Activity: Developing an Evaluation Plan for Alliances and Partnerships

Goal

Develop a plan for evaluating existing alliances and partnerships

Prerequisites

Existing alliances or partnerships that require evaluation.

Who Should Participate?

Program leadership (strategic thinkers)

Length

90-120 minutes; activity can be repeated as necessary for different alliances or for the same alliance on a regular basis (e.g. annually)

Note

This activity is adapted from the book "Managing for Sustainable Development Impact: An Integrated Approach to Planning, Monitoring, and Evaluation" by Cecile Kusters and Karen Batjes. More in-depth information about each of the steps and questions below can be found in the book.

This activity works best with a facilitator to help move the group through each question, achieve consensus, and summarize/document the results of each question for use in the Partnership/Alliance Evaluation Template.

If there is disagreement on any element of the plan, the Gradients of Agreement (included below) may help achieve either consensus or a level of disagreement all are comfortable with.

Activity Instructions

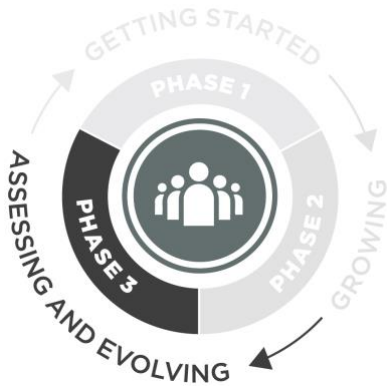1. Discuss and come to consensus on the purpose and scope of the evaluation.

What is the purpose of the partnership evaluation? Example reasons include: accountability, stakeholder empowerment, gathering information to make strategic change, gathering information to make operational change, and knowledge generation.

What is the scope of our evaluation? Who are the target groups (all partners? a specific partner?), what's our time frame, and what is our budget (time and/or money)?

2. Discuss and come to consensus on key information needs for the evaluation.

It may help to frame your qualitative information needs around the criteria of impact, relevance, sustainability, effectiveness, and efficiency.

   o Sample impact questions: What has changed as a result of this partnership? To what extent has the partnership helped us further our long-term goals? Has the partnership had any positive or negative consequences?

   o Sample relevance questions: Is the partnership a good idea given the long-term goals of our program? Does it support the priorities of our users and stakeholders?

   o Sample sustainability questions: Will the changes effected by the partnership last? Would there be continued positive impacts as a result of the partnership if it ended? Why or why not?

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- o Sample effectiveness questions: Were the planned purposes and/or outputs of the partnership achieved? Why or why not?

- o Sample efficiency questions: Is the partnership worthwhile? Is the partnership the best way to achieve the planned-for outcome? What could we do differently to improve the partnership?

You may also wish to gather quantitative information about the partnership, including things that are measurable, relatively easy *to* measure - length of partnership, contributions to the program (time, money, code) - and relevant to your analysis.

3. Discuss and come to consensus on data collection, processing, and analysis.

A RACI matrix can be helpful in determining who will be responsible for data gathering, processing, and analysis. Different members of the team may be better suited to different types of questions or information gathering methods, or different expertise applied for analysis.

In this framework, analysis is "an important part of the evaluation process because it shapes the information that is reported and its potential use after critically reflecting on and making sense of these findings so as to inform decision-making."

4. Discuss and come to consensus on the process for reflection and decision-making.

Determine how the program will reflect on and make use of the results of the information gathering phase. A written report discussed asynchronously? A meeting or series of meetings?

This process should link back to the original purpose of the evaluation; for example, if the program suspects that a partnership is

not working because of poor communication, a report suggesting improvements might be appropriate. If the purpose of an evaluation is to determine whether or not to continue working with a partner, an in-person or virtual meeting to discuss would be better.
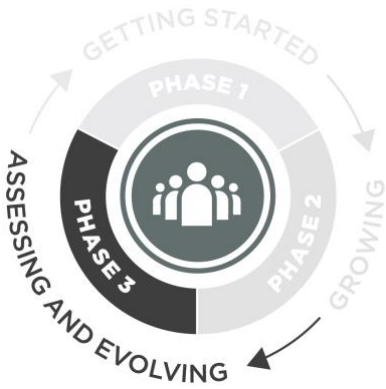
5. Discuss and come to consensus on communication and reporting.

How will the results of the evaluation be shared and reported on? Consider who the stakeholder/primary users will be; how to report on interim steps such as the kickoff, information gathering process, and results; and how the results will be shared.

At this point, if the discussion around the previous questions has been documented and summarized to everyone's satisfaction, the next elements can be assigned to someone for offline completion and sharing out with the group.

6. Plan for implementation.

Create a plan for implementation using the outcomes of the above discussion questions. You can use the Partnership/Alliance Evaluation Template to gather the results of the discussions, and fill out the sample RACI matrix for timeline and assignments.

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GRADIENTS OF AGREEMENT

1	**Endorsement**	
2	**Endorsement with minor point of contention**	
3	**Agreement with reservations**	
4	**Abstain**	
5	**Stand aside**	
6	**Formal disagreement, willing to go with majority**	
7	**Formal disagreement, desolved of responsibility**	
8	**Block/veto**	

Tally votes
in each box

To use the Gradients of Agreement chart:

1. Record the proposal being used (e.g., on a flipchart or virtual whiteboard/document)
2. Confirm that everyone understands the proposal, and make any necessary changes
3. Read through the gradient definitions, from Endorsement to Veto
4. Poll the participants to see where everyone stands. Note that the results show the level of support for a proposal, final decisions will take the results into account but are not based solely on the poll