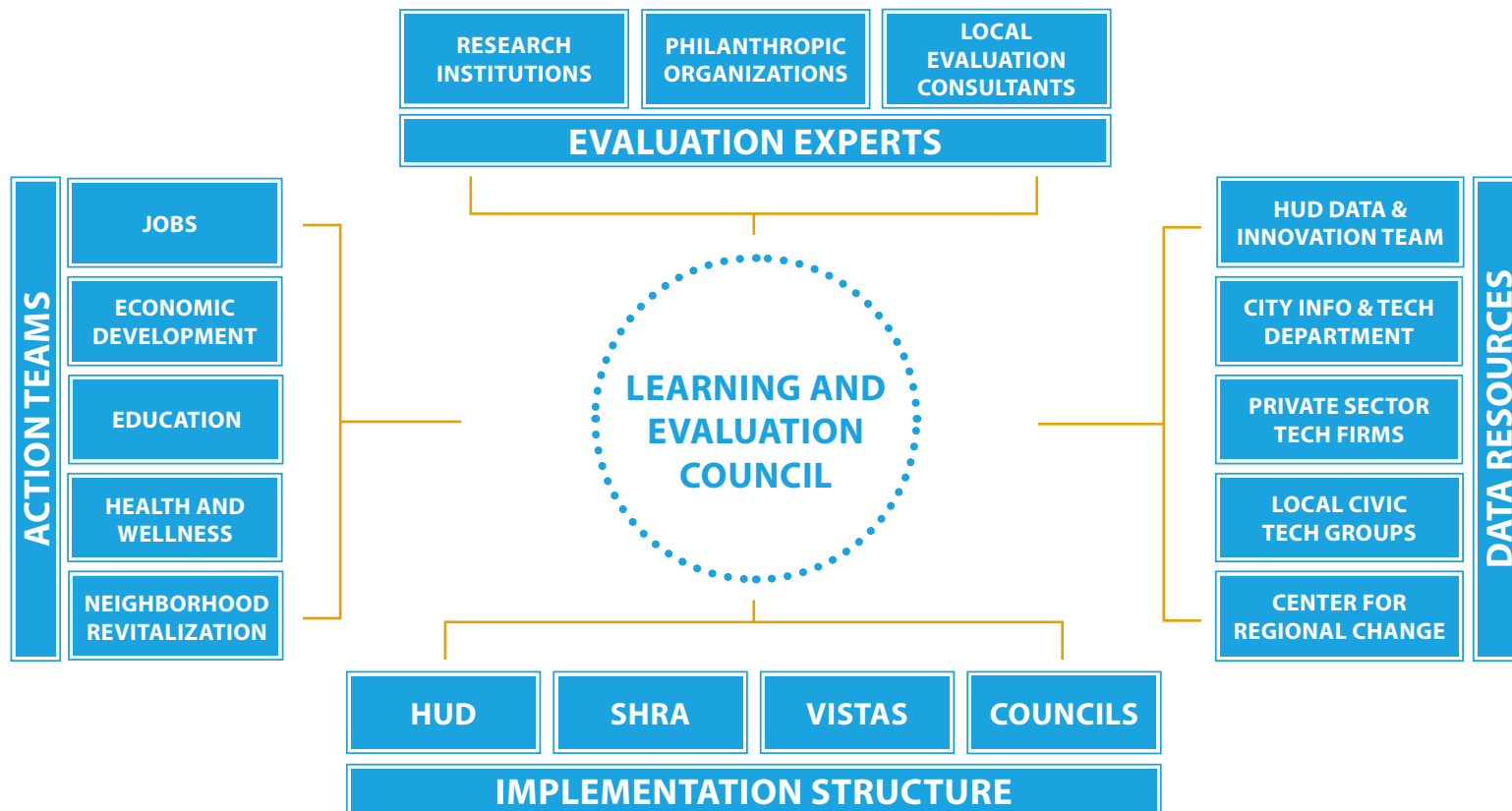


# STRUCTURE FOR DATA COLLECTION AND ANALYSIS

Promise Zone evaluation activities will require collaboration among multiple stakeholders working across sectors, jurisdictions, and research disciplines. The current organizational structure of the Promise Zone identifies the key entities that are implementing the initiative, but does not specify their role regarding evaluation. The creation of a “Learning and Evaluation Council” would capitalize on partners’ strengths and help coordinate resources in order to move the evaluation forward. The Council would include a variety of members, including representatives from the Action Teams, data partners, HUD, SHRA, VISTAs, other Promise Zone Councils, and organizations with expertise in working with and learning from data. To be effective, a lead entity (working in partnership with others) will need to convene the group and provide “backbone” support to coordinate activities such as agenda planning and communication.

## The primary role and purpose of the Learning and Evaluation Council would be to:

- Serve as thought partners and provide expertise to implement a robust evaluation of the Promise Zone initiative, including synthesizing and analyzing cross-sector data and engaging the community to provide a holistic picture of progress on the five goals.
- Support the overall data collection, analysis, management, and sharing processes by identifying resources (e.g., data sources, visualization tools, partner opportunities, funding, etc.), working to eliminate barriers, and developing new systems for evaluation to improve Promise Zone activities and strategies.
- Provide guidance to the Action Teams to select indicators, analyze and interpret data, develop recommendations, share lessons, and use data in decision making.
- Assist the lead agency in fulfilling HUD reporting requirements and communicating results throughout the community.
- Coordinate with national Promise Zone evaluation efforts and federal technical advisors.



# ONLINE TOOLS AND RESOURCES FOR EVALUATION

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## GETTING STARTED

**HUD Exchange: Promise Zones** Provides information and resources, including grants and technical assistance opportunities and the Community Development Marketplace (CDM), a database of community development project data to facilitate peer exchange and new partnerships, and assist funders and social investors in finding potential investment opportunities.

**Sacramento Promise Zone Website** Provides information and resources about the Sacramento Promise Zone initiative, including details about the organizational structure, focus areas, grant support, funding, community events, and spotlight stories.

**UC Davis Center for Regional Change (CRC)** is a catalyst for innovative, collaborative, and action-oriented research. The CRC brings together faculty and students from different disciplines, and builds bridges between university, policy, advocacy, business, philanthropy, and other sectors. The CRC's goal is to support the building of healthy, equitable, prosperous, and sustainable regions.

**Converge Consulting, Research & Training (Converge CRT)** is dedicated to creating social change and improved health through the facilitation of multi-stakeholder collaborative planning projects.

**Collective Impact Forum** An online network of cross-sector collaboration practitioners that includes the latest resources, tools, advice, research, and case studies. Designed to accelerate the effectiveness and adoption of Collective Impact through sharing experiences and learning.

**Guide to Evaluating Collective Impact** A 3-part series of downloadable handbooks that walks partners through the process of assessing progress and impact, provides case studies and examples, and sample questions, outcomes, and indicators.

**Collaborating for Equity and Justice: Moving Beyond Collective Impact** Discusses the limitations of Collective Impact and identifies key principles that are needed to achieve complex community change through equity and justice.

**The Intersector Project** Offers an extensive online library and toolkit to help plan, implement, and evaluate cross-sector collaborations.

**Evaluating Community Programs and Initiatives** Information from the [Community Tool Box](#) on developing a plan for evaluation, evaluation methods, and using evaluation to understand and improve community change initiatives.

**Center for Evaluation Innovation** Focuses on evaluation in the philanthropic sector, especially the challenging areas to assess, such as systems and policy change, and advocacy. Also directs [The Evaluation Roundtable](#), a network of foundation leaders in evaluation.

**Living Cities** A collaborative of philanthropic and corporate partners who work with cross-sector leaders in cities to develop and scale new approaches geared at achieving dramatically better results for low-income people, with a multidisciplinary focus on both neighborhood and system transformation. Website offers a variety of tools, research reports, and guidance for cross-sector collaborations, and free resources to support Collective Impact efforts.

**What Counts: Harnessing Data for America's Communities** This online book explores opportunities and challenges for the strategic use of data to reduce poverty, improve health, expand access to quality education, and build stronger communities. It illustrates how data can be used to guide community initiatives, investment strategies, and policy choices.

**A Practical Guide to Evaluating Systems Change in a Human Services System Context** A thorough explanation and step-by-step guide to design and implement an evaluation of systems change. Includes guidance for developing research questions, data collection tools, and reports.

**Evaluating Collaboratives** A classic resource from the University of Wisconsin Cooperative Extension that includes tools and resources for evaluating the process and outcomes of collaboration.

**The Data Governance Institute** provides in-depth, vendor-neutral best practices and guidance for developing decision-making procedures and information management processes, including the DGI Data Governance Framework.

## FORMING A COMMON VISION AND GOALS

**Community Toolbox: Developing a Logic Model or Theory of Change** Learn how to create and use a logic model, a visual representation of activities, outputs, and expected outcomes.

**Developing a “So That” Chain** Action Teams can undertake the exercise on page 14 to build their conceptual model. A “so that” chain can be a useful exercise to more explicitly show the short-, intermediate-, and long-term changes that will lead to lasting change. It is a tool for describing a strategy and how it links systemic change.

**W.K. Kellogg Foundation Logic Model Guide** Provides an orientation to the principles of “logic modeling” to enhance program planning, implementation, and dissemination activities.

## ESTABLISHING SHARED MEASUREMENTS

**Agree on Measures of Success** A guide from the Intersector Project to help collaborative partners identify and agree upon indicators.

**Developing Shared Measurement** A short “how to” guide for using a Collective Impact approach to reaching agreement on shared measurements. Includes examples of reports.

**Results Based Accountability** An extensive “how to” guide for selecting and tracking population indicators and implementing performance based measurements. Distinguishes between results for populations in a geographic area and results for the customers or clients of a program, agency or service system. Includes [data resources](#), [exercises to select indicators](#), and [tools to design data systems](#).

**A Five Step Method for Identifying Performance Measures for any Program in about 45 Minutes** This structured process using Results Based Accountability to identify three levels of indicators: headline measures, secondary measures, and a data development agenda.

**Working Group Instructions for Developing Shared Metrics** A useful tool for facilitating a discussion and selection of indicators among collaborative partners.

**Data Inventory** Use this spreadsheet to determine what measures to track, categorize the accessibility of data, and plan next steps to get the data you need for your work.

**Cross-Sector Partnership Assessment Group Planning and Discussion Guide** This assessment helps participants understand how to work together effectively for Collective Impact. Multiple representatives complete the assessment and through a discussion of the findings, individuals can raise challenges and concerns with partners and determine potential solutions.

## CONDUCTING DATA COLLECTION AND ANALYSIS

**Regional Opportunity Index (ROI)** An index of community and regional opportunity developed by the UC Davis Center for Regional Change for understanding social and economic opportunity in California’s communities. The goal of the ROI is to help target resources and policies toward people and places with the greatest need, to foster thriving communities of opportunity for all Californians. It does this by incorporating both a “people” component and a “place” component, integrating economic, infrastructure, environmental, and social indicators into a comprehensive assessment of the factors driving opportunity.

**Putting Youth on the Map (PYOM)** A powerful mapping tool developed by the UC Davis Center for Regional Change for youth and adults working to ensure youth well-being in California. PYOM provides holistic place-based indices measuring youth well-being and severe isolation, as well as maps illustrating income adequacy, suspension/truancy, transportation access, young adult voting, and more.

**City of Sacramento Open Data Portal** Provides access to city information. Users can navigate through the data catalog, download datasets, share data through social networks, and embed data on websites. Data sets also can be used to create civic applications by third party developers.

**Healthy City** Provides data and mapping tools to help build a better community. Allows users to chart data, map demographic, health, and other point and thematic data; create asset maps and find gaps in services; and map two geographies or variables at a time.

**Local Data** Mobile cloud technology and platform used to map neighborhood conditions and help communities make data-driven decisions by capturing and visualizing street-level information in real time.

**Open Street Map** An initiative to create and provide free, worldwide geographic data.

**Follow the Money** Federal Reserve Bank online, interactive tool used to track and compare grant investments by metro area and issue areas.

**Social Network Analysis** A tool for understanding how relationships influence community change through collaboration and sharing information.

**Ripple Effect Mapping** Describes a low cost, participatory method to conduct impact evaluation using elements of Appreciative Inquiry, mind mapping, and qualitative data analysis to engage program participants and other community stakeholders to reflect upon and visually map the intended and unintended changes resulting from a program or complex collaboration.

**National Neighborhood Indicators Partnership** Coordinated by the Urban Institute, NNIP is a peer learning network that shares a mission to improve low-income neighborhoods by empowering local stakeholders to use data in planning, policymaking, and community building. Their site offers online guides to data sharing, insights on civic technology, and examples of successful projects.

**Guide to Starting a Local Data Intermediary** Describes the role of a local data intermediary and the process of establishing this type of resource to support the use of neighborhood level data in decision making. Includes information and resources on funding, staffing, and building the information system.

**Civic Tech and Data Collaborative (CTDC)** A national partnership that works to leverage data and technology to enable civic leaders to make better decisions and address issues that affect low-income residents. Tools and methods are open source.

**Data Governance Checklist** Helps stakeholder organizations, such as state and local educational agencies, with establishing and maintaining a successful data governance program to help ensure the individual privacy and confidentiality of education records.

**Data Governance and Stewardship** Offers an overview of key concepts and resources related to establishing systems for data privacy, confidentiality, and security.

**Be Healthy Sacramento** This site is designed as a hub, presenting public data on a variety of topics, from education to health.

**Citizen Participation and Consultation Toolkit** HUD's guide to engaging stakeholders in community change efforts. Includes best practices, samples, and a self-assessment and planning tool to assess past activities and create participation priorities and goals.

**Sacramento County Open Data Portal** Provides access to data on Sacramento County's utilities, transportation, public works, finances, permits, demographics, GIS, and other related information.

**The Case Study Tool book** Designed to help individuals create their own case studies more successfully and use them as effective tools for change.

**The Newark Mapping Project** An innovative project that aims to survey and map the physical environment of three neighborhoods and document conditions that impact resident quality of life with the help of paid community members.

**Youth Participatory Evaluation** An approach that engages young people in evaluating the programs, organizations, and systems designed to serve them. This site outlines YPE principles and provides resources to help facilitate YPE practices.

**Young Ethnographer's Survey** A project of the Los Angeles Promise Zone, this six-week summer job program teaches students important college and career skills, and engages young people in a neighborhood survey to measure the quality of life in their community.

**Youth Adult Partnerships in Evaluation** An extensive guide to launch a participatory evaluation approach that focuses on providing youth and adults with ongoing opportunities to engage in collective deliberation and reflection. Includes "user friendly" data analysis methods and other useful tip sheets and resources.

**Participatory Evaluation with Young People** A step-by-step guide to engaging youth in the evaluation/research process, includes practical tools and small group exercises.

**Talking the Walk** Extensive "how to" manual for cross-sector partners to support productive internal and external communication.

**Privacy Technical Assistance Center (PTAC)** One component of the U.S. Department of Education's comprehensive privacy initiatives which offers technical assistance to state education agencies, local education agencies, and institutions of higher education related to the privacy, security, and confidentiality of student records. The site offers data security policies and procedures, as well as a privacy toolkit containing best practice guides and related resources.

## CREATING A PROCESS FOR REFLECTION AND REPORTING

**HUD Communications, Reporting, and Data Sharing Framework** Summarizes how Urban Promise Zone Lead Organizations will be asked to share information with the federal government, including Promise Zone activities, funding secured, and performance and outcomes data.

**Data Walks: An Innovative Way to Share Data with Communities** Focuses on data sharing as the platform for collaboration, and can be used regardless of whether the community has been engaged from the beginning. A data walk is used to share key data and findings with community residents and program participants, ensure a more robust analysis and understanding of the data, inform better programming and policies to address both the strengths and the needs of a community or population, and inspire individual and collective action among community agents.

**Living Cities: Data-Driven Feedback Loops** Provides a series of templates/options for developing data-driven feedback loops that will help change behavior and create Collective Impact.

**Creating and Using Community Report Cards** Includes purpose, steps, and examples for reporting progress on community goals.

**How Do We Create a Scorecard and What Do We Do With It?** A step-by-step guide to reporting data (in plain language) using the principles of Results Based Accountability.