

Assessing Partnership Performance

Assessing Partnership Performance: Understanding the Drivers for Success provides easy to access guidance on what to look for when reviewing partnership progress. Building Partnerships for Development, the author and publisher, equips partnership practitioners with guidance that is simple enough to apply but comprehensive enough to tell them whether the effort was worth it or not. The document is designed to prompt partnership practitioners into discussion, particularly around areas that partners should agree at the outset and then review on a regular basis. This resource goes into some detail about:

- ★ Why we should assess a partnership's effectiveness;
- ★ What might go into such an assessment;
- ★ How such an assessment could be pursued; and
- ★ How to feed the learning back into the partnership.

Although the *Assessing Partnership Performance: Understanding the Drivers for Success* resource was created for water conservation partnerships, the themes are universal and can provide guidance for any partnership. The following is a summary of the resource. The full text is available on The Nature Conservancy's [Conservation Gateway website](#). Following the summary are direct links to a number of tables that contain additional information.

The Partnership Assessment Process

Reviewing the performance of partnerships involves an assessment of the results of the collaboration and how the partners work together. Partnerships are complex and evaluating them can take many forms. Some areas to be evaluated are:

- ★ Measuring a partnership's 'added value' by looking at the benefits that have been derived by different partners over time;
- ★ Assessing evolving partner relationships and their outcomes;
- ★ Investigating the transaction-costs involved in partnerships; and
- ★ Examining partnerships in relation to accountability to better understand their responsiveness, transparency and compliance.

“Partnership assessment is best initiated and conducted as a ‘conversation’ owned first and foremost by the partners themselves.”

External, organizational, and individual contexts are negotiated into a partnership's desired targets that determine how partners participate, which leads to partnership performance. Ideally, partnership performance then has an effect on external, organizational, and individual contexts.

Ultimately, the knowledge derived from this process will enable partners to make decisions about their role in a partnership and whether they are satisfied with the partnership's progress, have concerns, are dissatisfied or see no further benefits in remaining as a partner and seek to exit the partnership.

Why Assess a Partnership's Performance?

Assessments should be designed according to the expected use of findings and the intended audiences. A broad spectrum of assessment is possible ranging from periodic “health checks” to more formalized verification efforts (usually post-completion).

- ★ **“Health checks”** ask “Are we making progress as a partnership?”

- ★ **More formalized end-of-project assessments** ask, “Could we have achieved this result on our own?” and “If not, could we have paid someone else to achieve this same result?”

Assessments should provide information on what works and what does not at different stages of a partnership’s development. Internally, individual practitioners and organizations should be able to use the learning to refine their decision-making and practice around whether and how to engage in partnerships. Externally, learning from assessment efforts can help us to understand, and make the case for, when partnerships are appropriate and when they are not.

What to Assess?

Performance hinges upon the right partnership construct for the context, the willingness and ability of partners to deliver on commitments, and how partners reach decisions about how to allocate resources or focus their activities.

Unpacking Partner Participation

Partners collaborate in two primary ways, (1) by making and delivering on their commitments to the partnership and (2) by engaging in the on-going decision-making processes of the partnership. To assess whether sufficient resources have been committed and then delivered to achieve the goals of the partnership, possible questions include:

- ★ Can we prove that the partnership has generated more efficient ways of meeting our own targets?
- ★ Are there other alternatives that allow us to receive these same organizational benefits?
- ★ Do individuals have sufficient space in their work schedule and support from their organization to meet their commitments?

Possible questions to ask when assessing whether partners have sufficient incentives or obligations to contribute to decision-making include:

- ★ Do partners have influence in decision-making roughly equivalent to the risk presented to their organization?
- ★ Are organizations comfortable with the amount of control they have over how resources (their own and others) are allocated in the partnership?
- ★ Are there barriers to contributing to decision-making (associated costs, timing of meetings, agenda setting, chairing styles, document preparation, etc.)?

Unpacking Partnership Performance

Partnership effectiveness is about whether the partnership gets the results it was hoping for.

Partnership efficiency is the ability to make good use of members’ financial resources, non-financial resources and time. Efficiency can also be viewed in terms of the partnership’s capacity to influence positively and strategically those external factors that affect its ability to perform.

Key questions to ask to measure partnership responsiveness and efficiency include:

- ★ What drives the partnership to use partners’ financial resources efficiently and effectively?
- ★ What drives the partnership to initiate and maintain relationships with key contacts outside of the partnership?
- ★ What drives the partnership to analyze what changes have occurred in policy, legal, financial and regulatory areas in recent years, and what role the partnership played in these changes?

How to Assess Partnerships?

After deciding what to assess, partners need to discuss how to conduct the assessment. Key decisions that partners need to make in planning for an assessment should begin with who should participate and how they should be involved.

Who Should Participate in the Assessment?

Partners: Individuals or organizations that make substantive contributions to the partnership

Stakeholders: Groups who may be affected, influenced by or concerned with the work of the partnership. To determine whose risks matter most and whose opinion should carry more weight, clearer distinctions between those stakeholders that may exert an influence upon the partnership and those that are influenced by it are essential.

Partnership evaluators must be sensitive to the voice and presence of those who may be marginalized or excluded when conducting their work.

How Should Partners and Stakeholders be Involved?

The degree of both partner and stakeholder engagement in an assessment process will usually be determined by their ability and willingness to devote time and resources to the exercise.

All partners should be fully informed about the assessment and its purposes and understand how the information will be collected and used.

How Should Information be Collected and Organized?

Processes and indicators of assessment need to be carefully agreed towards the beginning of the relationship. Once decisions about indicators have been made, the next step is to think about which sources are most likely to yield the information needed and which methods are most appropriate for collecting it. The actual choice of tools will be largely influenced by cost, time required to obtain the information, and feasibility of the method.

Partnership data collection methods include:

- ★ Surveys and questionnaires
- ★ Interviews
- ★ Review of documentation
- ★ Observation
- ★ Focus groups
- ★ Case studies

To ensure that controversial viewpoints can be aired, an assessment process must reinforce the principle of confidentiality and the protection of anonymity for all who request it.

Who Carries Out the Assessment?

An “internal assessment” is designed and conducted by a team or an individual with direct connection to either the partnership or one of the partner organizations. An “external assessment” is designed and conducted by a team or an individual with no direct connection to the partnership or its partner organizations. Decisions about whether to use internal or external evaluators will depend on the goals of the assessment and the resources available.

Central to whatever choice is made, however, is the need to ensure that the team and all partnership members communicate regularly and openly about the expectations, design and implementation of the assessment.

Interpreting and Using Assessment Findings

Interpreting the Findings

Numbers and narrative statements collected from assessments need to be interpreted for and with partners. Information should be presented in a form in which intended users can digest it and relate it simply to the questions it is supposed to answer. Because the same information may be interpreted differently, it is helpful to look at it from various viewpoints to consider how it may be received and understood.

Communicating the Findings

For individual partner representatives, communicating the findings to their own organizations can help to justify continued participation in the partnership and promote greater institutional buy-in for it.

The following key questions may help decide which assessment findings remain internal to the partnership itself and what it is acceptable to share more publicly:

- ★ With whom are we obliged to share this information?
- ★ Who might want to receive this information?
- ★ Who would we like to receive this information about our partnership?
- ★ Who needs to know about our work for it to be successful in the long-term? What information should go to each partner/person and how?

To ensure that assessment information serves its purpose and promotes further learning, selecting appropriate presentation and dissemination options for each of the audiences identified is vital. Greater candor and integrity around the findings can only help put the partnership on a more honest footing, helping to communicate the challenges that the partnership is facing and thereby to manage the expectations around what the partnership can achieve.

The partnership assessment process should be treated as a learning journey with an emphasis on constantly improving the ability of partners to work together effectively.

Acting on the Findings

Think carefully about what a partnership and its members will do as a result of the insights and learning that emerge from the exercise. A review process should assist partners to make decisions based on whether they are satisfied and will remain in the partnership; have minor concerns and will stay with the partnership but may wish to make adjustments; are dissatisfied but seek to renegotiate the terms or the objectives of the partnership; or are completely discontented and will look for ways to exit the partnership.

Additional References

Assessing Partnership Performance includes several charts with additional prompting questions and thoughtful resources to help in with your partnership evaluation.

[Table 3a – Are partners delivering on commitments?](#) – p 13

[Table 3b – Do partners have sufficient incentives or obligations to contribute to decision-making?](#) – p 14

[Table 3c – Measures of Partnership Responsiveness and Efficiency](#) – p 16

[Table 4a – Partnership Data Collection Methods](#) – p 21

[Table 5a – Communicating Evaluation Information](#) – p 27

[Table 5b – Partnership Assessment – Learning and Action Opportunities](#) – p 28