



# PROMISING PRACTICES | A COMPANION GUIDE FOR PRINCIPLES TO ADVANCE EQUITY THROUGH SHARED MEASUREMENT

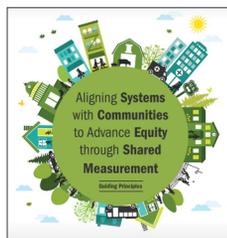
## Measurement that aligns systems with communities toward equitable outcomes...



### Why do these principles matter?

Systems within communities—including medical care, public health, housing, education, transportation, justice, and human services—directly influence the lives of community members. Systems must work together and with community members to align their actions with the priorities of the communities they serve, especially communities that historically have been harmed the most. One way to do this is with shared measurement. Shared measurement means developing and using a common set of measurable goals across systems that reflect a shared purpose and priorities. It involves defining what to measure and how; deciding where, when, and from whom to collect data; choosing specific metrics, data sources, and methods; and understanding what measurement means in the context of communities' own histories, narratives, and experiences.

Shared measurement can shift mindsets, policies, and practices to drive alignment toward equitable health and well-being. It can also rebalance power around priority setting, resource sharing, decision making, and accountability.



With funding from the Robert Wood Johnson Foundation and in collaboration with a wide range of experts with both lived and learned experiences, the American Institutes for Research developed five [Guiding Principles to Align Systems with](#)

### [Communities to Advance Equity through Shared Measurement.](#)

These principles lay out a core set of values to help systems and communities work together.

### How should I use this guide?

This guide helps systems and communities put the principles into action. It includes a set of reflection questions to encourage conversations between partners and promising practices that reflect lessons learned from talking to existing programs and communities. These practices overlap across multiple principles and represent only some of the steps that programs can take to apply the principles. Partners can use this guide to begin or deepen conversations with one another.

This guide is intended for partners in cross-systems programs. These partners include: (1) organizations such as government agencies, local anchor institutions such as hospitals or schools, or independent entities; (2) community members and community-based organizations (*community* can be co-defined by program partners); and (3) organizations that sponsor or pay for these kinds of programs.

This guide can help partners have open discussions about roles and how to promote equitable involvement of all who have a stake in the shared measurement effort. We will continue to update the guide as we learn lessons from the partners who use it. For more information about this work and additional materials, please visit [www.air.org/sharedmeasurement](http://www.air.org/sharedmeasurement).

# MEASUREMENT THAT ALIGNS SYSTEMS WITH COMMUNITIES TOWARD EQUITABLE OUTCOMES...

## Principle 1



Requires **upfront investment** in communities to develop and sustain community partner capacity

Is **co-created by communities** to center their values, needs, priorities, and actions

Creates **accountability to communities** for addressing root causes of inequities and repairing harm

Focuses on a **holistic and comprehensive view** of people and communities that highlights assets and historical context

Reflects **shared values** and intentional, long-term efforts to build and sustain **trust**

*“First and foremost, what I would really like to see improve is the level of inequities that we have based on race and ethnicity and the lack of opportunities for people of color in the community. . . . And with that improvement, I would like to see us building and creating more opportunities for people to become leaders.”*

—Community Resident, Denver, Colorado

## Reflection Questions

Partners discuss:

- Who is *the community* for our program?
- What investments could directly support community members' priorities and concerns? How can these investments influence community members' availability, interest, and ability to partner?
- What existing resources and skills within communities can support partnership around shared measurement? What additional knowledge or skills could benefit community members?
- How can we ensure that partners share a common understanding of *shared measurement* and *equity*?
- What investments in measurement and data systems are needed to support collecting and sharing data with community partners?
- How can we plan for investments to continue after the program ends? How can we use or shift resources from similar programs to build lasting change?

## Promising Practices

Programs invest time, money, and materials to:

- [Build relationships with community leaders](#). Sponsor and attend gatherings that are meaningful to community members. Use these opportunities to learn about the community and get to know community leaders.
- Develop [professional trainings for community](#) members on topics such as leadership development and using measurement for equity. Consider adding trainings to existing leadership programs in communities.
- Have [discussions with program staff about equity](#) in the context of the local community members' experiences and priorities.
- Hire staff or vendors [from within communities](#) for program activities and services (see *co-created* principle).



# MEASUREMENT THAT ALIGNS SYSTEMS WITH COMMUNITIES TOWARD EQUITABLE OUTCOMES...

## Principle 2



*“My voice is heard, that I’m able to sit at a table, and I am able to influence change and have my voice heard. And being able to ensure that change happens in a positive way for everybody else in the community.”*

*—Community Resident, Boston, Massachusetts*

### Reflection Questions

Partners discuss:

- What do community members say about their role in past measurement efforts? What do they say about the role they want to play in shaping the program’s measurement approach going forward?
- Who is left out of decisions about measurement?
- Are people who are most affected by measurement fairly represented on our decision-making boards or committees? Who holds the most seats on these boards or committees?
- Who owns the data used for measurement? Do the owners include communities that the data are about?
- What tools, such as data portals or dashboards, does the program use to ensure communities have access to their own data and are able to use the data?

### Promising Practices

Programs do the following:

- [Work with communities](#) to decide what roles their community members play at each stage of the measurement process.
- Create opportunities for community members to take on those roles. Prioritize helping community members who have been excluded in the past to take on leadership and collaboration roles.
- Make sure the teams that plan, analyze, report, and act on measurement [include individuals from communities most affected](#) by the program. Reserve multiple seats for community members on program boards or committees that oversee measurement.
- Make decisions about all aspects of measurement through two-way, [open communication](#) with community members, program staff, and other partners.



# MEASUREMENT THAT ALIGNS SYSTEMS WITH COMMUNITIES TOWARD EQUITABLE OUTCOMES...

## Principle 3



*“I think within our communities, we need to have clearly defined goals for our leaders. So that from period to period, we can hold them accountable, using those defined goals to be able to question them. And I think that’s the starting point that we need to look at.”*

– Community Resident, Boston, Massachusetts

### Reflection Questions

Partners discuss:

- How do the program’s goals help achieve community members’ priorities and address inequities?
- What opportunities will we create for community members to voice their concerns, ask questions, and get answers about the program’s progress?
- How will we use data and measures from the program to support recommendations to policymakers and advocate for communities?
- What structures, processes, and measures could help community partners or advisory boards hold decision makers accountable if the program doesn’t work or creates harm?

### Promising Practices

Programs do the following:

- Build a system of checks and balances that help partners [share power and responsibility](#).
- Use measures selected by community members to evaluate program success.
- Use measures to [encourage learning and program improvements](#), including feedback loops and continuous quality improvement.
- Include community members in an advisory board that monitors the program for unintended harm.
- Schedule regular updates through town-hall style public meetings, for example, to [clearly communicate program milestones](#) and findings to community members.



# MEASUREMENT THAT ALIGNS SYSTEMS WITH COMMUNITIES TOWARD EQUITABLE OUTCOMES...

## Principle 4



*You can't just help the children without helping the adults. Whether that be food, assistance with finding a job, or helping you with education. So, it's about health and the community. All of those pieces for people who are forgotten about.*

*– Community Resident, Jackson, Mississippi*

### Reflection Questions

Partners discuss:

- How will we collect stories (qualitative data) from community members in their preferred language to develop measurement that reflects how communities define themselves, their strengths, and expressed needs and goals? What time and resources will this require?
- What local community context or past experiences with data and measurement should we know and understand when planning the program?
- What will we do to learn about how the program impacts different groups of people?
- Across which systems would it be most helpful to compare data to gain a full picture of community needs, assets, and priorities (such as health, education, housing, others)? Who can provide these data?
- What are the barriers to merging data across systems? How can we overcome these barriers?

### Promising Practices

Programs do the following:

- [Use measures that reflect the range](#) of communities' needs and priorities, including food, housing, health, and public safety concerns (see *co-created* and *upfront investment* principles).
- [Break down data](#) by race, ethnicity, gender, age, language, zip code, and other factors during analysis to clearly show group differences in both assets and needs.
- [Merge data across multiple systems](#) to create a holistic view of people and communities.
- [Choose measures that multiple systems](#) find important and can use to foster collaboration between partners.



# MEASUREMENT THAT ALIGNS SYSTEMS WITH COMMUNITIES TOWARD EQUITABLE OUTCOMES...

## Principle 5

Requires **upfront investment** in communities to develop and sustain community partner capacity

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Creates **accountability to communities** for addressing root causes of inequities and repairing harm

Focuses on a **holistic and comprehensive view** of people and communities that highlights assets and historical context



Reflects **shared values** and intentional, long-term efforts to build and sustain **trust**

*“I feel like there should be a representative from each of these community groups to take the lead and be able to give us some feedback as a whole, as a community, about how they’re benefiting from these systems. Are the systems doing what they said they’d do?”*

– Community Resident, Asheville, North Carolina

### Reflection Questions

Partners discuss:

- What values are shared by community members and program partners? How do the program’s goals connect to these shared values?
- In what ways does the program’s measurement approach support these shared values and goals? What role do community members and other partners play in selecting measures that will guide work toward these goals?
- How easy is it for community members and other partners to find and understand information about what the program measures, why, and how? Is this information available in their preferred languages and formats, such as audio, video, or brief text, that are easy to understand?
- How can we make it easy for community members to speak up if the program’s measurement approach misrepresents them or their goals? How are we addressing concerns raised by community members?

### Promising Practices

Programs do the following:

- Work with community members and all other partners to [identify goals to work toward together](#). Start any conversation about measurement with a reminder of these shared goals.
- Build trust over time by [sharing out progress on measures that matter to community members](#). Show actions taken to continue progress and address any problems that come up along the way.
- [Work with community members](#) to design how the program will share information, listen, respond, and collaborate as it uses measurement.



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## Measurement that aligns systems with communities toward equitable outcomes...



### Brainstorming

What are we already doing with our partners to put these principles into practice?

How could we build on our existing efforts to advance equity using shared measurement?

How will we know that our efforts are working or still need to be improved?

Childers, T., Ali, M., Cowans, T., Dutta, T., & Schultz, E. (2021). *Promising Practices: A Companion Guide for Principles to Advance Equity through Shared Measurement*. (Prepared for the Robert Wood Johnson Foundation). Crystal City, VA: American Institutes for Research. Available at: <http://www.air.org/sharedmeasurement>