

# Measuring Progress

## Qualitative Rubrics to Quantitative Comparisons



**Leading by Convening: Bringing It All Together**

# REFLECTION AND DATA COLLECTION

- In a face-to-face meeting
- Responses submitted and tallies explored at a meeting
- Data collection over time

## Coalescing Around Issues Rubric

Coalescing Around Issues	Depth of Interaction			
	Informing Level (Sharing/Sending)	Networking Level (Exchanging)	Collaborating Level (Engaging)	Transforming Level (Committing to Consensus)
<b>Acknowledging and valuing diversity.</b>	A core group of interested stakeholders disseminates information to potentially interested stakeholders, across roles, to inform them about issues and invite them into the discussion.	Stakeholders from diverse roles exchange ideas and resources with one another. Clarification of role-specific vocabulary is at beginning stages. Outreach to others with a specific focus on roles not yet involved continues.	Diverse stakeholders engage in dialogue about issues. Differences are acknowledged and explored. A common vocabulary begins to emerge.	Diverse stakeholders with diverse perspectives are engaged through multiple ways in active collaborative dialogue about issues in order to reach consensus about priorities and future research, policy and practice opportunities.
<b>Researching and agreeing on relevant data.</b>	Personal and professional experiences (anecdotal) are the primary source of evidence for consideration.	Stakeholders consider what other data beyond personal stories could be a source of evidence and begin collecting relevant data and resources.	Stakeholders identify relevant data from across disciplines and examine for common themes for understanding (collective analysis).	Through consensus, stakeholders agree on the anecdotal and research data from various perspectives and sources relevant to the issue.
<b>Decision making through consensus.</b>	Core group identifies an issue of importance.	Stakeholders contribute to the discussion, bringing in other perspectives.	Stakeholders contribute to and create a shared vocabulary. They reach across systems to review, critique and revise and/or confirm the issue to be addressed.	Through consensus, stakeholders determine the specific aspects of the issue that the group will move forward to influence.
<b>Coalescing to move to future work together.</b>	Core group intentionally shares with others, who are not already stakeholders, the reason for caring about this issue, meeting one-on-one with targeted persons, organizations, etc.	Stakeholders are intentional about inviting new members into the group work and being purposeful in getting the people in the same room to work together.	Stakeholders develop grounding documents (mission, vision, guiding principles and ground rules). Stakeholders develop and agree on a process of continued communication that fits their needs.	Through consensus, stakeholders develop a set of actionable goals that define the work scope of the effort. Relationships are built for strategic advantage.

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<b>Researching and agreeing on relevant data.</b>	Personal and professional experiences (anecdotal) are the primary source of evidence for core group. <b>70%</b>	Stakeholders consider what other data beyond personal stories could be a source of evidence and begin collecting relevant data and resources. <b>30%</b>	Stakeholders identify relevant data from across disciplines and examine for common themes for understanding (collective analysis).	Through consensus, stakeholders agree on the anecdotal and research data from various perspectives and sources relevant to the issue.
<b>Decision making through consensus.</b>	Core group identifies an issue of importance. <b>90%</b>	Stakeholders contribute to the discussion, bringing in other perspectives. <b>10%</b>	Stakeholders contribute to and create a shared vocabulary. They reach across systems to review, critique and revise and/or confirm the issue to be addressed.	Through consensus, stakeholders determine the specific aspects of the issue that the group will move forward to influence.
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<b>Researching and agreeing on relevant data.</b>	Personal and professional experiences (anecdotal) are the primary source of evidence for [redacted] <b>70%</b>	Stakeholders consider what other data beyond personal stories could be a source of evidence and begin collecting [redacted] data and resources. <b>30%</b>	Stakeholders identify relevant data from across disciplines and examine for [redacted] clues for understanding (collective analysis). <b>40%</b>	Through consensus, stakeholders agree on the anecdotal and research data from various perspectives and sources relevant to the issue.
<b>Decision making through consensus.</b>	Core group identifies an issue of importance. <b>90%</b>	Stakeholders contribute to the discussion, bringing in other perspectives. <b>90%</b>	Stakeholders contribute to and create a shared vocabulary [redacted] across systems. [redacted] critique and revise and/or confirm the issue to be addressed. <b>10%</b>	Through consensus, stakeholders determine the specific aspects of the issue that the group will move forward to influence.
<b>Coalescing to move to future work together.</b>	Core group intentionally shares with others, who are not already stakeholders, the reason for caring about this issue, meeting one-on-one with [redacted] persons, organizations, etc. <b>90%</b>	Stakeholders are intentional about inviting new members into the group work and being purposeful in getting the people [redacted] the room to work together. <b>10%</b>	Stakeholders develop grounding documents (mission, vision, guiding principles and ground rules). Stakeholders develop and agree on a process of continued communication that fits their needs.	Through consensus, stakeholders develop a set of actionable goals that define the work scope of the effort. Relationships are built for strategic advantage.

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<b>Researching and agreeing on relevant data.</b>	Personal and professional experiences (anecdotal) are the primary source of evidence for <b>70%</b>	Stakeholders consider what other data beyond personal stories could be a source of evidence and begin collecting that data and resolving <b>30%</b>	Stakeholders identify relevant <b>100%</b> across disciplines and examine for <b>40%</b> lines for understanding (collective analysis).	Through consensus, stakeholders agree on the anecdotal and research data from various perspectives and sources relevant to the issue.
<b>Decision making through consensus.</b>	Core group identifies an issue of importance. <b>90%</b>	Stakeholders <b>20%</b> to the discussion, <b>90%</b> other perspectives <b>10%</b>	Stakeholders <b>80%</b> contribute to and <b>10%</b> reach across systems, critique and revise and/or confirm the issue to be addressed.	Through consensus, stakeholders determine the specific aspects of the issue that the group will move forward to influence.
<b>Coalescing to move to future work together.</b>	Core group intentionally shares with others, who are not already stakeholders, the reason for caring about this issue, meeting one-on-one with <b>90%</b> persons, organizations, etc.	Stakeholders are intentional about inviting new members into the group work and being purposeful in getting the people <b>100%</b> the room to work together. <b>10%</b>	Stakeholders develop ground <b>100%</b> (mission, vision, guiding principles and ground rules). Stakeholders develop and agree on a process of continued communication that fits their needs.	Through consensus, stakeholders develop a set of actionable goals that define the work scope of the effort. Relationships are built for strategic advantage.

# ASSESSING THE IMPACT OF ENGAGEMENT ON PRACTICE CHANGE

- Revisit the agreed upon data sources.
- How do engagement indicators align with practice change data?
- How can the two data sets help you plan next steps?

# ONLINE TOOL: SAMPLE SURVEY ITEM

## THE PARTNERSHIP WAY

### Coalescing around Issues

**Please read each question and think about the work you are doing together. Then, choose the response that best describes the way stakeholders come together around the issues.**

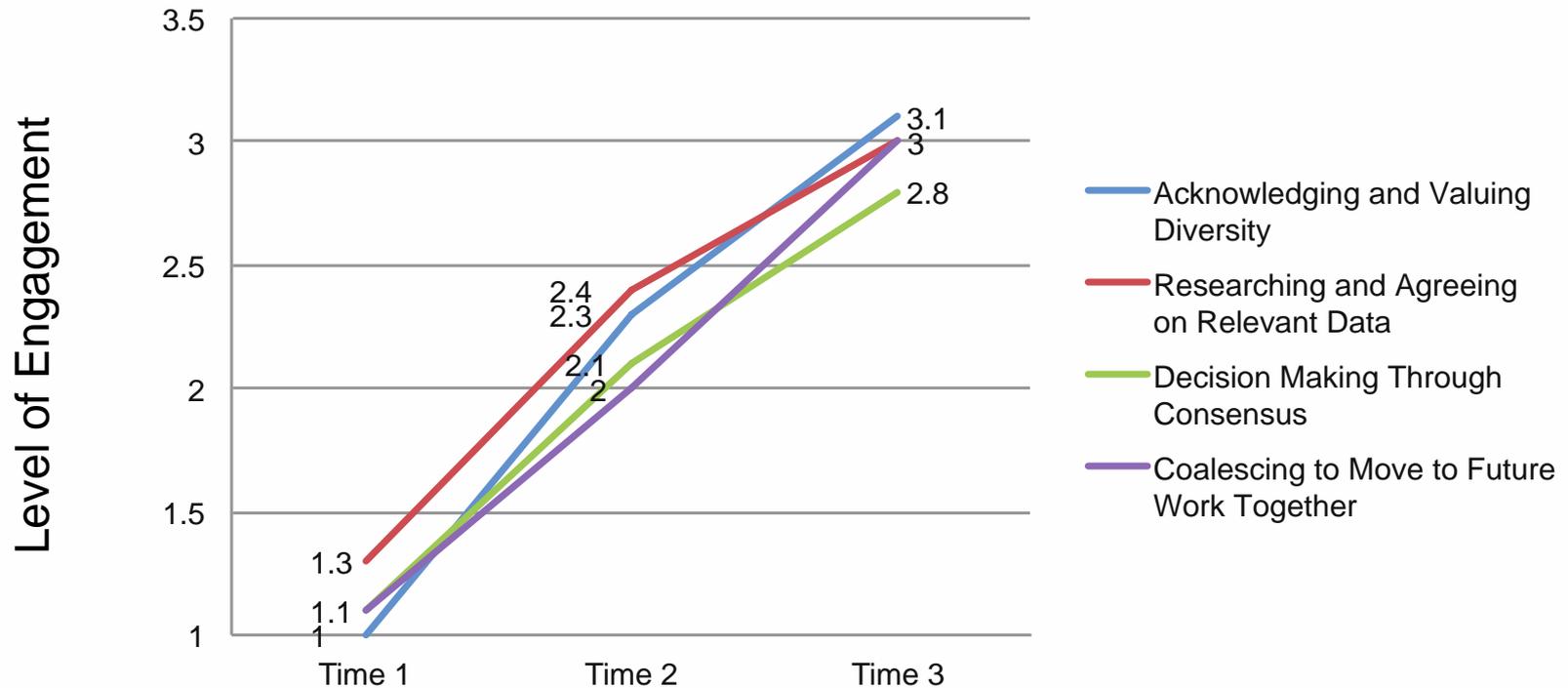
#### **1. To what extent does the group acknowledge and value diversity?**

- A core group of interested stakeholders disseminates information to potential stakeholders, across roles, to inform them about issues and invite them into the discussion.
- Stakeholders from diverse roles exchange ideas and resources with one another; clarification on role-specific vocabulary is at the beginning stage; outreach to others continues, with a specific focus on roles of stakeholders who are not yet involved.
- Diverse stakeholders engage in dialogue about issues. Differences are acknowledged. A common vocabulary begins to emerge.
- Diverse stakeholders, with diverse perspectives, are engaged in multiple ways through active dialogue around issues in order to reach consensus about priorities and future research, policy and practice opportunities.

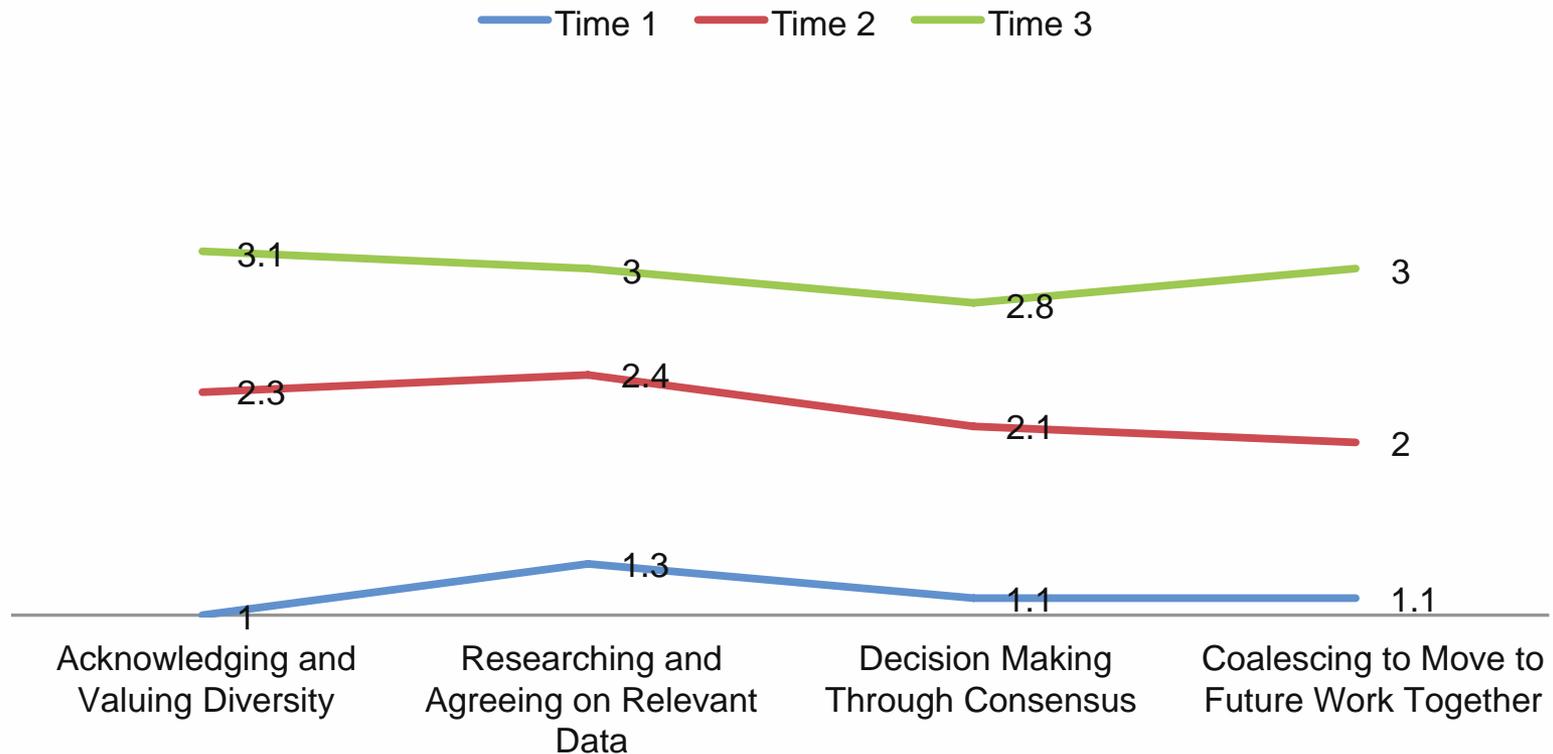
#### **2. To what extent does the group research and agree on relevant data?**

- Personal and professional experiences (anecdotal) are the primary source of evidence for consideration.
- Stakeholders consider what other data - beyond personal stories - could be a source of evidence and begin collecting relevant data and resources.
- Stakeholders identify relevant data from across disciplines. They examine the information for common themes. They analyze the data together for shared understanding (collective analysis).
- Through consensus, stakeholders agree on the anecdotal and research data that is relevant to the issue. They consider and seek data sources that represent various perspectives on the issue.

# Coalescing Around Issues



# Coalescing Around Issues





## Leading by Convening: A Blueprint for Authentic Engagement

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# Notes for PowerPoint Presentation, Measuring Progress: Qualitative Rubrics to Quantitative Comparisons

### **Slide 1**

Measuring Progress: Qualitative Rubrics to Quantitative Comparisons

### **Slide 2**

It is somewhat difficult to envision progress in relationship building as data that can be seen and interpreted by minds accustomed to numerical representations. As relationship building is central to leading by convening, it is important to look at how we can measure progress within the group and ensure that data are representative of growth in the human and adaptive element of change. We have designed some tools that will allow you to generate data on your interactions. These data will help you understand the growth of critical relationships. Several rubrics are provided in the blueprint. You may want to work on one or all depending on your plan for engagement. For illustrative purposes, let's take a look at the reflection rubric associated with the habit of coalescing around issues.

### **Slide 3**

Descriptors in each cell refer to relationship building and the interactions of those coming together around an issue. From the descriptors you can see that this is a qualitative rubric rather than a quantitative one. As a person reflects on this rubric he or she identifies the depth of interaction for each theme; themes of diversity, data, decision making and future work. A suggestion for use that results in group data is to first create a wall chart of the rubric. If it's not practical to reproduce the chart completely for the wall, creating a blank grid and having an individual copy of the rubric for each to read also works fine.

### **Slide 4**

When the group gathers each person reads, reflects and rates the current status of coalescing. For ease of demonstration this group has 10 members. Each of the 10 members has four dots, one dot for each theme. As each reads and reflects on the theme of Acknowledging and Valuing Diversity he or she places a dot in the cell that most accurately describes his or her individual perception of current status of the group's interactions. It is important to note that each dot should be placed clearly within the cell. When a dot is placed on a vertical line it may be interpreted that the person thinks the descriptors in the cell to the right have not quite yet been met. So, all descriptors in the right being not yet met, means that the ones met are the ones to the left. This process is then repeated for researching and agreeing on relevant data, as well as for decision making through consensus and coalescing to move to future work together.

### **Slide 5**

The number of dots in each cell is then converted to a percentage in relation to all dots in the row. The conversion from raw number of dots to a percentage is important, as the number in the group will change from time to time making raw data not useful for comparison, while conversion to a percentage can be compared over time.

### **Slide 6**

A second group reflection is then scheduled for a later date—let's say three to six months later. At this time group members each have another four dots of a different color. The process is repeated for each theme, reflecting on the status at this point in time.

### **Slide 7**

Again, the number of responses in each cell is converted to a percentage. From these data we can see that increased depth of interactions has evolved.

### **Slide 8**

In another three to six months, the group stops to think about current status again. Still for ease of demonstration we have 10 persons in the room. However, two of the original persons are not present this time, and two others who have joined the group at differing points throughout the year and are now in attendance for this activity. This may account for the green dots that appear in the networking cell while the other members see the work more in the collaboration cell. This is not unusual and should be expected as continuous outreach and changing group dynamics are typical in leading by convening.

### **Slide 9**

This third assessment is then converted to percentages. Change during the time period can be seen easily by both looking at the positions of the dots and the numerical data.

### **Slide 10**

You will want to analyze the engagement data against your progress on outcomes. This will help you understand and articulate just how interaction contributes to results. This slide offers some important questions for your stakeholders to explore together.

### **Slide 11**

If you want to engage large numbers of participants, or if you prefer electronic data collection, you can use the text of the rubrics to create an online survey using any of the commercially available survey tools. This sample slide shows you how you can create your own online tool.

### **Slide 12**

Commercial survey programs have graphing software built in that will allow you to create data displays (as in Slides 12 and 13) that allow you to communicate progress simply.

### **Slide 13**

Note: This is a sample slide for data display.

### **Slide 14**

By whichever means reflection takes place, it is important to engage in the process on a regular basis, to take stock of the current status and to consider next steps in growing together and deepening the level of interactions among the themes of each of the three habits in leading by convening.