Self-Evaluation Tool

for Action in Partnership

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Instructions

This tool focusses on different aspects of your partnership. It allows you to express your perceptions and opinions about your partnership experiences. It was designed to be used by members of a partnership who voluntarily participate in self-evaluation. It is not designed for accountability purposes or for results-based management.

For this tool to work properly, the partnership should:

1) be more than a place for information-sharing and networking;
2) be the venue for collaborative work on a specific project with resources.

The 18 items in this tool relate to six (6) requirements for effective partnership work[1]:

1) the range of perspectives relevant to the issue (items 1, 2);
2) early stakeholder involvement in strategic decisions (item 3);
3) engagement of stakeholders in negotiating and influencing decisions (item 4);
4) commitment of strategic and pivotal stakeholders to the project (items 5, 9, 10, 11);
5) partnership arrangements that favour equalization of power among the stakeholders (items 12, 13, 14, 16);
6) partnership arrangements that help build collective action (items 6, 7, 8, 15, 17, 18).

It takes an individual about twenty minutes to complete the questionnaire. Partners' responses to each question form the basis for evaluating your partnership. You will learn its strengths and weaknesses, as well as ways to improve your partnership.

Three ways to use the tool within your partnership:

1) Conduct a group discussion on each of the 18 items to come up with a collective evaluation.

2) Answer the questionnaire individually, and then talk as a group to arrive at a collective evaluation.

3) Answer the questionnaire individually, then compile all the responses, and then discuss them together. Pay particular attention to items for which answers are less favourable.

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[1] Bilodeau A, Galarneau M, Fournier M, Potvin L. L'Outil diagnostique de l'action en partenariat : Fondements, élaboration et validation [Self-Evaluation Tool for Action in Partnership: Foundation, development and validation]. *Canadian Journal of Public Health* 2011, 102(4):298-302.

Value of options:

For each item, options are valued from A (strongest) to C (weakest) in a random order, according to the following table. For example, for item #1, the 1st option is the weakest response and the 3rd option is the strongest response.

Items	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18
1st option	C	C	A	A	A	C	A	A	C	A	C	A	A	A	C	A	A	A
2nd option	B	B	B	B	B	B	B	B	B	B	B	B	B	B	B	B	B	B
3rd option	A	A	C	C	C	A	C	C	A	C	A	C	C	C	A	C	C	C

To compile the results:

Count the number of A, B, and C responses: for each of the 18 items, for all items related to each of the 6 requirements, or for all 18 items together.

Three types of partnership evaluation may be produced:

1) One-time evaluation

- **Strong/weak items OR strong/weak requirements:** the items or requirements that received the largest number of A responses indicate the strengths of your partnership. Those receiving the largest number of C responses indicate its weaknesses.
- **Items lacking consensus:** these indicate possible areas of controversy.
- **Items left blank:** these indicate that important aspects of partnership escape some of your respondents.

2) Longitudinal evaluation

The partnership evaluation could be longitudinal if it is repeated after a period of time. This evaluation could be done for each item or each requirement. It will show improvement or deterioration over time.

3) Summary portrait across multiple partnerships

A self-evaluation could be done by a number of partnerships within a similar context (e.g. same funder, same issue or same policy). If more than one partnership is experiencing difficulties with the same items or requirements, this could highlight collective issues.

Self-evaluation Tool for Action in Partnership

Affiliation (this list can be adapted):

☐ Community Group   ☐ Funder
☐ Public Sector   ☐ Individual

Role in the Partnership:

☐ Coordinating/Steering Committee member   ☐ Participant

How long has your organization been a member of this partnership? _____ years

How long have you been a member of this partnership? _____ years

For the items below, choose the option which best describes your partnership at this time (leave blank if you cannot answer):

1) **In our partnership, stakeholders connected to the issue and its options for action are included as partners.**

   ☐ There are not enough essential stakeholders to ensure a good understanding of the issue and to come up with appropriate options for action.

   ☐ Essential stakeholders are mobilized, but the participation of other stakeholders would help us have a deeper understanding of the issue and come up with appropriate options for action.

   ☐ All stakeholders needed to fully understand the issue and come up with appropriate options for action are mobilized.

2) **People with lived experience of the issue actively participate in our partnership.**

   ☐ Our partnership does not include any people with lived experience of the issue or any organizations serving populations with lived experience of the issue.

   ☐ People with lived experience of the issue or an organization serving populations with lived experience of the issue participate, but their point of view is rarely taken into account in decisions.

   ☐ People with lived experience of the issue or an organization serving populations with lived experience participate, and they have a real influence on decisions.

3) **In our partnership, partners are actively involved in analyzing issues and developing options for action, and not in implementation alone.**

   ☐ Partners are actively involved in defining issues and options for action.

   ☐ Partners are involved in making decisions about options for action on issues defined by others, such as public-service institutions or funders.

   ☐ Partners are only involved in implementing actions determined by others, such as public-service institutions or funders.

4) In our partnership, community groups have a real influence on decisions.

☐ Community groups have as much or more influence on decisions as do institutional partners or funders.

☐ Community groups are heard from, but their points of view are given less consideration than those of institutional members or funders.

☐ Community groups do not influence decisions.

5) In our partnership, partners are in a position to make decisions and commit resources.

☐ The majority of partners are in a position within their organization that allows them to make decisions and commit resources to the partnership.

☐ Partners represent their organizations, but are not in a position to make decisions or commit resources to the partnership.

☐ Partners engage primarily as individuals.

6) In our partnership, the exchange of diverse points of view expands the possibilities for action.

☐ Diverse points of view are expressed without really being supported (local data, experience-based knowledge and/or studies) and without being discussed in a way that expands the possibilities for action**.**

☐ Diverse points of view are expressed and supported (local data, experience-based knowledge and/or studies), but not discussed in a way that expands the possibilities for action.

☐ Diverse points of view are expressed, supported (local data, experience-based knowledge and/or studies) and discussed, which expands the possibilities for action.

7) In our partnership, the partners are able to identify their disagreements and discuss them.

☐ Partners express points of view which may diverge, and are able to discuss them openly.

☐ Partners express points of view which may diverge, but only discuss points of potential agreement.

☐ Only points of view that may lead to consensus are expressed and discussed.

8) In our partnership, partners succeed in resolving their disagreements.

☐ When they have divergent positions, partners are able to shift position in order to compromise.

☐ When they have divergent positions, partners rarely shift position and compromises are rare.

☐ When they have divergent positions, partners look to avoid the subject.

9) In our partnership, partner organizations continue to work together for the full duration of projects.

☐ Partner organizations leave in the middle of projects and this compromises project completion.

☐ Turnover in partner organizations weakens or slows progress on projects.

☐ Partner organizations continue to work together for the entire duration of projects.

10) In our partnership, essential resources for successful action are mobilized.

☐ Essential resources for running projects are mobilized.

☐ Some important resources are missing, but we still manage to make the projects work.

☐ Some indispensable resources are missing, which compromises the project operations.

11) Our partnership succeeds in bringing in the new stakeholders it needs to move forward.

☐ Partners do not really seek to engage other stakeholders who would allow the partnership to consolidate, improve, or take further action.

☐ Partners are unsuccessful in bringing in new stakeholders needed to consolidate, improve or take further action.

☐ Partners are successful in bringing in new stakeholders needed to consolidate, improve or take further action.

12) In our partnership, all points of view are given equal consideration in discussions and in decisions.

☐ In discussions and in decisions, all points of view are considered according to their value without regard for the social status of the partners.

☐ All partners express their points of view in discussions, but the opinions of those with more power carry greater weight in decision-making.

☐ Only the points of view of partners with more power are taken into account in discussions and in decisions.

13) In our partnership, everyone's part in carrying out activities is acknowledged equitably.

☐ Community partners' contributions to carrying out activities are acknowledged and compensated equitably.

☐ Community partners' contributions to carrying out activities are acknowledged, but are not compensated equitably.

☐ Community partners' contributions to carrying out activities are neither acknowledged nor compensated equitably.

14) Partners benefit equitably from the partnership.

☐ All partners obtain real benefits from their involvement to carry out their own missions.

☐ Certain partners obtain more real benefits, but all agree with this distribution.

☐ Certain partners obtain more real benefits, and others feel shortchanged.

15) In our partnership, partners can move beyond their own interests to find common ground in the interests of the populations they serve.

☐ Partners seek to meet their own interests first.

☐ Certain partners dominate, to the point of directing the action to meet their own ends.

☐ All partners mobilize their assets towards collective interests.

16) In our partnership, the criteria and mechanisms for accountability (reporting to whom, when and about what) are negotiated between the funders and funded community organizations.

☐ Criteria and mechanisms for accountability (reporting to whom, when and about what) are negotiated between the funders and the funded community organizations, and are determined by consensus.

☐ Criteria and mechanisms for accountability (reporting to whom, when and about what) are determined by the funders after consulting with the funded community organizations.

☐ Criteria and mechanisms for accountability (reporting to whom, when and about what) are determined by the funders alone.

17) In our partnership, partners mobilize around new, holistic options for action that go beyond simple coordination of each partner's actions.

☐ Partners work together to build new, holistic options for action instead of only coordinating their current action plans, programs or services.

☐ Partners focus mostly on coordinating current action plans, programs or services, but see the need to work together to develop new comprehensive options for action.

☐ Partners are chiefly dedicated to coordinating their different action plans, programs or services.

18) In our partnership, partners modify their actions, programs or services (what they already do) in order to arrive at new options for action.

☐ Partners agree to modify their actions, programs or services to facilitate the implementation of innovative projects.

☐ Few partners agree to modify their actions, programs or services when innovative projects require it.

☐ Each partner looks to maintain their existing actions, programs or services despite what innovative projects might require.