

Use of the Collective Impact Tool (CIAT) in Partnership Formation and Project Planning

‘Outcome strength + partnership strength = impact’

<https://meltonciat.com>

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‘With the emphasis placed on the importance of quantitative data by governments and other clients, the CIAT’s ability to convert qualitative information to quantitative measurements makes the evaluation process much more powerful.’ (Dr Jude Walker, FutureWorking)

The formation of partnerships between organisations or community groups has long been seen as an effective means to solve problems and a means to address common social, economic, cultural or environmental issues. Partnerships are at their best when identified needs and actions to address those needs are similar or ideally aligned between participating groups. Partners taking action to address an entrenched issue applied over time has an increased likelihood of achieving a collective impact.¹

There have been a number of tools developed to measure the strength of partnerships. The difference with the [Collective Impact Assessment Tool](#)² (CIAT) is that it has the ability to rate partner strength individually and collectively and most importantly, it has the added advantage of measuring the level to which a partnership meets agreed project outcomes and success measures. This provides an indicator of the collective impact made by the partnership. CIAT is designed to integrate the measurement and evaluation of these aspects and graph them by measuring:

1. An individual organisation or community group’s contribution to a partnership;
2. The overall strength of the partnership; influencing
3. How successful the partnership has been in achieving its agreed goals and strategies.³

Whilst the use and benefits of CIAT can be found in the [Collective Impact User Guide](#) there are some points to be made or lessons learned whilst implementing it. As a result of our experience in implementation of the CIAT, it was felt that more needs to be said about how CIAT can be most effectively used as a planning tool in partnership development and the project planning process.

It was found that introducing CIAT right at the beginning of the planning process and embedding it throughout the implementation phase of partnership plans provides the best results. The application of CIAT throughout the life of a project ensures that the planning process adheres to best practice principles, provides valuable ongoing data that informs the next steps and provides benchmarks for future planning.⁴

That best practice requires spending time at the formation stage of a partnership to negotiate ‘the ground rules’, identify each partner’s role, their predicted level of engagement and what contribution of people and resources will be made. This will go a long way to strengthening relationships and sustaining the partnership over time.

¹ In the context of this paper it is assumed that partnerships are formed to devise, plan and implement projects that address common issues and concerns.

² <https://meltonciat.com>

³ Melton City Council (2018), User Guide, Collective Impact Assessment Tool (CIAT): https://meltonciat.com/CIAT_User_Guide.pdf.

⁴ Wheeler L. & Wong, S. 2013, Learning as a Driver for Change: Learning Community Framework, Australian Centre of Excellence for Local Government, University of Technology, Sydney. Download free at:
https://www.uts.edu.au/sites/default/files/ACELG_Report_Learning_as_Driver_for_Change_03062013.pdf

‘Management Governance Australia is using the CIAT in a number of initiatives to build, through measurement, strong partnerships that deliver sustainable change for communities. These initiatives include Learning Communities and workforce development partnerships at the local and regional levels.’ (Bernadette O’Connor, Director, Management Governance Australia)

To achieve a “collective impact”⁵ each partner must commit to make some level of contribution and agreed course of action that they agree to take in a project. Generally, the level of contribution given by each partner to a project will depend on how close the project objectives are to their own organisation strategic objectives, or in the case of community members, their needs and interests. Where the outcomes sought by a project partnership coincide with the strategic objectives of partner organisations that have budget resources allocated to them there is an argument for resource sharing arrangements to be entered into. This can be done through memoranda of understanding, resource sharing agreements or terms of reference for example. Whatever the manner of agreement economies of scale can be achieved and duplication of resources and programs minimised. Aligned strategic objectives between organisations can also be a means of identifying potential project partners.

Once the issue to be addressed has been identified and the partnership formed it is important to carefully frame and describe the project, the outcomes sought, the measures that indicate whether or not the outcomes are being met and the evidence that supports the level achieved. It is recommended that this is entered in a planning template (see example at the end). This template acts as a working document that can and should be updated regularly by the project manager (3-6 monthly). By using a template such as this, the data required for the CIAT is generated and can be cut and pasted into the CIAT for an annual assessment of collective impact.

At this stage of planning, partners and/or the project manager can enter each partner’s predicted level of engagement and contribution into the partner engagement and contribution ratings section of CIAT. This allows partners to monitor their level of engagement in the project over time, individually and as a group. It is critical that this process is transparent and that partners know and understand that their contribution and level of engagement will be assessed and entered into the CIAT and that consequently, they are being held accountable for their agreed level of commitment.

Right from the outset, this acknowledges that all contributions to a project, no matter how large or small, are valued. It is useful to recognise that partner contribution may change over time depending on individual circumstances - for example, budget changes or changes in an organisation’s strategic direction. Adjustments to the CIAT partner engagement and contribution data can be made accordingly. Revisiting the partner engagement and contribution data adjusted or ‘averaged’ over the life of a project will add reliability to what are subjective assessments.

When using CIAT through the planning and implementation process it is important to be consistent with terminology. For example, instead of using words like objectives or aims use ‘outcomes sought’. It has been found useful to mention the imperative or need for the project along with the outcomes sought in the program description.

⁵ The underlying premise of Collective Impact is that ‘no single organization can create large-scale, lasting social change alone’: <https://collaborationforimpact.com>

For example:

Project: *Youth Pathways*

Outcomes Sought: *All young people have the support and opportunity to plan and pursue career pathways from school to vocational education, training, higher education and employment.*

It is important that strategies and actions mentioned in the project description and outcomes sought are reflected in the targets and measures.)

So, continuing the example above:

Measures (including target/s and data source):

3% improvement over three years of school completers participation in higher education, apprenticeships, traineeships, certificate IV and above courses and full-time employment (Department of Education 20XX).⁶

Using the CIAT for assessment

'Having used the CIAT as an assessment tool in a number of projects now, I really value having a clear and visual demonstration of partnership strength and impact.' (Diane Tabbagh, Coordinator Learning Community at Wyndham City Council)

The project manager should insert the outcomes data gathered from reports into the CIAT at an appropriate stage in the project cycle – we suggest annually but this can be flexible. The assessment of partner strength is ideally done with and by the partners. This may be, for example, in a face-to-face meeting, online or by self-assessment.

Once all the data is entered, the resultant Impact Assessment Graph should then be used to discuss the effectiveness of the project to date. The reasons for the impact achieved can be explored and new strategies developed on the basis of the findings.

To summarise, the following process lays the foundation for a template that incorporates CIAT in the planning process:

1. Use an evidence base to identify pressing need or issue to be addressed and benchmark data;
2. Identify potential partners that have a stake in addressing the need or issue;
3. Establish goals, agreements and values of the partnership.
4. Identify a project manager or lead. The initiator of the project may not necessarily provide the lead. An organisation with a high stake or funding to address the need or issue may be the lead;
5. Develop an Action Plan, impact indicators outcomes and measures;
6. Identify partner engagement and contribution to deliver the plan;
7. Identify and acquire resources to implement the plan;
8. Describe the project and its desired outcomes and enrol partners into CIAT;
9. Enter agreed impact indicators into CIAT; and

⁶ Examples of recent Learning Community Strategies that incorporate the CIAT for evaluation are at: <https://www.melton.vic.gov.au/Out-n-About/Libraries-and-learning/Learning/Community-Learning-Plan> and https://www.wyndham.vic.gov.au/sites/default/files/2019-02/WCC_LearningStrategy_A4%20final%202019%20online.pdf

10. Implement monitor and evaluate the project.^{7,8}

Sample CIAT data and reporting template

- A 'working document' such as this is a useful way to ensure that the data required for a CIAT Assessment is collected during the life of a project.
- The template can be set up as a Table or a Spreadsheet.
- Columns can be added to include other data you may find useful such as 'Comments'.
- Information inserted into the template can then be cut and pasted directly into the matching components of the CIAT.

So, using the example above, the table could look like this:



Collective Impact Assessment Tool Project Planning Template

Project Name:
Project Description:
Project Manager:

Section 1: Outcomes and Measures

Outcomes Sought	Strategy	Baseline Data	Outcome Measure	Project Timeline Milestone	Rate Achievement 1st Milestone	Rate Achievement 2nd Milestone	Comments	Status
	<i>Process to Achieve the Outcome</i>	<i>Data serving as a basis for comparison</i>	<i>Data demonstrating level of success</i>	<i>Periods, Dates or Years</i>	<i>Evidence of progress against target - include date of report</i>	<i>Evidence of progress against target - include date of report</i>		Not Started In Progress Completed
1.								
2. etc.								

⁷ CIAT was developed for the City of Melton's Community Learning Board by Peter Blunden, Shanti Wong, Ian Wong and Leone Wheeler. CIAT can be accessed at <https://meltonciat.com>

⁸ Tools for planning and evaluation can be found in: Wheeler, L., Wong, S., Blunden, P. 2014. *Learning Community Framework and Measuring Impact Toolkit. Volume 2*. Australian Centre of Excellence for Local Government, University of Technology, Sydney. Download free at: <https://opus.lib.uts.edu.au/bitstream/10453/42098/4/Learning-Communities-Framework-and-Measuring-Impact-Toolkit-Vol2-Toolkit.pdf>

Section 2: Partners

Project Partners	Nominated Partner Contact & Role	Outcomes Addressed by Partner	Predicted Contribution & Engagement Levels (High, Medium, Low)	Updated Contribution & Engagement Levels (High, Medium, Low)	Final Partner Contribution & Engagement Levels (High, Medium, Low)	Evidence
1.						
2. etc.						