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Using Data to Advance a Postsecondary Systems Change Agenda

COMMUNITY PARTNERSHIPS
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OMG CENTER FOR COLLABORATIVE LEARNING

About the OMG Center

Headquartered in Philadelphia, PA, the OMG Center for Collaborative Learning (OMG) provides evaluation and philanthropic services to social sector organizations. Our areas of focus include “cradle-to-career” education, asset development, community health, diversity leadership, and arts and culture, among other fields. For 30 years, our clients have been major private and community foundations, government organizations, and national and regional nonprofits. Within the field of postsecondary access and success, OMG has worked on an array of major national and regional initiatives for organizations such as the Bill & Melinda Gates Foundation, the Lumina Foundation for Education, the Citi Foundation, the Strive Network, Achieving the Dream, Campus Compact, and the California Career Advancement Academies.

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Amarillo, TX
Boston, MA
Brownsville, TX
Charlotte, NC
Dayton, OH
Jacksonville, FL
Louisville, KY
Mesa, AZ
New York, NY
Philadelphia, PA
Phoenix, AZ
Portland, OR
Raleigh, NC
Riverside, CA
San Francisco, CA

The individuals and organizations that forged partnerships in each of these communities are singularly committed to establishing a legacy of college success, and we celebrate them for those efforts. We are also grateful for their contributions as thought partners, and their insights have helped the OMG Center shape and refine what we learned over the course of the initiative.

Introduction

Nationally, 52% of 2011 U.S. high school graduates and GED earners from low-income families enrolled immediately in a two- or four-year college, compared to 82% and 66% of their high- and middle-income counterparts, respectively (U.S. Department of Education, the Condition of Education, 2013). Once they enroll in college, low-income youth face a number of academic and non-academic obstacles, making it more difficult to succeed. Given the increasing demand for a workforce with postsecondary credentials and the rising costs of a college education, low-income youth in the U.S. are faced with significant challenges in their pursuit of living wage employment. Postsecondary completion continues to evolve as a hot bed issue nationally, at the state level, and in individual communities.

As philanthropies and nonprofits have acknowledged the scope of these challenges, so too have they recognized that simply creating new programs, while important, will not solve the problem. Larger system and structural barriers need to be addressed if more students are going to earn postsecondary credentials and degrees.

Philanthropies and social investors are recognizing that "place matters," and see the potential of place-based strategies for catalyzing system changes. Local communities offer a scale at which cross-sector, systemic challenges can be addressed, and provide opportunities to affect significant numbers of students. In fact, at the time of writing this Issue Brief, we can account for more than 20 national initiatives supported by federal government and national philanthropies that focus on "place-based" strategies.

This Issue Brief presents lessons from our three-year evaluation of the Bill & Melinda Gates Foundation's Community Partnerships portfolio and illustrates how communities can implement multi-sector strategies to shift local systems and improve student postsecondary completion.

OMG'S EVALUATION

The goal of our developmental evaluation was to gain a clearer picture of how communities build partnerships; engage stakeholders; use data; and create, align, and shift policies and practices to increase postsecondary success. Our methodology did not entail judging the effectiveness of communities' approaches against a predetermined set of measures.

About the Bill & Melinda Gates Foundation's Community Partnerships Portfolio

With a 2025 goal of doubling the number of low-income students who earn a postsecondary degree or credential with genuine value in the workplace by age 26, the Bill & Melinda Gates Foundation invested more than 20 million dollars in the Community Partnerships portfolio. The objective was to understand what it takes for cross-sector partnerships to advance a community-wide postsecondary completion agenda that instigates system-level changes (described in the following section) and ultimately improves postsecondary completion outcomes for students.

From 2009-2013, seven communities received Community Partnerships funding through two sister initiatives — Communities Learning in Partnership (CLIP) and Partners for Postsecondary Success (PPS) — to develop and implement a multi-sector strategy that included community and four-year colleges, K-12 school districts, municipal leaders, local businesses, community-based organizations, parents and students, and others. Communities also received support from an intermediary partner who provided technical assistance and coaching support throughout the grant period: the National League of Cities' Institute for Youth, Education, and Families worked with CLIP cities and MDC Inc. worked with PPS cities. An additional eight communities were involved in the portfolio as affiliate cities, participating in regular convenings, phone calls, and webinars with the seven implementation sites.

COMMUNITY PARTNERSHIPS PORTFOLIO COMMUNITIES

CLIP	CLIP Affiliate Sites	PPS
Mesa, AZ	Boston, MA	Amarillo, TX
New York, NY	Dayton, OH	Brownsville, TX
Riverside, CA	Jacksonville, FL	Raleigh, NC
San Francisco, CA	Louisville, KY	
	Philadelphia, PA	**PPS Affiliate Site**
	Phoenix, AZ	Charlotte, NC
	Portland, OR	

About the Community Partnerships Theory of Change

The Community Partnerships sites used a loosely defined Theory of Change (TOC) to help communities set parameters to plan and implement their respective postsecondary success strategies.

Three basic premises drove the Community Partnerships investment:

URGENCY	COLLABORATION	SCALE
If college access and success systems remain unchanged, they will continue to produce the same unacceptable postsecondary completion outcomes for low-income young adults.	Communities that change the way people and organizations work and work together can impact system-level changes and move the needle on postsecondary success outcomes community-wide.	Communities that enact system-level changes can support measurable changes in student success across a community.

The TOC stipulated that cross-sector partnerships would use data and leverage key stakeholder commitment to align policies and practices to promote postsecondary success. In other words, evidence of systems change would emerge across four mutually reinforcing areas, illustrated in Figure 1. If we saw evidence of change across these four areas, then we would know that the "system" had in fact shifted.

FIGURE 1: COMMUNITY PARTNERSHIPS AREAS FOR SYSTEMS CHANGE

This Issue Brief focuses on the area of **USING DATA**, and addresses two questions:

1. WHY use data to advance a postsecondary systems change agenda?

2. HOW can communities use data to advance a postsecondary systems change agenda?

Why Use Data to Advance a Postsecondary Systems Change Agenda?

The initial premise of "using data" to drive a postsecondary completion agenda was two-fold: 1) to help communities set public, highly visible postsecondary completion goals to keep key stakeholders accountable and 2) to help inform the work of partners as they began tackling policy and practice changes. In reality, the focus on data had much broader implications for the Community Partnerships work, as it served as an important tactic to help sites build commitment for their postsecondary completion agendas. As well, the sites used data to break down siloes, foster joint conversations about postsecondary success, and provide a process to address common challenges and solutions.

Sites collected and used data for three primary purposes:

1. To **build public commitment** to, and awareness of, the postsecondary success agenda
2. To set priorities for **policy and practice changes**, and measure progress made toward achieving those priorities
3. To monitor the partnership's **internal structures and processes**

While sites used publicly available data to build awareness of postsecondary success, they required more granular proprietary data from institutional and organizational partners to set and assess progress of policy and practice changes. The communities making the most progress with data analyzed and used publicly available data, and created new datasets — integrating information from school districts, higher education systems, and nonprofit partners. These data helped partners answer more nuanced questions about postsecondary success in their community, and address the needs of specific sub-populations of interest.

On the other hand, communities with little experience in addressing postsecondary success, and/or limited data capacity, advanced both by carefully repackaging and thoughtfully reframing and presenting publicly available data.

Fewer sites used data to help manage their partnerships. However, through the Community Partnerships portfolio, sites had access to ongoing evaluation and intermediary support to improve their partnerships' operations.

How Can Communities Use Data to Advance a Postsecondary Systems Change Agenda?

Four lessons from the Community Partnerships portfolio evaluation have implications for how communities can use data:

- **Take time to build relationships** and structures to support data use and interpretation
- **Target the right data** to the right consumers
- **Include a wide range** of data capacities
- **Disaggregate and consider data** from a variety of perspectives

Take time to build relationships and structures to support data use and interpretation: Investigate and interpret quantitative data with a sensitivity to, and understanding of, the unique contextual and cultural factors influencing institutions, partnerships, and communities. Build cross-partner understanding, shared language, and trust before drawing conclusions about the numbers.

Charged with setting a public completion goal, sites immediately set out to understand the college access and success rates in their communities. Most sites assembled a group of data- and research-savvy partners to take a deep — mostly quantitative — look at the academic trajectories of youth in their region. Sites that began crunching numbers and presenting data to partners produced reports quickly, but often spent significant time explaining and defending their findings, easing partner tensions, revising reporting processes and definitions, and reconciling stakeholders' interpretations of the data. On the other hand, sites that took time to understand partners' data capacities, and created common definitions about the data being investigated, benefited from much stronger partner relationships and a sustained commitment to using data for continuous improvement. In New York City, partners from the K-12 and community college system spent nearly a full year understanding and reconciling differences in definitions, aligning the timing of data pulls, and developing shared student "flagging" approaches. Furthermore, while the two partners initially conducted separate analyses, they then shared their respective results, and worked to address any analytical inconsistencies.

While the types of data that partners considered were sometimes different, the process of using data often was the same: (1) establishing ways to work together, (2) setting goals and data strategies, (3) collecting, aggregating, and analyzing data, (4) engaging in data inquiry and interpretation, and (5) communicating messages and results to a broader group of stakeholders. While these steps usually were not linear, nor necessary in every circumstance, a common set of data activities emerged across communities (see Figure 2):

FIGURE 2: COMMON DATA STEPS AND ACTIVITIES

1. WORKING TOGETHER
- Confidentiality agreements for data sharing and use
- Development of data-sharing agreements
- Development of data warehouses, or joint data systems, for cross-institutional data collection
- Development and assignment of data roles and responsibilities

2. SETTING GOALS AND DATA STRATEGIES
- Selection of research questions for exploration and inquiry
- Selection of partnership goals and interim measures of progress
- Joint selection and negotiation of accountability metrics
- Development of qualitative data collection strategies (e.g., identifying purpose of data collection, methods, and participants)

3. COLLECTING, AGGREGATING, AND ANALYZING
- Joint discussion about common definitions of quantitative data variables
- Alignment of data collection and reporting timelines
- Data sharing or extraction of data
- Data cleaning and analysis
- Report development and refinement

4. ENGAGING IN DATA INQUIRY AND INTERPRETATION
- Sharing of data reports
- Discussions about data results and factors underlying trends
- Sharing of data findings internally among partner organizations
- Setting and refining strategic direction and/or specific actions

5. COMMUNICATING MESSAGES AND RESULTS
- Communicating messages and results to a broader group of stakeholders

Putting Lessons into Practice

- ✓ Understand how partners talk about their work and how data are used within their organizations
- ✓ Develop common definitions for the data points that matter most for public reporting, shared understanding by each partner, and assessing the partnership's strategy
- ✓ Assess partners' data capacities and comfort with sharing data — these will differ across sectors and among partners
- ✓ Understand partners' data collection, analysis, and reporting needs. Create processes that can meet the needs of the partnership and its members.
- ✓ Create guidelines for data sharing, analysis, and communications. Clarify who will see what data, and when, so partners can feel confident that their sensitive information will not be misinterpreted or end up in the local press.
- ✓ Reaffirm with partners the role that data play in supporting student success. It is easy to get lost in the technical details of data collection and analysis; keeping an eye on the partnership's overarching goal helps maintain momentum.
- ✓ Develop a communications plan before going public with any data. Consider a "soft launch" with contributing partners before releasing data.

Formalizing a Cross-Institutional Data Initiative in New York City

The New York City Department of Education (DOE) serves 1.1 million students, and the vast majority of high school graduates enroll in the City University of New York (CUNY). Given this pipeline, the DOE has long considered it imperative to share data about its students with CUNY. Catalyzed by the Community Partnerships investment, one of the goals of Graduate NYC! was to create a joint DOE-CUNY data warehouse that would help both partners assess the impact of their college access and retention policies and practices. The initiative was supported by a data-savvy Mayor Bloomberg. Leveraging several years of relationship building that pre-dated the Community Partnerships investment, Graduate NYC! partners from DOE and CUNY identified concise postsecondary goals and metrics, and addressed definitional issues (i.e., developing common definitions for indicators such as "persistence," "cohort," and "graduation"). DOE and CUNY researchers separately conducted the first set of analysis on the shared data, but then came together to discuss and reconcile differences in their findings. Through this process — though time-consuming — DOE and CUNY ensured that their analysis is bound by a uniform set of parameters that eliminates differences in interpretation, and, most importantly, enables them to uniformly answer questions from external partners.

Target the right data to the right consumers: While data transparency is critical to strong partnerships, too much data can overload and overwhelm. Provide people with the right level of data detail, so they can make decisions and do their work.

Partners need different data at different points in time, depending on the focus of their work. Based on the experiences of Community Partnerships sites, a variety of data can and should be used for a variety of purposes, and often with different "consumers."

The three primary uses of data, their consumers, sample tools and processes that can facilitate data use, and examples of the right level of data detail, are outlined in Figure 3:

FIGURE 3: MULTIPLE DATA PURPOSES, CONSUMERS, SUPPORT TOOLS, AND DATA POINTS

Purposes		Building Commitment and Awareness	Setting Priorities and Measuring Progress Toward Policy and Practice Change	Managing Partnerships
Data Consumers	Community stakeholders	✓		
	Partners responsible for implementation	✓	✓	
	Leadership/Decision-making partners	✓	✓	✓
Data Tools and Processes		• Baseline indicator reports • Public report cards • Public scorecards	• Data facilitation and inquiry processes • Inquiry-driven data collection • External or internal evaluation	• Administrative processes • Environmental scans • External or internal evaluation
Data Points		• High school cohort graduation rates • Two- and four-year college graduation rates • First-year retention rates	• Math and English remediation rates for part-time, first-generation, and students of color • Semester-to-semester retention rates for students receiving priority enrollment • Academic performance for students benefiting from alternative placement policies	• Clarity of partner roles and responsibilities • Transparency of decision-making processes • Efficacy of partner recruitment and on-boarding processes

CONSIDER USING BOTH QUANTITATIVE AND QUALITATIVE DATA

Most sites initially focused on gathering and aggregating available quantitative data. However, many found the need for a more nuanced understanding of data trends, and considered ways to complement quantitative data with qualitative data, e.g., focus groups, stakeholder interviews, and community meetings. Qualitative data also helped partners design interventions that best met their target students' needs.

Partnerships can use a baseline indicator report — organizing public data or top-line institutional information (e.g., graduation and retention rates) into a coherent public report — to engage the community in a conversation about the state of postsecondary completion. Even publicly available data, which partners theoretically can access, are often not well understood by the community and other partners, and can offer opportunities for generating new insights about postsecondary success. Many sites, especially those with a nascent focus on postsecondary success, found that sharing and discussing data about postsecondary trends generated buy-in among partners and the public at large, as in the case of Brownsville, TX.

While useful for public messaging and accountability, top-level indicators rarely are detailed enough to help partnerships identify and assess actions to improve community trends. Making strategic decisions requires more granular data — often institutional data or primary data collected through qualitative methods like interviews, focus groups, or surveys. Additionally, sites that have set up systems to share individual student data across partners have opportunities for more targeted agenda setting and a clearer understanding of impact across the partnership. When working with more nuanced data, partners should first establish processes to discuss and interpret that information. In other words, structures to support inquiry often are as important as the data themselves.

Additionally, using data to monitor the partnership itself is important for ensuring that cross-partner activities are aligned and on track. The Raleigh partnership, for example, had each of its action teams establish a set of goals for its work; quarterly reports were then shared and reviewed to assess progress against each goal, serving as an accountability mechanism for the partnership. Establishing benchmarks of success — attendance at meetings, revenue raised, development of action plans, and achievement of short-term goals — can help partners understand what's "working well" and where the partnership needs to focus its efforts. These data may be especially critical in helping partners identify issues that have implications for the health and sustainability of the partnership; issues that might be difficult to raise without "objective" data.

Putting Lessons into Practice

- ✓ Consider what the intended audiences should do with the data they receive — e.g., build knowledge, help set direction, monitor progress, refine strategy, etc.
- ✓ Help partner groups understand the questions they are trying to answer, and the data they need to answer them; make sure that the questions are not dictated by the availability of data.
- ✓ Determine what data, and what level of detail, will be most useful for the intended audience. Align the level of detail and nuance with the expected actions.
- ✓ Avoid letting perfection stall partnership efforts; consider interim or proxy measures, historical data, or external and national research as ways to fill information gaps while establishing "ideal" data collection and analysis plans.

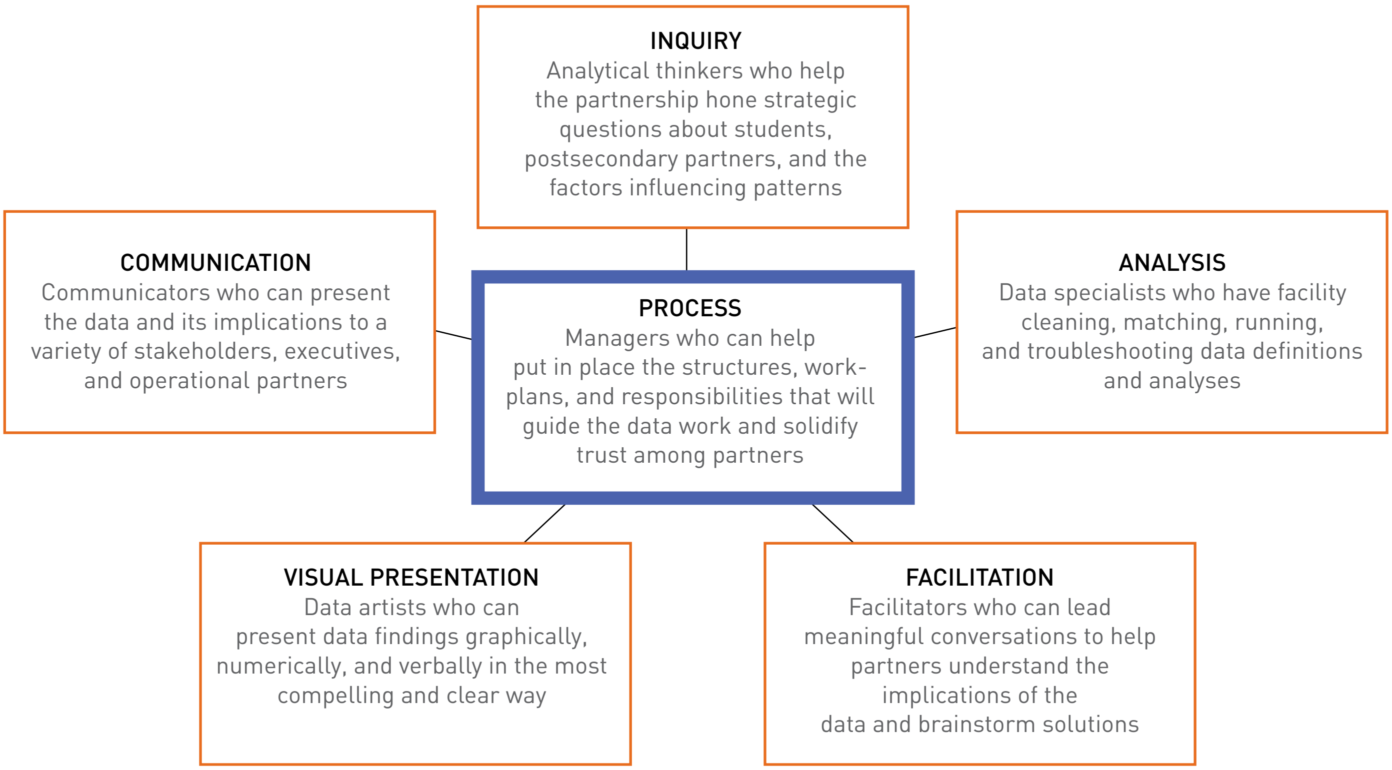
Establishing a Foundation for Data Use in Brownsville, TX

Early in the initiative, the Brownsville partnership identified college access and success indicators that they could share with the community as a tactic to build awareness. They convened data professionals from across core organizations and institutions, particularly individuals with technical expertise. After initial discussions, the group realized that institutional data and data systems would not easily answer their basic questions. Furthermore, they discovered they did not have a common understanding of the questions they were trying to answer. The group reconfigured the data team to include a broader range of expertise, and decided to use publicly available data, as it offered the quickest route to building trust among partners for data sharing. The Brownsville partnership released its final community indicators report in March 2013. In the report — which took almost one year to develop — the partnership analyzed community trends and described how it was using the data to address these trends. As a result of the report, partners gained a deeper understanding of the capacities needed to support data use. Brownsville's report is now serving as a model for other communities in the Rio Grande Valley.

Include a wide range of data capacities: Consider the varied skills needed to collect, analyze, present, interpret, and act on data, then assign responsibilities and authority to the organizations and individuals who possess those skills.

While many communities focused initially on data analysis, and the technical skills involved in merging data across systems, many quickly discovered that their partnerships needed to draw on a wide range of data capacities. The various data steps, from establishing ways to work together on data to communicating information, required a variety of critical "data capacities." Furthermore, these capacities were rarely found within one person, but rather a mix of individuals with different skills and levels of decision-making authority. The six data capacities that Community Partnerships sites used in their work are described in Figure 4:

FIGURE 4: DATA CAPACITIES



Sites that expanded their data capacities beyond analysis were more likely to effectively integrate data into their overall strategies. When sites solely focused on analysis, their use of data often remained siloed from the rest of the partnership's efforts.

Putting Lessons into Practice

- ✓ Conduct a "data capacities" inventory to determine which partners might have certain critical capacities (analytical, process, inquiry, facilitation, communication, and visual)
- ✓ Assemble a data team with the right mix of data capacities, levels of authority, representation of sectors, and diversity of partners
- ✓ Assess partners' influence and decision-making authority vis-à-vis their data capacities. An excellent facilitator might not have influence with executive decision makers, and an individual with strong technical skills may not be the most appropriate person to present the data or bring partners to a consensus on next steps.
- ✓ Consider including "data team" members on other working groups, to ensure alignment between the data work and partnership strategies

PROMISING SITE PRACTICE: USING DISAGGREGATED DATA TO FOCUS ON INEQUITY

San Francisco's Bridge to Success effort recognized that achievement rates differed greatly from neighborhood to neighborhood across the city and that African American and Latino students had disproportionately lower academic success rates. To better understand the obstacles and educational barriers that these populations faced, Bridge to Success supplemented its initial analysis with focus groups with students and parent advocacy groups in targeted neighborhoods. Through this detailed look at specific populations and their educational experiences, Bridge to Success was able to more accurately design pilot interventions for a subset of schools and students, before scaling their efforts across the entire school district and college.

Disaggregate and consider data from a variety of perspectives: Investigate data from the vantage point of various sub-populations and partners; do not let aggregate data obscure important nuances of what is really happening in the community.

An initial goal of the Community Partnerships portfolio was to double the number of low-income students who earn a postsecondary degree or credential with genuine value in the workplace by age 26. Sites adopted this goal from the onset, and focused on understanding what that meant in their respective communities. As part of that analysis, the sites examined specific sub-populations (e.g., city neighborhoods, socio-economic status, and demographic parameters) to uncover the greatest need. This focus on examining data about academic and workforce transitions, through various lenses, led to meaningful dialogue and investigation of factors influencing education disparities.

Several sites engaged a variety of stakeholders — administrators, front-line service providers, teachers and faculty members, employers, students, and community members — to help understand these data trends. As the work continued, however, sites lessened their focus on data disaggregation, and increasingly examined their data in the aggregate, potentially missing opportunities for more targeted interventions to support specific sub-sets of students (e.g., first-generation college goers, African American and Latino males, refugees, or low-income students). The sites' shifts in focus were driven by several factors, including the need for a succinct storyline, decisions to shy away from difficult conversations about inequity, and the need to reduce the burden on partners conducting the analysis.

Putting Lessons into Practice

- ✓ Spend considerable time up front investigating trends in postsecondary measures by sub-population
- ✓ Expand beyond demographic and socio-economic measures; consider geography (differences in neighborhoods or school catchment areas), immigration, or English-speaking status.
- ✓ Create a space for trusted conversations with diverse stakeholders to help interpret data trends; reach well beyond the usual suspects to include students, educators, counselors, and service providers.
- ✓ Consider including disparity measures in the analysis — for example, compare high-income and low-income student progress on key academic milestones
- ✓ Use disaggregated information to develop targeted approaches to reducing disparities
- ✓ Examine partnership progress and successes in the aggregate and by selected sub-populations — to assess strategies and ensure that solutions are reaching those who need them most

Some Concluding Thoughts

Through the Community Partnerships work, a more nuanced and diverse set of data uses emerged beyond the initial emphasis of using data to set and measure progress toward common goals. Partnerships used a variety of data for multiple purposes — to build commitment, to strengthen partnership, to identify and support policy and practice change — and ultimately drew on a range of capacities to support these efforts.

Using data can help drive systems change, but can also be an outcome of systems change efforts. Sharing and using data across institutional systems to achieve common goals, like postsecondary success and living wage employment, is a significant departure from the way our current systems operate. As in the New York City example, when communities develop systems to obtain and share data — particularly systems that partners have not had access to before — partners pay attention. In national, state, and local environments that are increasingly interested in data, partners are likely to sustain the efforts that offer access to data and answer new questions about their community and institutions.

As communities and funders continue to support postsecondary completion across the country, they must consider key questions as they work to create and strengthen data strategies that support systems change.

CONSIDERATIONS FOR COMMUNITIES

What support and buy-in is necessary to access data and usable analyses?

What data capacities exist in the partnership? What additional data capacities does the partnership need?

Who should be at the table as the partnership analyzes and interprets the data? Who can bring alternative perspectives and solutions as the partnership seeks to identify data-based actions?

How will the partnership balance a culture of data that focuses on learning and inquiry, as well as accountability and monitoring?

CONSIDERATIONS FOR FUNDERS

How can funders structure communications and investments to emphasize the use of data for inquiry, learning, and internal accountability — versus external accountability to the funder?

What are the additional data capacities that sites need to support data use?

How can funders provide and/or identify appropriate data supports?

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