



# PARTNERSHIP EVALUATION GUIDE:

## Building Productive Relationships Through Evaluation

September 2021



**Public Health**  
Prevent. Promote. Protect.

**NACCHO**  
National Association of County & City Health Officials

# TABLE OF CONTENTS

Purpose of this Guide.....	2
Overview of Partnership Evaluation.....	3
Purpose of Partnership Evaluation .....	3
Choosing the Partnerships to Evaluate.....	3
CDC Six-Step Evaluation Process.....	4
Overview of the Six Steps .....	4
Overview of the Standards.....	5
Questions to Consider Before Getting Started.....	5
Step 1. Engaging Stakeholders .....	5
Step 2. Describe the Partnership .....	7
Step 3. Develop an Evaluation Plan.....	10
Step 4. Gather Evidence.....	13
Step 5. Justify Conclusions .....	16
Step 6. Share Lessons Learned .....	19
Final Evaluation Tips.....	20
Appendix A: Partnership Evaluation Checklist.....	21
Appendix B: Logic Model Template.....	22
Appendix C: Evaluation Plan Template .....	23
Appendix D: Brief Ready-to-Go Partnership Effectiveness Evaluation .....	25
Appendix E: Partnership Evaluation Resource List .....	27
Appendix F: Evaluation Resource List.....	30
Appendix G: Formal Evaluation Report Template .....	31
Appendix H: Works Cited.....	33
Appendix I: Glossary.....	34

## REPORT AUTHORS

## ACKNOWLEDGEMENTS

## PURPOSE OF THIS GUIDE

This guide aims to provide local health departments with tools for evaluating their partnerships. This builds upon a webinar available in NACCHO's technical assistance package entitled **Partnership Evaluation**, which can be found on [NACCHO University](#).

This Partnership Evaluation Guide begins by emphasizing evaluation as a pillar of productive partnerships. The second section focuses on the [Centers for Disease Control's Six Step Evaluation Process](#).<sup>1</sup> This guide will take you through each step of the framework with partnership evaluation as the subject. Additionally, each of the six steps concludes with helpful reminders to consider when putting the step into practice. By the end of this guide, you should have everything you need to effectively evaluate your partnerships! The guide concludes with appendices including an evaluation checklist, logic model template, evaluation plan template, ready-to-use partnership effectiveness tool, and resources for both partnership evaluation and general evaluations.



<sup>1</sup> Framework for Program Evaluation – CDC. (2017, December 14). Retrieved April 11, 2018, from <http://www.cdc.gov/eval/framework/index.htm>

# OVERVIEW OF PARTNERSHIP EVALUATION

## Purpose of Partnership Evaluation

Partnerships often determine the success of programs. They are varied depending on your needs and available resources to support the partnership. For this guide, the term partnership is loosely defined as “a collaborative effort between your health department and a community organization(s).” We are not necessarily concerned with the degree of formality of the partnership. After partnerships are established, local health departments must sustain and grow them. Partnerships will change over time as the needs of a program change; this includes the number of partners, the responsibilities and roles, and effectiveness of the relationships. Partnership evaluation can focus on monitoring the progress of the evaluation, increasing awareness of the partnership, and reaching the objectives of the partnership.

Monitor Progress	<ul style="list-style-type: none"><li>• Assess functioning and productivity</li><li>• Improve and guide initiatives</li></ul>
Increase Awareness	<ul style="list-style-type: none"><li>• Leverage resources and support</li><li>• Build capacity and accountability</li></ul>
Reach Objectives	<ul style="list-style-type: none"><li>• Sustain partnerships</li><li>• Key to accomplishment of programs</li></ul>

The benefits of partnership evaluation can vary but include:

- partnership capacity building (i.e., developing skills and ability so your partnership can thrive),
- development of a process to achieve the partnerships outcomes,
- improved relationships with partners,
- accountability built within the partnership, and
- increased support for the partnership within the community.

Additionally, evaluation of partnerships can reveal information about a program that may not be evident without the data collection and analysis done through the evaluation.

## Choosing the Partnerships to Evaluate

The first consideration you will make when conducting a partnership evaluate is to choose which partner(s) to evaluate. This can be very challenging and depends on the partner and their relationship to your local health department. Each partnership is unique. Evaluation activities must be appropriate for the

level, scale, scope, and purpose of the partnership. Not all evaluation methods or elements will apply to all types of partnerships. The evaluation must focus on partnerships where data will be the most useful to your program. Several factors to consider when determining the level and scope of partnerships to evaluate include:

- maturity of the partnership,
- purpose or objective of the evaluation,
- evaluation questions of interest to stakeholders,
- the intended use of the evaluation, and
- the available resources for evaluation.

Like all evaluations, the planning of the partnership evaluation should be considered from the beginning of the partnership (or project). Evaluation activities can be conducted throughout the partnership and can consist of a range of activities from informal interviews to attendance recorded at meetings. As a partnership develops, increasingly in-depth assessments may be appropriate.

## CDC SIX-STEP EVALUATION PROCESS

The CDC Six Step Evaluation Process<sup>2</sup> is not the only evaluation framework, but it is the one most frequently employed by NACCHO. Each step will be elaborated on in the subsequent pages. The CDC Evaluation Process is easily applied to a variety of subject matter from programs to our purpose of partnership evaluation. In the following pages, we will apply this CDC framework to partnerships.

### Overview of the Six Steps

In the first step, *engaging stakeholders*, you bring the stakeholders together to discuss the evaluation. Ideally, this increases the credibility for the partnership. During the second step, *describe the partnership*, is when the evaluator sets goals, objectives, and outcomes, as well as develops the logic model. The third step, *evaluation design*, is when you



<sup>2</sup> Framework for Program Evaluation - CDC. (2017, December 14). Retrieved April 11, 2018, from <https://www.cdc.gov/eval/framework/index.htm>

would develop the evaluation plan based on the logic model and appropriate evaluation methods. The fourth step, *gather evidence*, is when evaluation data is collected. Step five is *justify conclusion*, when you will analyze data and write the report or dissemination materials. In the sixth step, you will *ensure use and share lessons learned* by disseminating the evaluation findings.

## Overview of the Standards

In addition to the six steps, there are also four standards which should be incorporated into each step of the evaluation process. The CDC has 30 standards, but they are classified into four categories: utility, feasibility, propriety, and accuracy. The utility standards ensure the evaluation meet the information needs of the intended users. Feasibility standards ensure a realistic evaluation. Propriety standards ensure the evaluation is ethical for those involved in the process. Accuracy standards ensure the evaluation conveys adequate information about the merits of the partnership.

## Questions to Consider Before Getting Started

- What do you want to learn and what do you need to know?
- What will be helpful and what will others learn from your findings?
- What data do you need for decision making or planning?
- What data will be useful to understand outcomes?
- What data do you need to understand how effective your partnership is?
- What is your capacity to conduct the evaluation?

**For example, a health department might want to evaluate their partnership with a local hospital, so they know whether to continue their partnership. They want to know the effectiveness of the partnership and what made it effective. The health department has meeting minutes and a community health improvement plan. They also only have one person they can dedicate to the evaluation.**

## STEP 1. ENGAGING STAKEHOLDERS

The first step when planning a partnership evaluation is to identify the stakeholders who have a vested interest in the evaluation findings, as well as those who have direct or indirect interest in the partnership's and program's success. To ensure the information collected, analyzed, and reported meets the needs of the stakeholders, you must work with evaluation users to consider the questions they would like answered and how they might use the findings. The stakeholders should include people who will use the evaluation results, support or maintain partnerships, and are affected by the partnerships' success.

### Partnership strategies include:

- Networking only: exchange of information
- Coordinating: exchanging information and altering activities for mutual benefit and a common purpose
- Cooperating: exchange of information, altering activities, and sharing resources for mutual benefit and a common purpose
- Collaborating: exchanging information, altering activities, sharing resources, and enhancing the capacity of another for mutual benefit and a common purpose

This phase can help you determine the fundamental evaluation questions, pretest data collection instruments, ensure evaluation results are used, and provide actual data and assist with data collection by adding resources. A single evaluation cannot address all possible aspects of a partnership. The focus will have to be narrowed to be feasible. Typically, a manageable group of stakeholders is between 8 and 10 people. The stakeholders will serve in an advisory role through the evaluation. When selecting stakeholders, it is essential to consider the kind of partnership being evaluated and the partnership strategies.

Early in the planning process, the evaluation's purpose and its ideal users should be clearly defined. These two aspects of the evaluation are the foundation for the planning, designing, and interpretation of any findings. The purpose of the evaluation should influence who is selected to participate as a stakeholder.

### Potential Partnership Evaluation Purposes:

- Monitor the productivity of a partnership
- Improve and guide the partnership activities
- Determine if the goals and objectives have been met
- Promote the public image of the partnership
- Build capacity for evaluation within the partnership
- Provide accountability to funders

### Who might be stakeholders?

- Funders
- Partnership members
- Lead staff
- Program staff

- Communities relevant to program and partnership activities
- Key individuals who can add credibility to the evaluation through their roles in the community or organizations
- Individuals or organizations that might challenge your ability to conduct your evaluation
- Potential partners

Because evaluations can be resource intensive, buy-in for the evaluation plan by the stakeholders is imperative. Buy-in requires that stakeholders understand the mutual uses and benefits of the evaluation.



### Step 1 Reminders

- Decide on the purpose and use for the evaluation
- Users and use will relate directly to the purpose and context of your evaluation
- Stakeholders should be the most relevant to the purpose and use of the evaluation
- Develop evaluation questions of interest to stakeholders
- Consider the maturity of the partnership

## STEP 2. DESCRIBE THE PARTNERSHIP

It is important to begin step 2 by defining the partnership. This definition should include the purpose, resources, activities, desired outcomes, stage, and any cultural context. Although you can use a framework, diagram, or narrative to describe the partnership, this guide will focus on logic models.

Before beginning the logic model, consider defining the stage of your partnership. After all, an evaluation of a partnership that has been established for more than a decade will look very different compared to an evaluation of a partnership that was formed six months ago. Partnerships come in a variety of shapes and sizes, but many partnerships fall into one of three stages.

## Three Stages of Partnerships

- Formation
- Building
- Maintenance

In the *formation* stage of partnership development, needs assessments might help determine the need for and feasibility of the partnership. This stage is when the partnerships are defined, and strategy is laid out. The *building* stage is when the partnership develops infrastructure and capacity. In the *maintenance* stage, the partnership is mature; the partnership activities are focused on achieving the program outcomes. It is important to note that these stages are not static, a partnership can move through them and between them depending on the situation.

**For example, your partnership might be formalized with a mission and written agreement, and reassess the relationship and modify the partnership, which would be in the maintenance phase. Or a partnership might have been established for one specific purpose, and now needs to adapt, where it might be in the formation or the building phase depending on the adaption required.**

Stage	What You Can Evaluate at This Stage
Formation	Need assessment
Building	Process Evaluations such as is the partnership performing as expected
Maintaining	Outcomes and impacts

After determining the stage in which the partnership currently is, you should develop think about the overall partnership. Begin by describing your partnership, what is the purpose, the goals, is it linked directly to a specific program or does the partnership transcend the programmatic work you do in collaboration? At this point, developing a logic model to plan your evaluation can be very useful. Let's begin by defining the aspects of the logic model. *Inputs* are the resources you are putting into the partnership; these develop and maintain the partnership. *Activities* are the events that are part of the partnership. *Outputs* are the deliverables from your partnership. Depending on the nature of the partnership, these outputs might be directly related to a project. Finally, the *outcomes* are the changes, impacts, and results from the partnership's activities and outputs. Outcomes can be focused on short-term, intermediate, and long-term change.

For example, if your health department is working with a local sports association to conduct a marathon, then one output might be the race. However, if your partnership is focusing on long term structural change, such as addressing social determinants of health, then outputs might be a meeting, or the number of phone calls made about an issue.

This skeleton for your partnership evaluation should follow the format below.



## Steps in Developing a Logic Model

To develop your partnership’s logic model, start by listing out the inputs, activities, and outputs. These are likely at the forefront of your mind already. Question to consider when listing inputs include: What do you and your partner bring to the partnership? What needs to be developed for the partnership to be established? Then, think about the activities you are planning to conduct throughout the course of the partnership and the outputs, or deliverables, of those activities.

For example, you may bring staff time and funding as resource inputs. Your activities may include meetings with your partners, and during those meetings, you will develop a community action plan.



### Step 2 Reminders

- Start with a simple logic model, and develop it as you need
- Select your inputs, activities, outputs, and outcomes
- Decide what is appropriate for your evaluation
- Identify the stage of the partnerships you are going to evaluate
- Considering the context of the partnership to shape your logic model and evaluation

## STEP 3. DEVELOP AN EVALUATION PLAN

During this step, you must determine the scope, purposes, and available resources for your partnership evaluation. The evaluation should be based on the logic model and focused on the most important evaluation questions developed by your stakeholder group. Remember, you will not be able to answer all the evaluation questions. But this is where you will determine which are the most feasible based on your resources. The table below shows some examples of purpose, uses, and evaluation questions.

### Partnership Evaluation Purposes, Uses, and Sample Questions Examples

Purpose	Uses	Evaluation Questions
Partnership Monitoring	Assess partnership engagement (e.g. attendance at meetings, at activities, etc.)	What is meeting participation? What activities are occurring? What partners attend these activities?
Partnership Improvement	Assess if a partnership is effective and successful	Are partnership meetings productive and effective?

It is important to select which aspects of a partnership should be included in your partnership evaluation. Remember, you do not have to evaluate every aspect of a partnership or an aspect across several partnership. In addition, if you have a very specific purpose, then that will guide the selection of partnership for your evaluation. For example, if you're want to understand how a program is working with a specific population, then partners that represent that population would be ideal for the evaluation. At this point, it can be useful to brainstorm potential aspects of your partnership that can be assessed through an evaluation, as well as questions to explore. Dust off your logic model, because it will be helpful when developing evaluation questions.

The long-term outcomes can be complicated and difficult to link directly to the partnership activities you're trying to evaluate. You might want to focus instead on the short-term and intermediate outcomes. Linking these short-term and intermediate outcomes to the long-term outcomes enables you to document your progress toward the long-term outcomes. Additionally, to ensure you are considering all potential evaluation questions, you should encourage your stakeholders to share their interests, concerns, and perspectives.

Now that you've developed the potential evaluation questions, you'll want to prioritize the questions.

## Things to Consider when Prioritizing Evaluation Questions

- Which questions are the most important to your agency?
- Which questions are the most important to your stakeholders?
- Which questions yield results that can be used by you and your stakeholders?
- Can you access or gather data to answer the question?
- Do you have the resources to answer the question?

**Stakeholders should assist in narrowing your questions, and the information they need should be a priority.**

In addition to the needs of your stakeholders, you should consider which values or criteria of the partnership you will use to judge the performance of the partnership. For example, the specific objectives of your partnership should be incorporated into the development of your evaluation plan.

**Your evaluation can not answer all of your potential questions; it is important to keep your expectations realistic.**

## Possible Partnership Values and Criteria

- Needs of members
- Community values
- Program procedures
- Similar programs' performance
- Comparison to control group (if it exists)
- Resources
- Mandates and laws
- Social equity
- Institutional goals
- Perspectives of partners, funders, and experts

## Select Your Evaluation!

The table below highlights some of the most common types of evaluation. No one size evaluation will fit all, so make sure you select the evaluation that can best help you answer your evaluation question(s). Your partnership evaluation should reflect the stage of the partnership, the purpose of the evaluation, potential users, evaluation questions, and the partnership values.

Type	Role	When Appropriate	What it Demonstrates	Use
Formative	Measures a partnership's feasibility, appropriateness, and acceptability before implementation	<ul style="list-style-type: none"> <li>• Development of new partnership</li> <li>• Modification of existing partnership</li> </ul>	<ul style="list-style-type: none"> <li>• Whether evaluation is possible</li> <li>• Whether partnership elements are</li> </ul>	Allows modifications to the program before full implementation; increases likelihood of program success
Process/Implementation	Determines if activities have been implemented as intended	<ul style="list-style-type: none"> <li>• When the partnership implementation begins</li> <li>• During current partnership</li> </ul>	<ul style="list-style-type: none"> <li>• How well a partnership works</li> <li>• Is the partnership being implemented as expected</li> <li>• Is the program accessible to the target population</li> </ul>	Provides early warnings about any problems; allows program to monitor how their program plans and activities are working
Outcome/effectiveness	Measures a partnership's effects on target populations	<ul style="list-style-type: none"> <li>• After contact between partnership and intended target population</li> </ul>	<ul style="list-style-type: none"> <li>• Is the partnership having an effect on the target population's behaviors</li> </ul>	Indicates whether the program is effective in meetings it's objectives
Impact	Measures a partnership's effectiveness	<ul style="list-style-type: none"> <li>• During current partnership</li> <li>• End of partnership</li> </ul>	<ul style="list-style-type: none"> <li>• Has the partnership met its goal</li> </ul>	Provides evidence for policy and funding decisions



### Step 3 Reminders

- You can't and shouldn't try to evaluate every aspect of your partnerships to complete your partnership evaluation
- Use the logic model as your guide
- Consider the stage of the partnership, the purpose of the evaluation, users, and design that matches questions and resources when focusing your evaluation
- Consider what you really want to know, which questions can you answer with your resources, and design appropriate questions, resources, and purpose for your evaluation

**Stakeholders might disagree about the amount of progress toward an outcome. It is important to document your “baseline” or threshold for the performance indicators.**

## STEP 4. GATHER EVIDENCE

To accomplish this step of the evaluation, you must continue to consider the purpose, maturity stage of the partnership and evaluation questions, and what the evaluation can and cannot accomplish. Primarily, this step focuses on thinking about what is credible evidence for your stakeholders. You should determine the focus of the evaluation (inputs, activities, outputs, or outcomes) and select indicators suitable for measuring that focus. In addition, you will need to identify sources of evidence and the appropriate methods for obtaining data. Finally, you will need to develop and implement the data collection methods for your selected indicators.

First, consider what data is available and what new information you will have to gather. There is a wide range of possible indicators, data sources, and data collection methods. Talk to others to determine strategies useful for your partnership evaluation. *Indicators* are measurable information used to determine if a partnership is meeting its goals. They help us understand the

changes within a partnership, but they may incite more questions about why a change occurred. Indicators should influence the evaluation process from evaluation plan, methods, analysis, and reporting.

Indicators can be quantitative or qualitative. The most common types of indicators are input, process, and outcome. Input indicators measure the contributions necessary for the partnership. When thinking about indicators, think about the time, effort, and cost you're going to have to invest to measure these indicators. For example, if you were evaluating the feasibility of a partnership, an input indicator could measure whether you (and your partner) have the staff to dedicate to regular meetings, and a process indicator could measure how often you meet and who is in attendance.

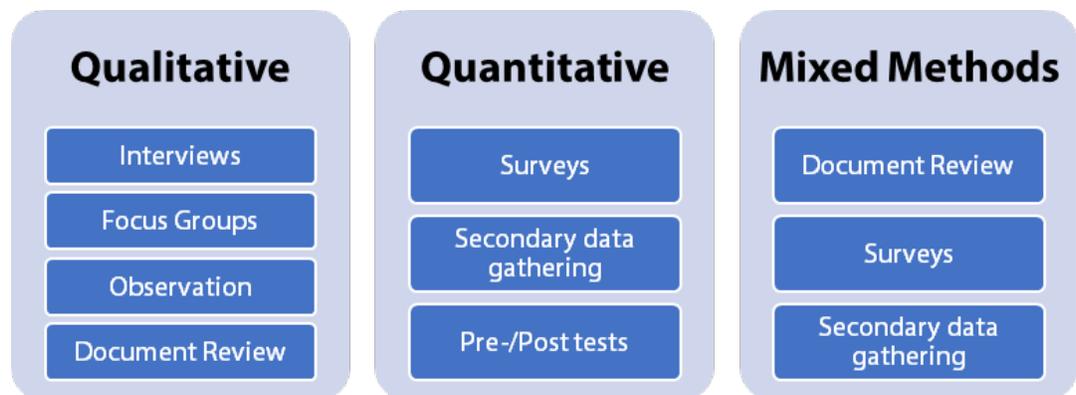
Indicator Type	Definition	Example
Input	Measures the contributions necessary for the partnership	Funding Staffing Infrastructure
Process	Measures activities and outputs	Needs assessment Participation
Outcome	Measures change/effects in short, intermediate, and long term	Overall aim of the partnership

Indicators should be achievable but also challenging. Remember to consider the stage of the partnership, the logic model, and funders' and stakeholders' expectations. Define the indicators and the baselines for these indicators early. Trying to make these distinctions later in the process can result in unintended challenges, such as misinterpretation of the data being collected. While determining the data collection methods, consider the most efficient method for gathering the new information, as well as the scope and cost of the data collection method and how it addresses the questions and purpose of the evaluation. Data collection methods include qualitative, quantitative, and mixed-method approaches. *Qualitative data* is used for general insights and including the human perspectives; it is usually collected through observation, interviews, and focus groups. *Quantitative data* is used for hypothesis developing and testing; this data is frequently collected through surveys or adminis-

**For example, a coalition who's been working together for several years want to demonstrate the impact of its work to secure future funding. Their focus has been on obesity and have had multiple programs and initiatives over the years. They may look at if their programs have decreased obesity and select regional obesity rates to compare to their baseline.**

trative data. Document review is usually qualitative but can be a mixed method. Likewise, surveys and secondary data gathering are usually quantitative but can be mixed. A combination of methods can provide a complete picture of how the partnership functions. The figure below shows the different kinds of methods.

No data collection method is superior to another, but they have different use cases. For example, an impact evaluation might require a comprehensive survey and secondary data gathering. In contrast, a brief feasibility evaluation—focusing on whether to partner with the same organization again—may be best served with an interview or a brief survey (such as the one found in [Appendix D](#)) focusing on satisfaction. It is also important to note that, depending on the method you select, the level of effort and rigor varies.



#### Step 4 Reminders

- To gather credible evidence requires thought at the onset of the evaluation
- Establish indicators to measure change
- Before selecting methods, determine what data already exists and is available to you
- Methods for data collection will reflect the evaluation questions and design
- Consider what instruments already exist
- Consider how burdensome data collection will be



## STEP 5. JUSTIFY CONCLUSIONS

This step includes analysis of the information collected, interpretation of the data, and drawing conclusions. First, you want to make sure you have “good” data—that is making sure the data is free of errors, identifying outliers, and missing data.

Data analysis can include the following steps: consolidate your data, analyze your data, present your findings, interpret your results. Consolidating your data might be as simple as downloading the data set or transcribing your recorded interviews, but it is important to have your data accessible and easy to use for you to ensure you can interpret and refer back to it. It could also be more a complex system; it will depend on the scope of your evaluation. Likewise, data analysis could be quite simple, like downloading a report from your data collection software, to more challenging, like developing an interview coding scheme. Data analysis will be reflective of the kind of data you collected, and the level of rigor required by your evaluation. For example, interview data needs to be coded, but you might need to run descriptive statistics on survey data.

Once data is analyzed, this is another opportunity to engage your stakeholder group. Review the results with them to ensure the findings make sense. Involving others in the discussion of your findings increases the validity of your findings, as well as their use. It is essential to be transparent in your evaluation. You should consider involving your stakeholders in a participatory way instead

of providing them with a final report. Instead, you can present first drafts of the data and/or the findings to the stakeholders giving them a chance to provide feedback. This enables you to keep the stakeholders interest and engage them in the evaluation process. It will also help identify which findings and recommendations are the most meaningful to stakeholders. Finally, it will increase the likelihood that the findings and recommendations will be used.

### Know your audience:

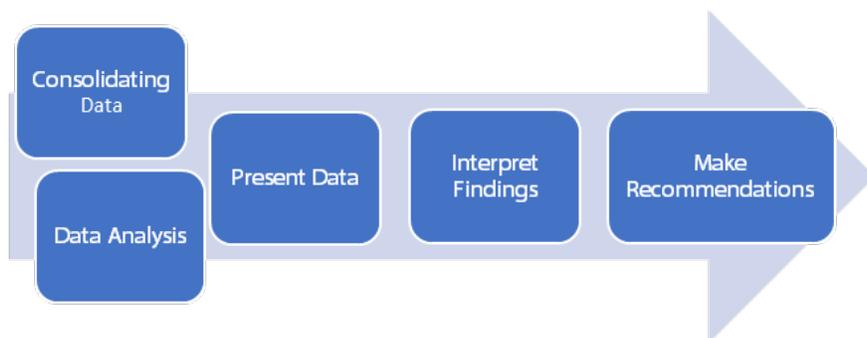
- Who are you speaking to?
- How do they view the world and their place in it?
- What is at play for the audience?
- Create a game plan

During this stage, you will want to determine what your audience needs to know from the findings and the best way to present the data to them. It is important to “know your audience” so you can communicate your findings in the way to maximize impact. Sometimes it is useful to develop a data user profile to consider all the things you should keep in mind when trying to know your audience.

### Useful tips in this step include:

- Remember to interpret evaluation results with the goals of the partnership in mind
- Keep your audience in mind
- What are the limitations (biases, validity, reliability) of your data collection and analysis methods?
- What other explanations exist for your results?
- How do your results compare to those from similar partnerships?
- How have the different data collection methods shown similar or different results?
- Are your results what you expected?

The analysis process should resemble the diagram below.





### Step 5 Reminders

- Make sure your analysis is appropriate for the data you collected
- Support your conclusions with evidence
- Determine your audience and present the data in an effective way
- Develop recommendations



## STEP 6. SHARE LESSONS LEARNED

The final stage includes developing a communications plan to broadly share findings and lessons learned. The intended use of the evaluation results should

uld have been determined at the beginning of the evaluation process and considered during each step. Using the results from your evaluation can have numerous impacts on your partnership and program. For example, you can justify expanding resources or correct identified weaknesses. To increase the probability of your evaluation findings being used:



### Step 6 Reminders

- Tailor the report to your audience
- Summarize the evaluation plan and procedures
- Present the results in a clear and concise way
- Summarize the roles of the stakeholders
- Explain the focus of the evaluation and the limitations
- Verify the report is unbiased and accurate
- Use examples, illustrations, graphics, etc.
- Be timely
- Distribute the report to all stakeholders
- Share the information regularly with partnership leaderships and coordinators during the evaluation
- Incorporate findings into an action plan
- Keep stakeholders involved so they can help disseminate the findings
- Tailor the information and sharing methods to reflect your audience
- Share information promptly
- Present data clearly and concisely

Evaluation findings can be shared in many ways including a written report, presentation, or event. Regardless of the specific delivery method, evaluation dissemination should include the evaluation purpose and questions, methods, findings, and recommendations. For a more formalized evaluation

report, see [Appendix G](#). When presenting to specific audiences, consider the style, tone, messaging, and format.

## Final Evaluation Tips

The following steps will help increase the use of your findings from your partnership evaluation.



### Reminders

- Develop an evaluation team
- Involve stakeholders
- Identify the purpose, uses, and the use of the evaluation
- Construct a partnership logic model
- Identify the main evaluation questions
- Select the appropriate tools and instruments for data collection
- Analyze the results
- Translate findings into the appropriate format
- Determine who is responsible for the sharing and ensuring the use of findings

# APPENDIX A: PARTNERSHIP EVALUATION CHECKLIST

- **Determine your stakeholders**
  - Determine the purpose of the evaluation
  - Develop evaluation questions
- **Describe the partnership**
  - Develop a logic model
  - Develop an evaluation plan
  - Consider the maturity of the partnership
  - Consider the components of the partnership to focus the evaluation: infrastructure, internal structure, and process
  - Communicate with stakeholders to guide and focus the evaluation
- **Focus the evaluation**
  - Prioritize your evaluation questions
    - What do you need to know?
    - What is important to you and your stakeholders?
    - What can you answer?
  - Select an evaluation design
- **Gather evidence**
  - Consider early in the process
    - What data do you already have?
    - What data do you need to collect?
  - Select method
  - Establish indicators
  - Select data collection tools
    - What primary data?
    - What secondary data?
    - What is the burden of the data collection?
- **Justify conclusions/Data analysis**
  - Is the analysis appropriate for everyone?
  - Does your evidence support your conclusions?
  - What are the limitations to your evaluation?
  - What other explanations exist for your findings?
  - Develop recommendations
- **Share lessons learned**
  - Create dissemination materials
  - Summarize your evaluation plan and evaluation focus
  - Verify report/dissemination materials are unbiased
  - Distribute findings

# APPENDIX B: LOGIC MODEL TEMPLATE

<b>Inputs</b>	<b>Activities</b>	<b>Outputs</b>	<b>Short-Term Outcomes</b>	<b>Intermediate &amp; Long-Term Outcomes</b>
<ul style="list-style-type: none"><li>• What resources you're putting into the project</li></ul>	<ul style="list-style-type: none"><li>• What you're doing in the project</li></ul>	<ul style="list-style-type: none"><li>• What are your deliverables</li></ul>	<ul style="list-style-type: none"><li>• Short-term Impact</li></ul>	<ul style="list-style-type: none"><li>• Long-term Impact</li></ul>

## APPENDIX C: EVALUATION PLAN TEMPLATE

**Evaluation Purpose:** [insert the purpose of the evaluation]

The evaluation will consist of [insert # of] components:

- 1) [insert component, for example survey]
- 2) [insert component, for example secondary data analysis]

### Evaluation Questions/potential indicators:

Evaluation Question	Indicator	Source
[insert evaluation question]	[insert indicator]	[insert source]
[for example, how engaged are partners?]	[for example, meeting attendance]	[for example, meeting notes]
	[for example, clearly defined and identified partner roles]	[for example, administrative data/survey data]

### Checklist

[insert data collection component, for example survey]

- Update meeting instruments for the session and overall meeting evaluations
- Review instruments with team
- Design post webinar instruments (consistent with the webinar evaluations)
- Design instrument for outcome-based evaluation
- Finalize instruments
- Program instruments

[insert data collection component, for example survey administration]

- Launch survey day after in-person meeting
- Field for 2 weeks
- Schedule two survey reminders
- Manage survey in the field

**All of these checkboxes should reflect the activities and steps in your evaluation. Interview and survey data collection methods require different steps. Keeping a detailed checklist can help you manage the step.**

### Report analysis

- Clean and analyze data

### Product development

- Create codebook
- Write code to analyze findings
- Write methods/technical documentation
- Transfer to Stata and clean findings
- Analyze findings
- Create figures/presentation of findings
- Incorporate staff feedback from debrief to give open ended comments more context

Task	Date to be Completed	Responsible
[insert tasks reflective of your evaluation]	[insert date]	[identify responsible person or organization]
Draft instruments/ define where data is being gathered		
Finalize instruments		
Data collection/ administration		
Gather and analyze data		
Justify conclusions		
Share lessons learned		

## APPENDIX D: BRIEF READY-TO-GO PARTNERSHIP EFFECTIVENESS EVALUATION

Please indicate level your of agreement by marking the appropriate column.

[Scoring]

	Strongly Disagree [1]	Disagree [2]	Neutral [3]	Agree [4]	Strongly Agree [5]	Not Applicable [0]
The vision for the partnership was clear.						
A planning process was used to develop the partnerships' goals and objectives.						
Partners followed through on the agreed upon activities.						
All partners clearly understood their roles.						
Communication between partners was clear and complete.						
The partnerships' efforts are sustainable.						
The partnership will contribute to [insert outcome] in your community.						
You are satisfied with your organization's role in the partnership.						
Partners worked well to accomplish goals.						

This instrument includes the scoring for ease of use. Simply enter the information into a data collection software (Qualtrics, Survey Monkey, Microsoft forms, Google forms), and if the software allows program the numeric score. Then when you pull the data from the data collection software, the scores will be there and ready to analyze.

Alternatively, you can use a hard copy of this instrument and enter the data into a spreadsheet software. Either way, the numeric scoring will allow for ease during analysis, where you can just tabulate the have level of agreement for each statement or compute those who agree by computing a statistic for anyone who indicated “agree” or “strongly agree.” You can access an excel tutorial on Youtube that meets your specific needs. The [“countif”](#) and [“countifs”](#) might be useful.

## APPENDIX E: PARTNERSHIP EVALUATION RESOURCE LIST

Tool	Access	Use	When Appropriate
Assessing Your Collaboration: A Self Evaluation Tool	<a href="https://joe.org/joe/1999april/tt1.php">https://joe.org/joe/1999april/tt1.php</a>	Open access. Article may be reproduced for education and training activities. Contact: <i>Journal Editorial Office, joe-ed@joe.org.</i>	This is a self-evaluation tool use to examine the factors that influence the collaborative process.
The Center for the Advancement of Collaborative Strategies in Health at the New York Academy of Medicine developed a partnership self-assessment tool	<a href="http://www.nccmt.ca/knowledge-repositories/search/10">http://www.nccmt.ca/knowledge-repositories/search/10</a>	No conditions for use Contact: Center for the Advancement of Collaborative Strategies in Health Division of Public Health, New York Academy of Medicine 1216 Fifth Avenue, Room 452 New York, USA 10029-5293 Phone: (212) 822-7250 Fax: (212) 426-6796	The tool evaluates internal partnerships and contains 11 themes sections. It aims to access the strengths and weaknesses of a partnership.
Centers for Disease Control and Prevention: Partnership Evaluation Guidebook and Resources	<a href="https://www.cdc.gov/obesity/downloads/partnershipevaluation.pdf">https://www.cdc.gov/obesity/downloads/partnershipevaluation.pdf</a>	No conditions for use. Contact: For further information, contact the Division of Nutrition, Physical Activity and Obesity (DNPAO), Program Development and Evaluation Branch at <a href="mailto:cdcinfo@cdc.gov">cdcinfo@cdc.gov</a> .	Step by step guide for partnership evaluations within their specific program. Easily adaptable.

Coalition Works	<a href="http://coalitionwork.com/resources/tools/">http://coalitionwork.com/resources/tools/</a>	They will develop tools for you or encourage you to adapt already existing tools. Contact: 1109 Moore House Road Yorktown, VA, 23690 Phone: 757-898-7454	This organization works on coalition development and evaluation. They have several tools for different kinds of coalition assessments.
The Division of Heart Disease and Stroke Prevention published a partnership satisfaction survey in "Evaluation Concepts"	<a href="http://www.p12.nysed.gov/turnaround/documents/partnership_guide.pdf">http://www.p12.nysed.gov/turnaround/documents/partnership_guide.pdf</a>	No conditions for use. Contact: The Division for Heart Disease and Stroke Prevention, Applied Research and Evaluation Branch at cdcinfo@cdc.gov or (770) 488-2560.	Step by step guide for putting together a partnership evaluation. The instrument is qualitative.
Evaluating Collaboratives: Researching the Potential	<a href="http://learningstore.uwex.edu/assets/pdfs/G3658-8.PDF">http://learningstore.uwex.edu/assets/pdfs/G3658-8.PDF</a>	Open access. Direct comments to Ellen Taylor-Powell, RM 609 Extension Building, 432 N. Lake St., Madison, WI 53711	This is a compendium of ideas for how to evaluate partnerships.
Evaluation Guide: Fundamentals of Evaluating Partnerships	<a href="https://www.cdc.gov/dhdsp/docs/partnership_guide.pdf">https://www.cdc.gov/dhdsp/docs/partnership_guide.pdf</a>	No conditions for use. Contact: The Division for Heart Disease and Stroke Prevention, Applied Research and Evaluation Branch at cdcinfo@cdc.gov or (770) 488-2560.	Step by step guide for putting together a partnership evaluation. Contains several instruments.
Improving Community Health: A Framework for Assessing Community Readiness is a tool developed by NACCHO to look at five components of community readiness partnerships	<a href="https://www.naccho.org/uploads/downloadable-resources/Mobilizing-Community-Partnerships-Rural-Communities-NA608PDF.pdf">https://www.naccho.org/uploads/downloadable-resources/Mobilizing-Community-Partnerships-Rural-Communities-NA608PDF.pdf</a>	No conditions for use. Contact: NACCHO	Step by step guide for developing partnerships. It has a brief section on partnership evaluations including a useful checklist

Partnership Self-Assessment Tool	<a href="https://atrium.lib.uoguelph.ca/xmlui/bitstream/handle/10214/3129/Partnership_Self-Assessment_Tool-Questionnaire_complete.pdf?sequence=1&amp;isAllowed=y">https://atrium.lib.uoguelph.ca/xmlui/bitstream/handle/10214/3129/Partnership_Self-Assessment_Tool-Questionnaire_complete.pdf?sequence=1&amp;isAllowed=y</a>	Tool provided at no cost by the Center for the Advancement of Collaborative Strategies in Health at the New York	This tool focuses on how to improve the collaboration process.
The Wilder Foundation's Collaboration Factors Inventory	<a href="https://www.wilder.org/Wilder-Research/Research-Services/Pages/Wilder-Collaboration-Factors-Inventory.aspx">https://www.wilder.org/Wilder-Research/Research-Services/Pages/Wilder-Collaboration-Factors-Inventory.aspx</a>	The instrument is available, but for instructions on scoring and administration, you must purchase it. Contact: Mattessich, P., Murray-Close, M., & Monsey, B. (2001). <i>Wilder Collaboration Factors Inventory</i> . St. Paul, MN: Wilder Research.	The tool evaluates collaboration factors for small groups. The instrument is reliable.
W.K. Kellogg Foundation Evaluation Handbook	<a href="https://www.wkkf.org/resource-directory/resource/2010/w-k-kellogg-foundation-evaluation-handbook">https://www.wkkf.org/resource-directory/resource/2010/w-k-kellogg-foundation-evaluation-handbook</a>	No conditions for use for nonprofits. For permission requests contact the Communications Department at <a href="mailto:communications@wkkf.org">communications@wkkf.org</a>	Step by step evaluation guide for grantees, nonprofits, and community leaders.

## APPENDIX F: EVALUATION RESOURCE LIST

Tool	Access	Use	When Appropriate
Basic Guide to Program Evaluation (Including Outcomes Evaluation)	<a href="https://managementhelp.org/evaluation/program-evaluation-guide.htm">https://managementhelp.org/evaluation/program-evaluation-guide.htm</a>	Open for personal or professional use. See how to use sidebar for more information.	This site has a variety of management resources including a comprehensive evaluation guide.
Centers for Disease Control and Prevention: Evaluation Framework	<a href="https://www.cdc.gov/eval/framework/index.htm">https://www.cdc.gov/eval/framework/index.htm</a>	No conditions for use. Contact: For further information: <a href="mailto:cdceval@cdc.gov">cdceval@cdc.gov</a>	This website goes over the CDC evaluation framework in a step-by-step process.
Centers for Disease Control and Prevention: Evaluation of State Nutrition Physical Activity, and Obesity Plans	<a href="https://www.cdc.gov/obesity/downloads/EvaluationofStateNPAOPlans.pdf">https://www.cdc.gov/obesity/downloads/EvaluationofStateNPAOPlans.pdf</a>	No conditions for use. Contact: For further information, contact the Division of Nutrition, Physical Activity and Obesity (DNPAO), Program Development and Evaluation Branch at <a href="mailto:cdcinfo@cdc.gov">cdcinfo@cdc.gov</a> .	Tool is useful for shaping and put an evaluation together.
Centers for Disease Control and Prevention: Program Performance and Evaluation Office	<a href="https://www.cdc.gov/eval/resources/index.htm">https://www.cdc.gov/eval/resources/index.htm</a>	No conditions for use. Contact: <a href="mailto:cdceval@cdc.gov">cdceval@cdc.gov</a>	Comprehensive CDC evaluation resources. This site includes workbooks documentation, and theory.

# APPENDIX G: FORMAL EVALUATION REPORT TEMPLATE

**Title**

Completed by [author]

[date]

**Contents**

**Executive Summary**

**Introduction**

[sub header]

**Evaluation Methodology**

[sub header]

**Results**

[sub header]

**Recommendations**

[sub header]

**Appendix A**

**Appendix B**

## **Executive Summary**

[Text]

## **Introduction**

[sub header]

[Text]

## **Evaluation Methodology**

[sub header]

[Text]

## **Results**

[sub header]

[Text]

## **Recommendations**

[sub header]

[Text]

## **Appendix A**

[Text]

## **Appendix B**

[Text]

## APPENDIX H: WORKS CITED

1. Bay Area Regional Health Inequities Initiative. 2015. *Applying Social Determinants of Health Indicators to Advance Health Equity: A Guide for Local Health Department Epidemiologists and Public Health Professionals*. Oakland, CA.
2. Butterfoss FD, Francisco VT. Evaluating community partnerships and coalitions with practitioners in mind. *Health Promotion Practice* 2004; 5(2):108-114.
3. Centers for Disease Control and Prevention. Evaluation Guide: Fundamentals of Evaluating Partnerships. Atlanta: U.S. Department of Health and Human Services; 2008.
4. Centers for Disease Control and Prevention, Evaluation Technical Assistance Document: Division of Nutrition, Physical Activity, and Obesity (DNPAO) Partnership Evaluation Guidebook and Resources, 2011.
5. Framework for Program Evaluation - CDC. (2017, December 14). Retrieved April 11, 2018, from <https://www.cdc.gov/eval/framework/index.htm>
6. Mattessich, P., Murray-Close, M., & Monsey, B. (2001). *Wilder Collaboration Factors Inventory*. St. Paul, MN: Wilder Research.
7. NACCHO. *Mobilizing Community Partnerships in Rural Communities: Strategies and Techniques*. (2013).
8. NACCHO. *Improving Community Health: A Framework for Assessing Community Readiness*. (2017)
9. National Collaborating Centre for Methods and Tools (2008). *Partnership evaluation: The Partnership Self-Assessment Tool*. Hamilton, ON: McMaster University. (Updated 04 January, 2018) Retrieved from <http://www.nccmt.ca/resources/search/10>.
10. The New World Kirkpatrick Model. (n.d.). Retrieved April 12, 2018, from <https://www.kirkpatrickpartners.com/Our-Philosophy/The-New-World-Kirkpatrick-Model>

## APPENDIX I: GLOSSARY

**Biases:** the tendency which prevents unprejudiced consideration for a question or finding.

**Capacity Building:** the process of developing and strengthen the skills, instincts, abilities, processes, and resources that organizations and communities need to survive, adapt, and thrive.

**Limitations:** the characteristics of deign or methodology that impact or influence the interpretation of the findings from your evaluation.

**Mix Methods:** includes the mixing of qualitative and quantitative data, methods, methodologies, and paradigms.

**Partnerships:** s a collaborative effort between your health department and a community organization(s). We are not concerned with the degree of formality of the partnership, unless that is what you want to evaluate.

**Qualitative Method:** vary using unstructured or semi-structured techniques such as interviews and focus groups. Qualitative methods are often employed when looking for trends. The sample size is often small.

**Quantitative Method:** are more structured than qualitative methods and use measurable dead to formulate conclusions. These methods include surveys, polls, etc.

**Reliability:** the degree to which an assessment tool produces stable and consistent results.

**Sample:** is a group of people taken from a larger population.

**Validity:** the degree to which the assessment tool produces findings that are credible.



The mission of the National Association of County and City Health Officials (NACCHO) is to improve the health of communities by strengthening and advocating for local health departments.

1201 I Street, NW, Fourth Floor • Washington, DC 20005

Phone: 202.783.5550 • Fax: 202.783.1583

© 2022. National Association of County and City Health Officials

[www.naccho.org](http://www.naccho.org)