

Measuring Partnership Effectiveness

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What the Literature Tells Us

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With all the tasks and projects you have on your plate, why oh why would you even dream of trying to measure the effectiveness of your partnership/coalition and the progress you are making on the key issues that affect people in your community? After all, you have a pretty good sense of what's working and where the rough spots are, don't you? Besides, it takes time to see results and things are changing constantly right now. Surely it's better to wait until things settle down before expending time and energy on evaluation activities?



Sound familiar? As noted in the Spring 2008 *@ a glance* issue on Evaluation, for many of us “the world of evaluation seems mystical, confusing and daunting” and it is often difficult to “justify in our minds the value of spending valuable resources on activities other than direct programming” (Bodkin, 2008). However, most of us understand the importance of evaluation activities and just need some help navigating the volumes of information out there on the *how, what, where, when, why and who* elements of the process. That's where HC Link can help.

Finding out what's out there

As part of our ongoing efforts to support grassroots groups and partnerships working to create healthy communities, we have conducted a focused online scan of the literature as well as any existing HC Link resources to identify best practices for assessing partnership effectiveness and activities. This scan looked at key indicators, methods, tools and other resources published within the last 10-15 years that could assist groups needing to fulfill evaluation requirements for a variety of funders and groups simply looking to support the ongoing growth and development of their partnership and their projects.

This publication is the first in a series of resources that will outline the key findings of our scan so you can quickly access credible resources and make more informed decisions about how best to approach evaluation activities that measure the effectiveness of your partnership and the work you are doing. Our focus in this issue will be to provide an overview of some of the elements relevant for assessing partnership effectiveness and the principles that should guide decision-making early on in the process. We've also included a list of relevant resources and the key documents we reviewed in case you want to learn more.

So, what did we find?

We found there is no shortage of information on the topic of evaluation in general (guidelines to help you design and implement various types of evaluations) and a reasonable amount of information specifically on evaluating the functioning of partnerships and coalitions and the work they do.

The majority of the resources we looked at stressed the importance of *clearly defining the key questions to be answered by the evaluation* and tailoring the data collection methods and tools to the local context. Equally important was the idea that an evaluation should be timed to enable effective decision-making by those who are involved in or affected by the results of the evaluation (often referred to as key stakeholders). Evaluation components and timing should also consider the stage of development of the partnership. Several authors recommended using the information contained in existing **logic models** or other “theories of change” documents developed by local stakeholders to guide and inform the development of the evaluation plan.

What is a logic model?

A logic model is a planning tool that describes in chart form what your project intends to do and what it hopes to accomplish and impact. A logic model briefly:

- Summarizes key program elements;
- Explains the purpose behind program activities;
- Identifies intended outcomes.

Think of a logic model as a map that you develop to explain to others what your project intends to do and the impact you hope to achieve through the different activities you will be doing.

For more information on logic models visit www.thcu.ca/infoandresources and search for logic models. You can also use any internet search engine to find online information about logic models.

Types of evaluation

Our review discovered there are almost as many ways to describe evaluation models and frameworks as there are flavours of ice cream, often with overlapping definitions or ingredients! Consider the following list...

- Program evaluation
- Formative evaluation
- Summative evaluation
- Process evaluation
- Outcome evaluation
- Impact evaluation
- Interpretivist or constructionist evaluation
- Theory-based evaluation
- Collaborative or participatory evaluation and/or research
- Empowerment evaluation

It's no wonder we can get overwhelmed and confused. However, it is important to remember that we don't have to be experts in all these various types of evaluation. We do need to ensure we clearly define what we mean by the terms we use and ensure our stakeholders understand them too.

Levels of evaluation

One simple way of thinking about evaluation that may be of interest to community partnerships, their funders and local decision-makers is the three levels of partnership evaluation described by Butterfoss (2007) in her book *Coalitions and Partnerships in Community Health (pp440-441)*:

LEVEL 1: Measures of coalition infrastructure and functioning (Short-Term Outcomes)

These measures tell us how well the coalition is functioning and typically document changes in the number and type of partners, the perceptions or skills of staff and members, and the mission or direction of the coalition. In conjunction with community assessment data, these evaluations provide information that helps coalitions improve and adjust efforts over time, resulting in improved functioning and a greater likelihood of reaching desired goals.

LEVEL 2: Measures of coalition programs and interventions

(Short and Intermediate Outcomes)

These measures focus on the activities and programs that the coalition accomplishes; the people, organizations and groups it has served or impacted; and the scope of its various efforts. Measures typically assess changes in the program participants' knowledge, attitudes, beliefs and behaviours. The purpose of these evaluations is not only to prove that programs work but also to identify ways to improve them.

LEVEL 3: Measures of community change outcomes

(long-term outcomes)

These measures focus on long-term outcomes such as:

- changes in health status indicators (things like lower rates of diabetes and cancer, fewer injuries related to falls, decreased smoking rates among teens, etc),
- the stability and effectiveness of the partnership over time, and
- overall changes in the community's ability to work together to deal with emerging problems.

Thinking about evaluation in this way helps you to identify the main purpose of your evaluation and enables you to focus on the methods; indicators and tools that will help you gather the right information.

Butterfoss (2007) also recommends that “every coalition should aim to evaluate *something* at each level” on an annual basis and gives the following examples:

Level 1 – conduct a member survey to assess satisfaction with how the partnership functions

Level 2 – evaluate one program or activity or policy initiative that the partnership is involved with

Level 3 – collect/analyze current data on a set of health indicators of interest

In this way, evaluation activities remain manageable (it's difficult to evaluate everything all the time) and are easily integrated into annual planning cycles rather than ending up as one-off, last minute endeavors. Common to all three levels is the purpose of the evaluation activity – to identify what is working well and what elements need to be changed so that key stakeholders can make timely and informed decisions.

So WIIFM (what's in it for me)?

Making the time to evaluate the health of your partnership can help you and your stakeholders in four important ways (adapted from material in Butterfoss, 2007):

1. Ensures Accountability.

Community members, stakeholders and funding bodies can have confidence that the partnership is operating effectively and making a difference. You'll be able to answer critical questions like:

- *Are members satisfied with how the partnership functions and their role in the partnership?*
- *Do they/their organization benefit from the work of the partnership?*
- *Are partners contributing in meaningful ways?*
- *Is the partnership using its resources (more than just money) wisely?*

2. Assesses Performance.

The partnership can determine if its stated goals are being met and if changes need to be made to improve the functioning of the partnership. Helps you answer questions such as:

- *Did the partnership achieve its program/project goals and objectives?*
- *Were programs/interventions effective?*
- *Are there other approaches we can try?*
- *Are our clients/is our community better off as a result of our efforts?*
- *How can we ensure ongoing sustainability (of the issue, the program the behaviour change, the partnership)?*

3. Increases Visibility.

Measuring partnership effectiveness can increase the awareness and support of community members, decision-makers, funders and your community partners. It can also inform decisions regarding policy and advocacy work, answering questions such as:

- *Is the community aware of our partnership and the work we do?*
- *Does the community support our efforts/areas of focus?*
- *Did elected officials support our proposed advocacy/policy recommendations?*

4. Promotes Knowledge Exchange.

The process of undertaking evaluation activities and sharing the results increases the collective knowledge of the partners about existing strengths and informs strategies to help strengthen areas that are of concern to the partnership. It also contributes to a growing body of research on partnerships in general and adds to our collective knowledge about what seems to work, thus benefiting other community partnerships. Evaluation activities then can help to answer questions like:

- *Does a coalition approach work?*
- *What elements strengthen partnership functioning?*
- *What might we do differently next time?*
- *With whom and how can we share what we've learned?*

Patton (1997) as cited in Butterfoss (2007) discovered that “people often benefit more from skills learned through participating in an evaluation process than from the results of the evaluation” which underscores the potential for individual and organizational learning and development within your partnership.

Ten principles to guide partnership evaluation

1. The evaluation should be designed, implemented, and interpreted in partnership between the coalition and the evaluator.
2. The evaluation design should be informed by existing research, prior evaluations, and the wisdom of the people in the community.
3. The evaluation should be participatory and inclusive of all stakeholders.
4. The evaluation process should be used to assess, reflect, improve, and inform.
5. Expectations for the evaluation (including those related to goals, desired outcomes, processes, and roles) should be made explicit and clear for all stakeholders.
6. Issues of power and privilege, and of race and class, should be explicitly identified and addressed up front.
7. Trust and positive relationships among practitioners, community participants, funders, and evaluators should be constantly fostered and developed.
8. The evaluation process should be integrated into ongoing activities and functions.
9. Periodically, the evaluation process and design should be systematically re-evaluated to assure that it continues to meet the coalition's needs and to identify opportunities for using the findings to help decision-making and learning.
10. The findings of the evaluation should be shared frequently with stakeholders (including members of the community) in a format that is useful and meaningful to them.

(Butterfoss, 2007)

In summary

As Butterfoss (2007) so eloquently stated in her book:

Effective evaluation is an ongoing process that can help coalition decision makers to better understand their organization and their projects, and how they impact participants, partner agencies, and the community. Effective evaluation provides ongoing, systematic information to strengthen coalition programs during their implementation and outcome data to assess the extent of change among participants or within the community (p436).

And...

If a coalition is successful, evaluation must be performed that demonstrates a sustainable infrastructure and purpose, programs that accomplish their goals, and measurable community impacts (p493).

So, now you know why you need to make the time to make evaluation a priority for your partnership. And while the terminology used can sometimes make evaluation seem like rocket science, it doesn't need to be a complicated undertaking. There are lots of resources and evaluation experts out there that can help you navigate through each step of the process with confidence. Check out the resource list included here or contact the Healthy Communities Consortium for coaching and/or consultation support.

Resources Reviewed

Bodkin, A. (Spring 2008). Evaluation @ a glance, Heart Health Resource Centre.

An overview of evaluation, key terms, impacts and outcomes and resources.

http://www.hhrc.net/pubs/skills/@aglance_4.pdf

Butterfoss, F. D. (2007). *Chapter 14-Evaluating Coalitions and Partnerships*, in *Coalitions and Partnerships in Community Health*. San Francisco, CA: Jossey-Bass; John Wiley & Sons.

<http://www.josseybass.com/WileyCDA/WileyTitle/productCd-0787987859.html>

Butterfoss, F.D., Goodman, R. M., & Wandersman, A. (1993). Community coalitions for prevention and health promotion. *Health Education Research*, 8(3), 315-330.

http://www.mncanceralliance.org/uploads/Community_Coalitions_-_Butterfoss.pdf

Centers for Disease Control and Prevention. (2008). *Evaluation Guide: Fundamentals of Evaluating Partnerships*. Atlanta: US Department of Health and Social Services.

http://www.cdc.gov/DHDSP/programs/nhdsp_program/evaluation_guides/evaluating_partnerships.htm

Gardener, B. (February 2011). *Comprehensive Community Initiatives: Promising Directions for Wicked Practices*. Horizons Policy Research Institute.

www.horizons.gc.ca/doclib/2011_0061_Gardner_e.pdf

Harvard Family Research Project. (Spring 2007). *The Evaluation Exchange: A periodical on emerging strategies in evaluation*. Vol VIII No. I. Harvard Graduate School of Education.

<http://www.hfrp.org/evaluation/the-evaluation-exchange/issue-archive>

Pope, J. (August 2008). A Guide to Evaluating Your Partnership Using a Network Mapping Approach. Victoria-Department of Planning and Community Development. Suggested citation is: Lewis JM (2005) A network approach for researching partnerships in health. *Australia and New Zealand Health Policy*. 2:22 <http://www.dpcd.vic.gov.au/communitydevelopment/community-sector/partnerships/performance>

Porteous, N.L., Sheldrick, B.J. & Stewart, P.J. (1997). Program Evaluation Tool Kit – a blueprint for public health management. Public Health Research, Education and Development Program: Ottawa-Carlton Health Department. http://www.ottawa.ca/residents/funding/toolkit/index_en.html

Safer Scotland-Scottish Government. (February 2010). Safer Communities Programme. Principle 4: Better Outcomes for Communities. Evaluation: A guide to basic evaluation. <http://www.scotland.gov.uk/Resource/Doc/254429/0095035.pdf>

Also reviewed the resources listed in Appendices A & B in the February 2010 Healthy Communities Fund – Partnership Stream - Operational Guidelines (Ontario Ministry of Health Promotion & Sport).

Additional On-Line Resources

A guide to project evaluation: a participatory approach <http://www.phac-aspc.gc.ca/ph-sp/resources-ressources/guide/index-eng.php#contents>
Describes steps in evaluation, includes worksheets and an annotated bibliography of additional evaluation resources that may help you.

National Heart Disease and Stroke Prevention Program – Fundamentals of Evaluating Partnerships
Excellent overview of the evaluation process along with sample evaluation plans, tools and templates, possible evaluation questions and data sources. http://www.cdc.gov/DHDSP/programs/nhdsp_program/evaluation_guides/evaluating_partnerships.htm

The [Evaluation Step-by-Step Guide](#) provides guidance in developing an evaluation plan.

Towards Evidence-Informed Practice (TEIP) Tools.

www.teip.hhrc.net

TEIP features a set of three field-tested and rigorously evaluated Tools and processes for [Program Assessment](#) [PDF , [Program Evidence](#) [PDF , and [Program Evaluation](#) [PDF ].

Results Based Accountability (RBA).

A disciplined way of thinking and taking action that can be used to improve the quality of life in communities and improve the performance of programs, agencies and service systems.

<http://www.raguide.org/> a link to an online implementation guide for RBA.

United Way of America (1996). Measuring Program Outcomes: A Practical Approach.

“Demonstrates the use of logic models in clarifying and communicating outcomes. Cites experiences of many types of agencies. Includes worksheets, examples, and a bibliography on measurement issues and performance indicators.” (from the website). Available for \$5 at <http://national.unitedway.org/outcomes/resources/mpo/>. This site will also allow you to register for the electronic support network, “Outcome Measurement Resource Network.”