

Evaluation Framework

During the early phases of the partnership, decisions will be made about what to measure and how to carry out that measurement. Criteria will need to be agreed – and included in the project work-plan – against which the success of the partnership can be judged. The structuring of the project will include a regular review process as well as provision for a more thorough evaluation. The participating organisations are likely to have their own internal monitoring and evaluation (M & E) requirements which will have to be satisfied.

By the “reviewing” phase of the partnering cycle many of these concerns will need to be addressed through effective measurement and review, which may lead to revision of the partnership’s procedures or outputs. There is no single approach for monitoring and evaluating a partnership: the methods used, data produced and analysis undertaken will depend on the partners’ requirements for information. The key to effective and constructive evaluation is a clear understanding of what each and all of the partners need to know about the partnership and its activities.

This outline reviews the three main types of partnership measurement that can be carried out. This does not mean that any partnership will use all of these approaches: where time and resources are limited, it is important to prioritise. Knowing the options for measurement – and for acting on its results – will help you allocate resources to the most appropriate form of evaluation in your project.

1. Measuring

Measurement in the context of partnership consists of three distinct, and related, aspects:

- i. Measurement of outputs
- ii. Measurement of impact
- iii. Measurement of process

Each of these requires a different approach to measurement and a different sort of evidence or data. It is critical that partners have an understanding of these different requirements at the outset of the project so that systems are put in place that enable the right data to be produced.

Although, in practice, many M&E exercises are undertaken at the end of a project, this is a far from ideal practice as the appropriate forms of evidence may not have been collected. Also, it limits the potential for partners to learn from their monitoring and review during the project itself. So, an ideal approach is to agree, at the start of the partnership:

- What needs to be monitored and measured (i.e. what do we need to know?);
- How that process will be carried out;
- Who will take responsibility for it;
- How information from the monitoring process will be used to enhance the partnership.

Monitoring and Evaluation can be a complex process. To help you –and your partners – think about good M&E, the paragraphs below summarise the three main types of measurement and use a single example to demonstrate how each might operate in practice.

i. Measurement of outputs

This is the most conventional form of measurement and will be integral to any well-prepared project plan. The critical question is whether the partnership has produced the deliverables to which it was committed in the original partnership agreement. These must be defined in measurable terms e.g. a number of small farmers trained in new techniques; a volume of goods produced in a given time; a quantity of communication material produced and distributed in a specific area.

Success or failure on this aspect of measurement will normally be fairly clear and unequivocal. If the partnership has put good review processes in place (see section ix below) then any potential shortfall in the planned outputs should have been predicted and accounted for at an earlier stage of the project.

CASE-STUDY EXAMPLE

A large not-for-profit organisation specialising in humanitarian relief works regularly – and productively – with one of the leading agencies of the United Nations. The two organisations often find themselves undertaking similar tasks, especially in the fields of advocacy, standard-setting and communication. In order to avoid duplicating effort and to make the best of their resources, they agree to form a partnership, with a shared office in one of their key regions of operation.

The partners draw up an agreement which specifies the desired deliverables from the partnership. These are defined as SMART objectives (Specific, Measurable, Attainable, Relevant, Timely) and an M&E process is agreed in which the deliverables will be reviewed at the end of the first 12 months of the partnership. The deliverables will include:

- The appointment of staff to manage and support the joint office
- The allocation of defined financial and physical resources to support the office;
- The production of communications material to inform other agencies and beneficiaries of the new venture;
- The creation of shared documentation relevant to that region of operation.

Once defined, these deliverables are not hard to review and to measure: they can be observed, counted or calculated. They tell the partners whether the basic aims of the partnership are being met.

ii. Measurement of impact

Measuring outputs is not the same as measuring impact: the agreed deliverables in a project will have been identified on the basis of a higher-level goal. Deciding whether that higher-level goal has been achieved is more challenging than simply quantifying outputs. We can monitor and observe that the right number of training courses have been organised for the agreed number of participants, for example, but how do we know that these participants have learned from the courses or that they will use what they have learned?

Impact measurement requires evaluation over a longer time period and greater scale, and a clear idea of what is being measured. It may be beyond the scope and resources of the

partnership to attempt this, but at the very least, partners should have a clear articulation of how they believe their outputs will create the desired long-term impact.

CASE STUDY EXAMPLE Part 2:

For both organisations, the achievement of the basic deliverables is only a means to an end. The overall purpose of creating the partnership is to reduce operating costs in that particular region, to improve the information and support provided to beneficiaries and, in the longer-term, to benefit from potential synergies between the partners.

We can see immediately that these are harder things to measure: to begin with there needs to be an agreed baseline for each factor so that comparisons can be made; secondly, the partners will need to engage other agencies and beneficiaries to assess their perception of the partnership's impact; most challenging of all, the partners may need to ask what would have happened if the partnership hadn't been created. So, the M & E may include questions such as:

- What were the costs to each partner in previous years?
- What would have been the costs in the period under study?
- How have overall costs been impacted by the costs involved in creating the partnership itself?
- Do beneficiaries recognise the work of the partnership?
- Do they perceive a difference in the quality of service since the creation of the partnership?
- How would services have been delivered without the partnership?
- Can the partners identify any specific value that the collaboration has created?

Measurement of process

This is the form of measurement that is most commonly overlooked in partnerships but it is the one that can contribute most to the success of the working relationship – and yield rich lessons for future partnerships.

The early phases of partnership, partners should be creating an agreement and putting in place procedures that will underpin good partnership practice. This includes establishing openness and transparency in communication; consistency and reliability in task-completion; equity and respect in the use of resources. For a partnership to flourish and to respond to changing circumstances over time, partners need to measure their success in achieving these good partnership practices. Review systems should include space for reflection on the lessons learned from working together and on the possible need for revision of collaborative systems as the partnership evolves.

Measuring process does not lend itself so naturally to quantification – much of the evidence will inevitably be qualitative, the subjective views and feelings of participants. Nevertheless,

such qualitative evidence can be carefully structured and recorded to give consistent feedback on the partnership's progress. Also, some factors (e.g. frequency of meetings; completion of tasks) can be quantified and used as evidence of the partners' ability to comply with agreed good practice. At even the most simple level, paying attention to partnership as a process – rather than a simply a means to achieve outcomes – will help partners to reflect on their experience and draw lessons which should be of value in subsequent collaborative work.

CASE STUDY EXAMPLE Part 3

Both of the preceding forms of measurement have looked at different kinds of outputs of the partnership. But a critical factor in achieving those outputs will be the quality of the day-to-day co-operation between the partner organisations and their representatives. Reviewing this process will provide insights into the factors that might be influencing the success or failure of the partnership at the level of output or impact.

Effective review of the partnering process will be greatly helped by a thorough partnership agreement and a detailed supporting work-plan: the more that these specify, the easier it will be to measure the operation of the process. For example, agreeing in advance the frequency of joint meetings, the modalities of reporting and the procedures for financial management will make it much simpler to monitor and measure compliance with the agreement. Nevertheless, some factors will remain difficult to quantify and will depend on personal judgements. A process evaluation may include such questions as:

- Are all representatives attending meetings as defined in the original partnership agreement?
- Has staff recruitment and management been carried out fairly and openly?
- Are decisions over financial allocations taken equitably and in a transparent fashion?
- Do those operating partnership feel that both partner organisations are committed – and contributing equally?