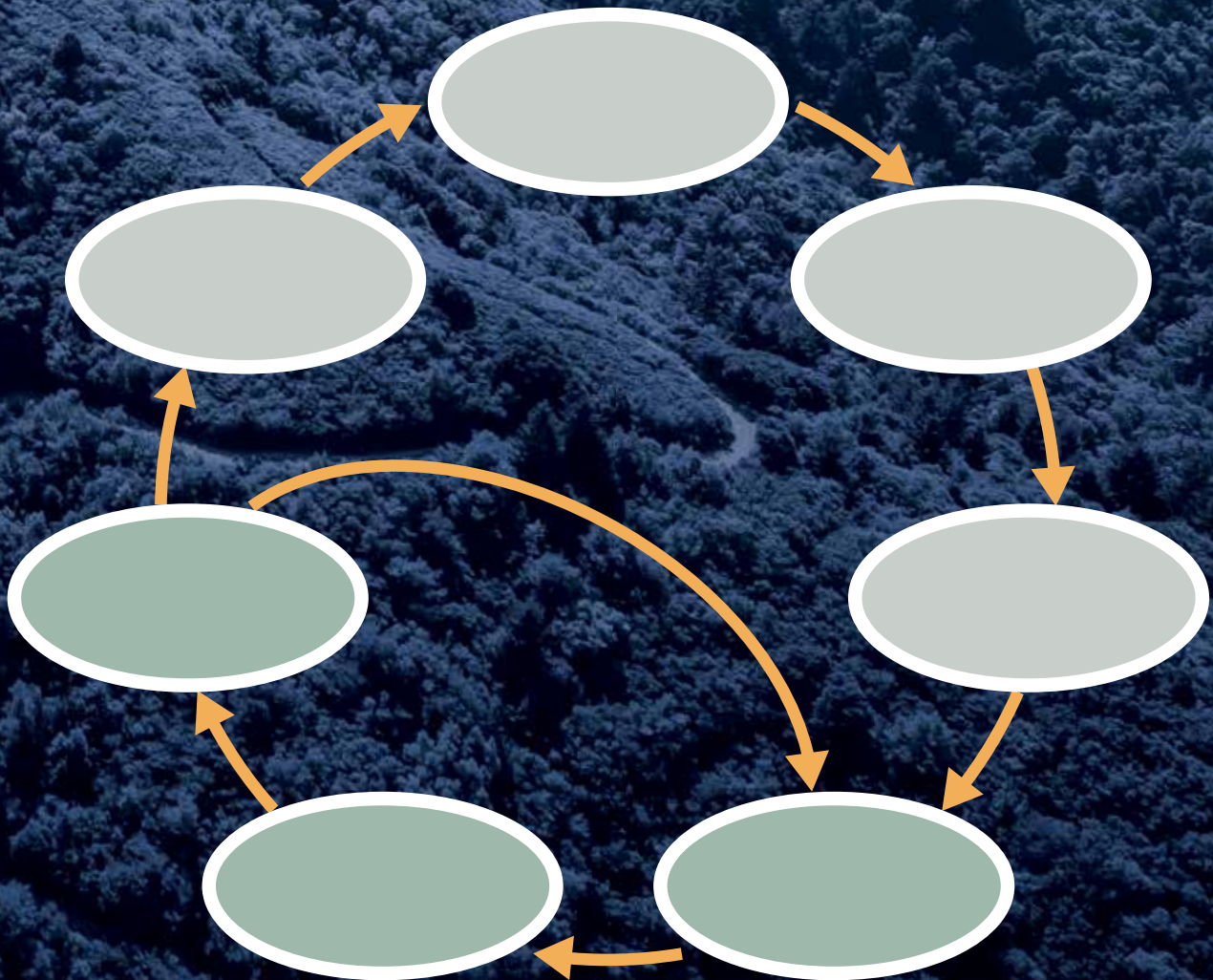


# PARTNERSHIP IMPACT EVALUATION GUIDE

By Amy Mickel, Ph.D. and Leigh Goldberg









## ACKNOWLEDGEMENTS & CREDITS

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One Tam is a landscape-scale collaborative based in Marin County, just north of the Golden Gate Bridge in California. Formally launched in 2014, One Tam is a partnership led by four adjacent but separate public agencies—Golden Gate National Recreation Area (GGNRA) under the National Park Service (NPS), Marin County Parks, Marin Municipal Water District (MMWD), and California State Parks—and one nonprofit organization, the Golden Gate National Parks Conservancy. The partnership includes the active participation of local community members and environmental leaders to advance a shared vision of a healthy future for Mount Tamalpais. Learn more about the work of the partnership at [onetam.org](https://onetam.org).

This guide is designed as a companion document to be used with *Generating, Scaling Up, and Sustaining Partnership Impact: One Tam's First Four Years* (Mickel & Goldberg, 2018). Partnerships are encouraged to use these resources to build, maintain, and sustain healthy collaborations and scale up their impact. In referencing or republishing this information, including graphics in any form, please include the following credits:

*The **Partnership Impact Model**<sup>™</sup> was created by Amy Mickel, Ph.D. and Leigh Goldberg based on the work and impact of the One Tam collaborative and findings from a four-year partnership study. The project was funded by the S. D. Bechtel, Jr. Foundation, commissioned by the Golden Gate National Parks Conservancy, guided by One Tam Director Sharon Farrell, and supported by One Tam agency partners. This model was first published in the study's final report, *Generating, Scaling Up, and Sustaining Partnership Impact: One Tam's First Four Years* (Mickel & Goldberg, 2018).*

The **Partnership Impact Model**<sup>™</sup> is the suite of concepts and processes that partnerships should consider when it comes to delivering, measuring, evaluating, and communicating the value of their collaboration. The **Partnership Impact Model**<sup>™</sup> includes the **11 Partnership Impacts, Scaling Up Partnership Impact**<sup>1</sup>, the **Partnership Impact Roadmap**, and the **7 Steps of Partnership Impact Evaluation**.

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Digital copies of these publications are available at [onetam.org/PIM](https://onetam.org/PIM).

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<sup>1</sup> The graphic entitled the *Partnership Impact Model* depicted in *Generating, Scaling Up, and Sustaining Partnership Impact: One Tam's First Four Years* has been updated and renamed *Scaling Up Partnership Impact*.

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## ABSTRACT

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Understanding, measuring, and communicating a partnership’s “value added” or “impact” is important to successfully optimize collaboration, yet evaluating partnership impact has often been difficult for landscape-scale partnerships and the partnership field in general. This guide is designed to help multi-sector partnerships undertaking long-term, systems-level collaboration to best define, measure, and evaluate impact. The **7 Steps of Partnership Impact Evaluation** is presented as a framework to assist these partnerships with the recurring process of conducting impact evaluations. Partnerships are encouraged to use this guide in conjunction with the other elements of the **Partnership Impact Model™**: the **11 Partnership Impacts**, **Scaling Up Partnership Impact**, and the **Partnership Impact Roadmap**.



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# PREFACE

**M**ulti-sector collaboration continues to be on the rise in North America. Diverse areas from healthcare, homelessness, and affordable housing to education, social justice, sustainability, and environmental conservation are embracing long-term, systems-level collaboration between many actors as an essential pathway to generating lasting impact. At the same time, the practice of measuring and evaluating the impact of a diverse network of actors is still developing (Cabaj, 2017).

Many conservation and stewardship practitioners, policymakers, and funders believe that the United States will continue to see an emergence of new landscape-scale partnerships as well as deepening levels of collaboration and integration among existing partnerships (Goldberg, 2018). Despite this trend, an agreed-upon set of indicators of any type of partnership impact, including landscape-scale work, does not exist. Moreover, much of the partnership evaluation research has focused on public health sector collaborations and initiatives because they have a longer history and are more established as a practice than those in other fields.<sup>2</sup> Because the field of landscape-scale conservation and stewardship is still maturing by comparison, there is a shortage of evaluation research specifically designed for these types of collaboratives (Goldberg, 2018). And while public health sector partnership evaluation tools and metrics can inform assessments of landscape-scale partnerships, the unique dynamics and work of these stewardship partnerships can greatly benefit from customized evaluation tools. Therefore, the demand for proven and scalable partnership evaluation frameworks, which can be employed throughout the lifespan of a partnership and applied to collaboratives working across many different geographic scales, will likely continue to grow.

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<sup>2</sup> Based upon the extensive literature review conducted.



# INTRODUCTION

Introduced in this guide, the **7 Steps of Partnership Impact Evaluation** provides a framework that can be used by partnerships to conduct impact evaluations and is designed to be used with other resources introduced in *Generating, Scaling Up, and Sustaining Partnership Impact: One Tam's First Four Years* (Mickel & Goldberg, 2018)—a publication of findings from a four-year study of the One Tam collaborative based in Marin County, California ([onetam.org](http://onetam.org)). Commissioned by the Golden Gate National Parks Conservancy and funded by the S. D. Bechtel, Jr. Foundation, the *One Tam Four-Year Partnership Study* was designed to identify the complex elements of partnership impact, with the goal of sharing the findings broadly with others in the field in California and nationwide.

The primary contributions emerging from this study, which together form the **Partnership Impact Model™**, include the **11 Partnership Impacts**, **Scaling Up Partnership Impact**, the **Partnership Impact Roadmap**, and the **7 Steps of Partnership Impact Evaluation**.

The **11 Partnership Impacts** is a framework that explicitly highlights the collection of impacts that landscape-scale stewardship partnerships should consider when it comes to delivering and measuring the value of their collaborative initiatives; it can be used to help identify *what* impact looks like for them. **Scaling Up Partnership Impact** illustrates the dynamic process and interdependence between *foundational*, *operational*, and *outcome* impact classifications in order to generate, scale up, and sustain impact throughout the partnership lifecycle. The **Partnership Impact Roadmap** and the **7 Steps of Partnership Impact Evaluation** are designed to provide guidance to multi-sector partnership practitioners and funders undertaking long-term, systems-level collaboration on *how* to identify, define, and measure various indicators of impact. To optimize and scale up partnership impact, these resources should be used together by collaboratives to help define, convey, and evaluate their impact.

### THE “WHY” OF PARTNERSHIP IMPACT EVALUATIONS

Systems-level, sustained collaboration requires considerable investment. As such, everyone from the partner executives and community stakeholders to funders, donors, and policymakers care about understanding a partnership’s return on investments. The idea of collaboration intuitively makes sense to most people, but how do we really know that the sum is truly greater than its parts? Do the hypothesized benefits of partnership truly result in advantageous change and meaningful impact? If so, how can partnerships demonstrate that they are truly making a difference? Partnership impact evaluations can help address these questions.

In addition, there are numerous reasons for a partnership to adopt a culture of conducting ongoing impact evaluations throughout its lifecycle. Perhaps most importantly, achieving a shared partnership vision may not be fully actualized without having a tangible framework in which the partnership’s success will be measured. Collecting data and measuring results in a consistent way across all participants is critical in ensuring that collaborative efforts remain aligned. Impact measurement also enables partners “to hold each other accountable and learn from each other’s successes and failures” (Kania & Kramer, 2011).

Furthermore, partnerships should continually demonstrate and communicate what their value is in order to secure the necessary resources (human, capital, and financial) that are needed to sustain their collaborative efforts. Partners must adequately understand the value of their partnership before they can convey it to others. Lacking a clear picture of a partnership’s value can be detrimental to its sustainability as it can impede continued partner investment, fundraising, and capacity building—all of which are essential to a partnership’s long-term impact and success (Goldberg, 2018). Impact evaluation enables partners to share evidence of incremental progress with key audiences including partners, board members, funders, donors, and community stakeholders.

Impact evaluation enables partners to share evidence of incremental progress with key audiences including partners, board members, funders, donors, and community stakeholders.



## INTRODUCTION

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Partnership impact evaluation provides a critical runway for having candid conversations about potentially uncomfortable topics such as disparate pacing expectations, transparency and trust, and concerns about equity and performance.

In addition, adopting a culture of recurring partnership impact evaluation enables partners to take the pulse of their partnership's health, to adapt and address concerns in a timely fashion, and to better understand the benefits of collaboration. Partnership impact evaluation provides a critical runway for having candid conversations about potentially uncomfortable topics such as disparate pacing expectations, transparency and trust, and concerns about equity and performance.

### UNDERSTANDING PARTNERSHIP IMPACT

Despite the many benefits of evaluating a partnership's "value added" or "impact,"<sup>3</sup> conveying this information is difficult for a range of reasons, including: "long timescales for achieving impact, different perspectives on what success means, the complexity and variability of partnership interventions, and the different contexts within which partnerships work" (Boydell, 2007, p. 3). As a result, there has been a shortage of research assessing partnership impact, value, and benefits in this sector until recently.

To gain an accurate representation of partnership impact, the authors' recent study revealed that partners should define their impact as a collection of contributing impacts instead of exploring them in isolation, which has more commonly been done in the research conducted to date. As the **11 Partnership Impacts** framework demonstrates, a collective picture of the three impact classifications (*foundational*, *operational*, and *outcome*), and the interdependent relationship between them, should be considered when partners endeavor to most accurately assess their impact and value. Groups should not rely solely on partnership evaluations that assess single variables (such as partnership health, effectiveness, or satisfaction) or single approaches (such as social network analysis), as the study concludes that each represents only one piece of the larger picture. By applying a more comprehensive framework that treats partnership value as a system of multiple interdependent and scalable impacts, partnership practitioners can more accurately capture, assess, and communicate their impact.

<sup>3</sup> Impact is the term commonly used throughout this report to represent value or value added.

## INTRODUCTION

Partnership impact is defined as the collection of qualitative and quantitative changes that is generated incrementally over time related to or directly resulting from the intentional scaling up of *foundational*, *operational*, and *outcome impacts* by a group of partners.

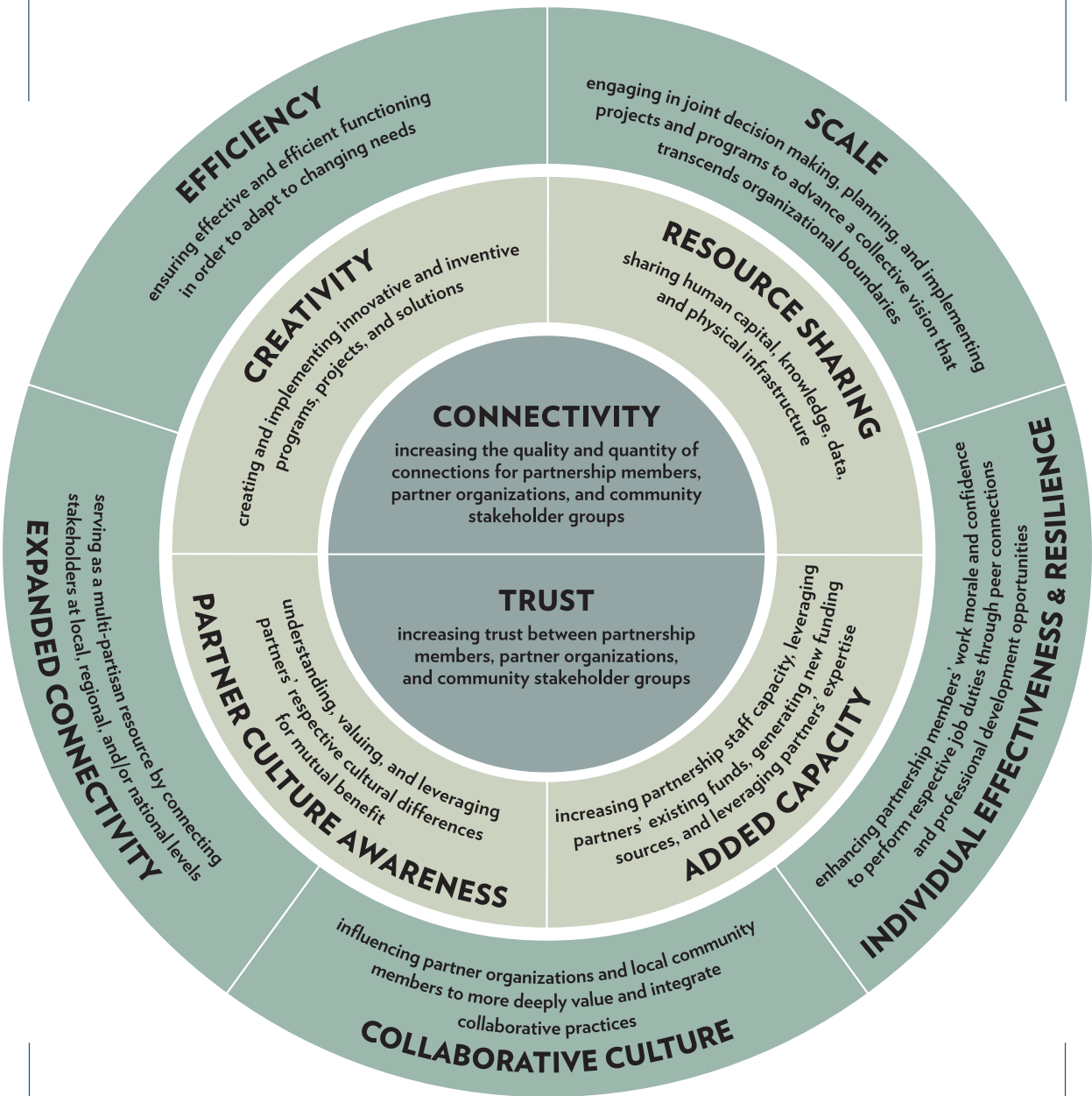
As discussed earlier, the **11 Partnership Impacts** and **Scaling Up Partnership Impact** evolved as outcomes of the *One Tam Four-Year Partnership Study*. Researchers found One Tam's value generation to: (a) consist of a system of 11 interdependent, scalable impacts that are grouped into three impact classifications (*foundational*, *operational*, and *outcome*) and (b) be a dynamic process that occurs over time. Based on these findings, partnership impact is defined as the collection of qualitative and quantitative changes that is generated incrementally over time related to or directly resulting from the intentional scaling up of *foundational*, *operational*, and *outcome impacts* by a group of partners.

*Foundational impacts*, **connectivity** and **trust**, are essential building blocks for a highly functioning partnership, as it is unlikely that the other impact classifications (*operational* and *outcome*) would be optimized or sustained without them. *Operational impacts*—**creativity**, **resource sharing**, **added capacity**, and **partner culture awareness**—are impacts that benefit the partnering organizations and the partnership itself. *Outcome impacts* are those that partnerships aim to fulfill through collaborative work. For One Tam, these include **efficiency** and **scale**, as well as three unanticipated impacts: **individual effectiveness and resilience**, **collaborative culture**, and **expanded connectivity**.

The researchers also discovered that the three impact classifications and the 11 individual impacts are not achieved independently of each other; they are symbiotic. Moreover, generating impact is a dynamic, iterative process that is accomplished throughout the three phases of a partnership's lifecycle.

The three phases of a partnership lifecycle include start-up, building, and maintaining and sustaining phases. These are adapted from the Centers for Disease Control and Prevention's Partnership Evaluation Guidebook (Centers for Disease Control and Prevention, 2011). Certain types of partnerships designed for project-level, transaction-based, or shorter-term impact may scale down or terminate once the partnership's goals have been met. Partnerships may also experience a phase of reinvention if the original vision is no longer relevant.

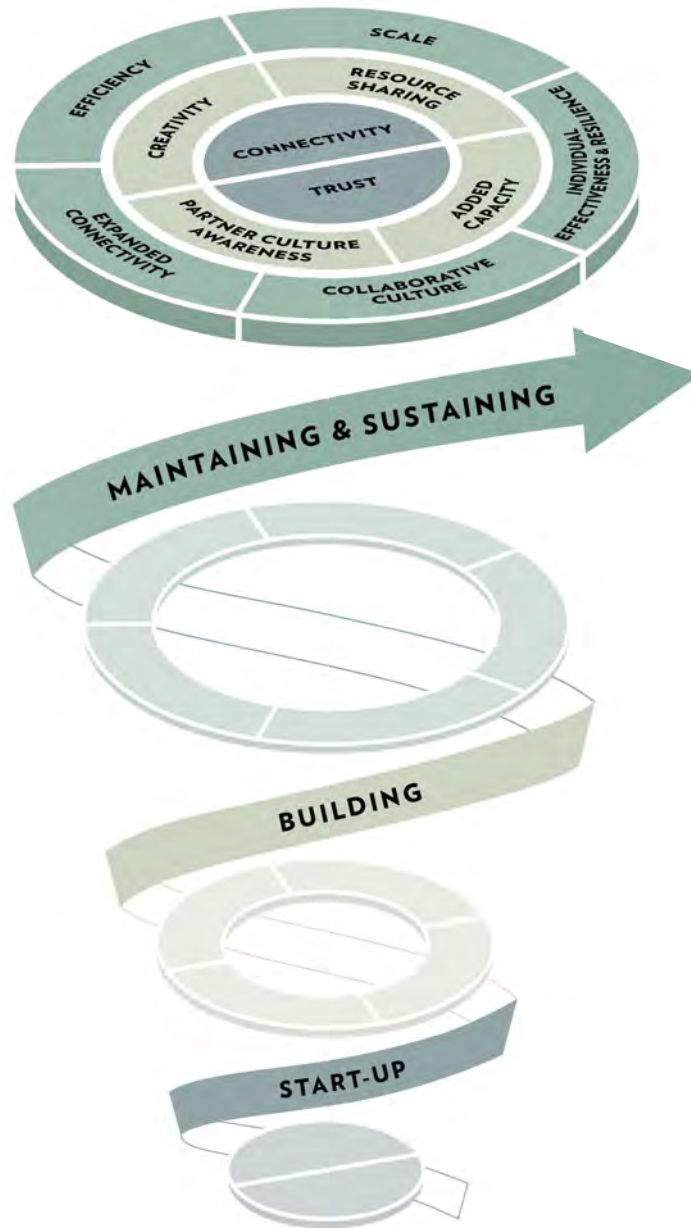
# 11 PARTNERSHIP IMPACTS



Foundational Impacts
  Operational Impacts
  Outcome Impacts



## SCALING UP PARTNERSHIP IMPACT



This graphic illustrates the dynamic, interdependent nature of scaling up impact throughout the three phases of a partnership’s lifecycle. The process starts with upfront investments in *foundational impacts* and *operational impacts*. As a partnership moves into its building phase, *operational impacts* and *outcome impacts* will begin to materialize. By leveraging *foundational* and *operational impacts* and adding ample, incremental investments, *outcome impacts* can be fully realized over time for exponential benefits during a partnership’s maintaining and sustaining phase.

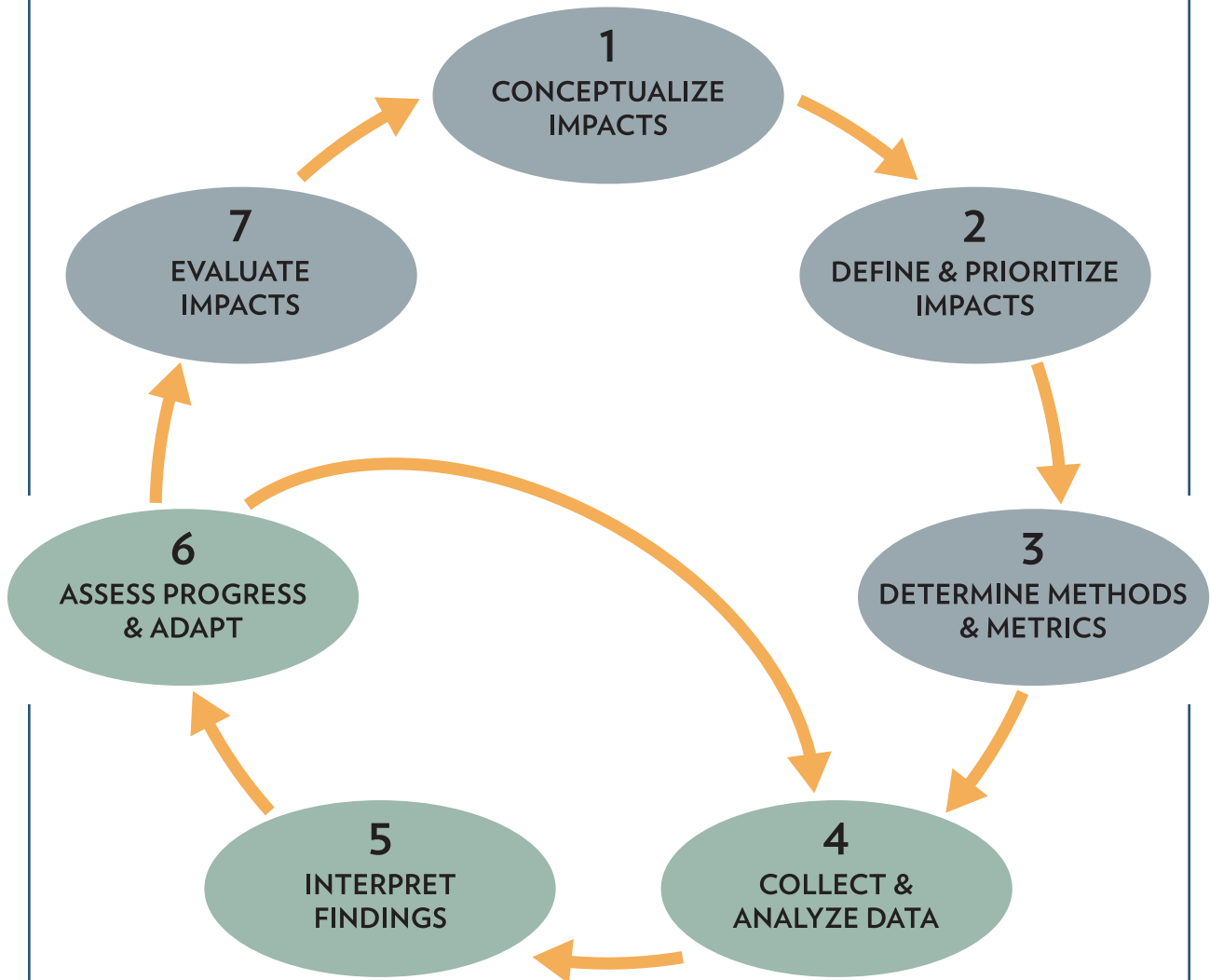
# EVALUATING PARTNERSHIP IMPACT

Partnership impact evaluation is described as a 7-step recursive process. Similar to generating, scaling up, and sustaining partnership impact, the evaluation of partnership impact is a dynamic process that should recur throughout a partnership's lifecycle. This recursive process consists of 7 main steps: (1) **conceptualize impacts**, (2) **define & prioritize impacts**, (3) **determine methods & metrics**, (4) **collect & analyze data**, (5) **interpret findings**, (6) **assess progress & adapt**, and (7) **evaluate impacts**.



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## 7 STEPS OF PARTNERSHIP IMPACT EVALUATION

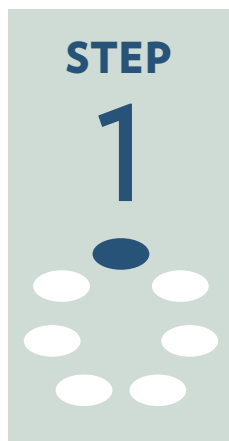


This figure illustrates the dynamic, recursive process of partnership impact evaluation throughout the duration of the chosen evaluation timeframe. Steps 1, 2, 3, and 7 are each conducted one time during the chosen evaluation timeframe. Steps 4, 5, and 6 recur multiple times throughout the evaluation timeframe. This 7-step process should be repeated throughout a partnership's lifecycle.



## EVALUATING PARTNERSHIP IMPACT

It is important to remember that each of the 7 steps is scalable to meet the unique needs and circumstances of each partnership.



During this step, partners are encouraged to brainstorm all impact possibilities that might occur as a result of collaborative efforts.

The next section describes the **7 Steps of Partnership Impact Evaluation** in greater detail. These sections are approached as if the audience is conducting an evaluation for the first time. It is important to remember that each of the 7 steps is scalable to meet the unique needs and circumstances of each partnership.

### CONCEPTUALIZE IMPACTS

The first step of a partnership impact evaluation is to conceptualize all possible impacts that could result from collaboration. This step is essential and yet oftentimes overlooked by partnership practitioners. To help with this step, one question to contemplate is: *What are the potential impacts of your partnership in comparison to what would have happened or not happened in the absence of its existence?*

During this step, partners are encouraged to brainstorm all impact possibilities that might occur as a result of collaborative efforts. As a recommended starting point, consider the **11 Partnership Impacts** identified on page 9 to determine if and how any of the impacts may currently apply to your partnership.

If the partners have not done so already, it is important to understand and agree to the rationale and process for conducting a partnership impact evaluation and how the outcomes from an evaluation process can best help them optimize their collective impact.<sup>4</sup> During this step, partners should also begin to discuss the optimal timeframe for the impact evaluation, including the frequency of collecting and analyzing data to assess incremental progress. This preliminary discussion will set the stage for the next two steps.

<sup>4</sup> Refer to the section entitled *The “Why” of Partnership Impact Evaluations* for a preliminary list of benefits.



Prioritization of impacts should be aligned with where partners intend to invest time, energy, and resources.

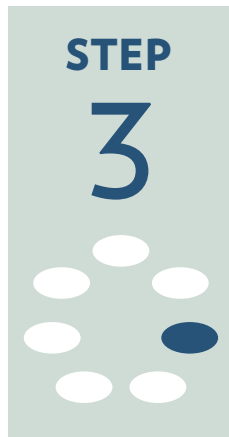
### DEFINE & PRIORITIZE IMPACTS

During this step, it is suggested that partners use the **Partnership Impact Roadmap** (see Appendix A) as a tool to help define and prioritize which impacts to evaluate. When defining an impact, partners will also want to develop indicators that will be used to measure and evaluate progress. Typically, each impact will have multiple indicators (ranging from two to four) associated with it. Examples of indicators are provided in Appendix B for one impact from each of the *foundational*, *operational*, and *outcome* impact classifications.

For partnerships that are either in the *start-up* phase or conducting a partnership impact evaluation for the first time, it is recommended that indicators focus on general changes in trends over time (see Appendix B for examples). Developing indicators with specific thresholds can be unrealistic and demoralizing, as some partnerships can have a tendency to set overly ambitious goals and then not meet those thresholds. During this stage, it is advisable to consult a social scientist researcher (e.g., internal staff researcher, external consultant, or academician) when developing the indicators to start a discussion about appropriate methods to assess them.

After defining impacts and developing indicators, partnerships will want to prioritize which impacts from its list of all possible impacts it will want to focus on during that particular evaluation cycle. Prioritization of impacts should be aligned with where partners intend to invest time, energy, and resources. Partnerships may want to consult with funders and other key stakeholders and invite them to contribute their input during this process.

A partnership in earlier phases of its lifecycle may want to evaluate progress related to *foundational impacts* (**trust** and **connectivity**) and *operational impacts* (**creativity**, **added capacity**, **resource sharing**, and **partner culture awareness**). Partnerships that are further along in their lifecycle might consider focusing on *outcome impacts* related to **efficiency**, **scale**, and **expanded connectivity**, in addition to the *foundational impacts* of **trust** and **connectivity**. While partnerships are encouraged to evaluate multiple impacts during an evaluation cycle, they should also be mindful of available resources and partner staff time.



When deciding on an evaluation timeframe, partnerships should consider a variety of factors such as the lifecycle phase of the partnership, project funding, motivation of staff, goals set by the partnership, and joint expectations of the partnership's overall pace.

### DETERMINE METHODS & METRICS

In Step 3, partnerships will first want to finalize an evaluation timeframe and decide on methodology. After accomplishing these tasks, decisions around the frequency and appropriate time intervals for implementing the next three recurring steps (Steps 4, 5, and 6) will need to be made.

#### FINALIZE EVALUATION TIMEFRAME

As a part of this step, partnerships should finalize a timeframe over which they want to evaluate impacts. Working through the **Partnership Impact Roadmap** will help partners determine what evaluation timeframe is appropriate for them. Evaluation timeframes can range from three to ten years. When deciding on an evaluation timeframe, partnerships should consider a variety of factors such as the lifecycle phase of the partnership, project funding, motivation of staff, goals set by the partnership, and joint expectations of the partnership's overall pace.

For those partnerships which are undertaking some type of goal-setting planning process, it is recommended to deliberately align the evaluation process and timeframe with the partnership's planning process and timeframe. For example, if a partnership is developing a five-year strategic framework, the evaluation timeframe should also be five years.

#### DECIDE ON METHODOLOGY

At this point, partners will need to decide on methodology and should consult with a social scientist researcher (e.g., internal staff researcher, external consultant, or academician) to determine the most appropriate methods. At this stage, decisions will be need to be made around data collection and analyses: this is a vital step to ensure that findings from an evaluation process are meaningful.

##### Methods to Consider

Surveys, phone and in-person interviews, focus groups, and/or field observations are just a few examples of methods that can be used to collect data. Surveys are one of the most efficient ways to collect data from a large number of study participants; more specifics about creating surveys are described later. Interviews can be particularly effective for gaining deeper insight and context, as well as for start-up partnerships or those embarking on a major transition or re-invention.



Social network analysis (SNA) has been recommended as a methodology that should be integrated into partnership evaluation.

Social network analysis (SNA) has been recommended as a methodology that should be integrated into partnership evaluation (Provan, Veazie, Staten, & Teufel-Shone, 2005) and one that partnerships should consider. SNA assesses relationships between partnering agencies and other stakeholder organizations. This method analyzes social structures through the use of network and graph theories with the main focus on relationships (or edges) among groups. Groups are represented as nodes and the linkages (e.g., relationships, interactions) are represented as edges or lines. SNA has been used to study connections (or connectivity) among health sector partner organizations, where “*connectivity* is defined as the measured interactions between partners in a collaborative such as the amount and quality of interactions and how these relationships might change over time” (Varda, Chandra, Stern, & Lurie, 2008, p. E1). There are a number of social network analysis computer programs that can be used for this type of analysis, and surveys are one way to collect data for this type of analysis.

### Survey Methodology Tips

If using survey methodology, partners (and their social scientist advisor(s)) will need to: (a) determine which impacts the survey is designed to measure, (b) develop survey items (e.g., statements, questions) that align with the chosen impact indicators from Step 2, and (c) decide on the appropriate audience(s) to complete the survey(s).

For example, if a partnership decides on surveys as the method to collect data for a social network analysis, it will need to determine which impacts and affiliated indicators that survey is designed to assess. Of the **11 Partnership Impacts**, ones that make sense for social network analysis include ***connectivity, trust, efficiency, scale, collaborative culture***, and ***expanded connectivity***.

Appropriate audiences to include in the survey distribution may include partner agencies and other stakeholders invested in the stewardship and protection of a specific landscape (e.g., environmental, recreation, and volunteer groups; park visitors; and other community members).

If a partnership is interested in measuring impacts from the perspectives of those directly involved with the partnership, creating a survey to distribute to partner staff may be most appropriate. All impacts highlighted in the **11 Partnership Impacts** can be evaluated through partner staff surveys. A partner staff survey can also be used as a developmental tool to assess and

## EVALUATING PARTNERSHIP IMPACT

improve a partnership's health by providing a partnership with an opportunity to reflect and adapt accordingly.

For both types of surveys, inclusion of Likert-scale questions (1-5) and open-ended questions should be considered. Examples of survey items (i.e., questions and statements) are provided in Appendix B for one impact from each of the *foundational*, *operational*, and *outcome* impact classifications; these are aligned with the impact indicator examples in Step 2. When finalizing a survey, partnerships should be mindful about the time commitments they are requesting of survey respondents.

### DETERMINE SCHEDULE FOR THE RECURRING STEPS

At this stage, partners will determine how frequently data will be collected and analyzed to evaluate incremental progress towards those impacts. In other words, partners need to agree on how often they will cycle through the next three recurring steps—**collect & analyze data, interpret findings, and assess progress & adapt**—during the specified evaluation timeframe.

Available resources, chosen methodology, evaluation timeframe, time requested of study participants, and partner staff commitment are some of the factors that should be considered when choosing the frequency and appropriate time intervals for implementing Steps 4, 5, and 6. Partnership lifecycle phase should also be taken into consideration. For example, a partnership in a *start-up* or *building* phase may decide on a five-year evaluation timeframe in which partner staff data are collected annually and social network data are collected every two years, whereas an established partnership that is in its *maintaining and sustaining* phase might collect both partner staff and social network data every two years over a six-year timeframe. It is important to remember that this process is scalable to meet the unique circumstances of each partnership.

It is important to remember that this process is scalable to meet the unique circumstances of each partnership.



COURTESY GOLDEN GATE NATIONAL PARKS CONSERVANCY

### STEP

# 4



Providing incentives has proven to be an effective way to increase survey response rates. In addition, providing incentives such as stickers, hats, maps, or other items that are branded with a partnership's logo can help increase a collaborative's visibility in its community.

## COLLECT & ANALYZE DATA

After completing Step 3, it is now time to collect and analyze data. In addition, data should be stored appropriately for future analyses.

### DATA COLLECTION

When collecting survey data, consider both online and pen-and-paper options. Disseminating surveys online is an efficient way to quickly reach a wide range of study participants; it also allows people to choose when they complete the survey, which makes sense for surveys that take a longer time to complete. The pen-and-paper option may be more appropriate when a survey is short and study participants are gathered together for another purpose. For example, a short survey could be distributed to partner staff during the last ten minutes of a meeting. When collecting interview data, consider the options of in-person and phone interviews with specific individuals and focus groups.

Partnerships should consider having an independent third party (e.g., independent social scientist, consultant, or academician) collect the data, for this tends to result in study participants being more transparent and authentic in their responses. Partnerships interested in consulting with universities should consider contacting colleges or departments offering programs in the fields of business, psychology, sociology, environmental studies, and parks administration and tourism. This could also be an appropriate opportunity for a graduate student project.

Regardless of whether data is collected by a third party or in-house, study participants should be assured of confidentiality. One way to do this is to explain that data will be aggregated and presented collectively, without identifying any particular individual. This produces more accurate, useable data.

Providing incentives has proven to be an effective way to increase survey response rates. In addition, providing incentives such as stickers, hats, maps, or other items that are branded with a partnership's logo can help increase a collaborative's visibility in its community.

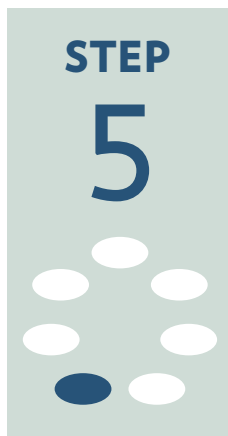
### DATA ANALYSES & STORAGE

As discussed in Step 3 (*Determine Methods & Metrics*), how the data will be analyzed should have been decided prior to data

collection. It is highly recommended to have a trained researcher, statistician, or staff familiar with data analysis and analytics assist with the data analyses; it is preferable to have it be the same person(s) whom partners consulted with in Step 3.

Types of analyses are contingent upon the data collected. For quantitative data (Likert-scale survey questions), a statistical analysis makes sense. For qualitative data (open-ended survey questions and interviews), a content analysis is appropriate. For social network data, social network analysis is needed.

Data will also need to be stored for future analyses. When storing data, factors such as security and how to best categorize data for future analyses need to be taken into account. When storing data, it is of the utmost importance to protect study participants' identities and maintain anonymity.



When data are collected for the first time in an evaluation cycle, these data will be considered the “baseline” that future data will be compared against.

### INTERPRET FINDINGS

Undertaking this step enables your partnership to make sense of the findings relative to the chosen impact indicators. Interpreting quantitative findings should be approached through the lens of conducting a longitudinal study. When data are collected for the first time in an evaluation cycle, these data will be considered the “baseline” that future data will be compared against.

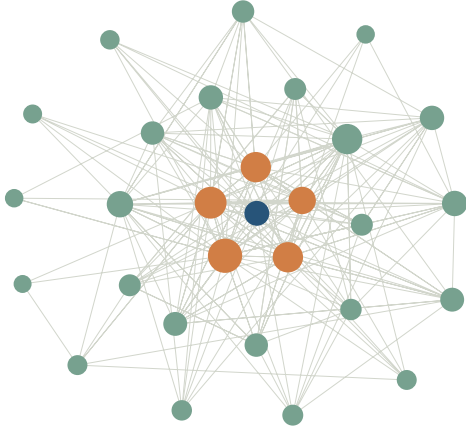
One example of comparing data from the *One Tam Four-Year Partnership Study* is the social network analyses of One Tam’s informal network from Year 1 (Baseline) to Year 4. The interpretation of these findings strongly suggested that One Tam added value in the area of **scale** over the four-year period. The two social network maps on the next page illustrate that One Tam impacted **scale** by demonstrating progress towards the following indicator: *increase in collaborative’s importance in the network by expanding its level of involvement in the cohesiveness of the overall network over time*. More specifically, the figures visually show that One Tam has played an increasingly central role in network cohesion through expanding its level of involvement and outreach from its first year to its fourth year. This is measured by total degree centrality—number of reported relationships in the network survey—where larger nodes have a higher degree of centrality (i.e., higher levels of involvement in the cohesion of the network).



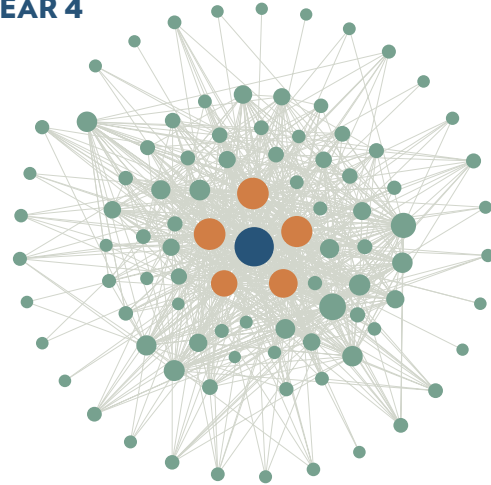
# EVALUATING PARTNERSHIP IMPACT

## EXPANSION OF ONE TAM'S ROLE IN ITS INFORMAL NETWORK

### YEAR 1



### YEAR 4



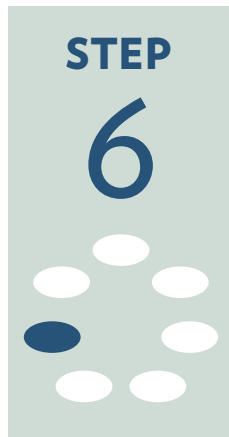
#### NETWORK KEY - ORGANIZATION TYPE

- One Tam
- Partner organization
- Community organization

**YEAR 1:** In its first year, the One Tam partner organizations were the most influential in contributing to the cohesiveness of the informal One Tam network. This is reflected by the five larger nodes which represent partner organizations.

**YEAR 4:** By the fourth year, One Tam has expanded its level of involvement and plays a more central and integral role in the cohesion of the informal network. This is reflected in the One Tam node increasing in size relative to the other nodes from the first year to the fourth year.

There are different ways to compare quantitative data to the baseline data across multiple time periods. Consulting with a professional who has the knowledge and skills to conduct these analyses and interpret findings is recommended. As for qualitative data, these findings help provide context, examples, nuance, and richness to the overall analyses—providing further validation for quantitative findings. Interviews and open-ended survey questions provide excellent opportunities for partner staff and members of stakeholder groups to reflect on progress, provide concrete examples, discuss lessons learned, and provide advice for the partnership.



### ASSESS PROGRESS & ADAPT

After interpreting the findings, partnerships should take the time to track and assess incremental progress towards the chosen impact indicators. Assessing progress towards impacts—such as those related to **trust** (across partner staff), **efficiency** (clear structure and effective operations of partnership), and **individual effectiveness and resilience** (partner staff members' feelings of morale and being supported)—has significant implications for ensuring a healthy partnership.

More specifically, if there is a decrease in one of these indicators, partnerships will want to capitalize on this opportunity to understand why the decrease occurred and then course correct. For example, there could be feelings of inequity, workload and pace expectations that are misaligned across all partners, or inefficiencies in how information is being disseminated. Take advantage of this opportunity to have open, candid conversations around what **is** and **is not** working for the various partners and adjust accordingly—these actions promote a culture of continuous improvement and position a partnership for success. One of the important benefits of conducting evaluations is that the process helps to depersonalize information and provides a safe container for discussions that might not happen otherwise. Having data and findings for partners to discuss can increase openness and the motivation to address challenges in a collaborative fashion.

Sharing incremental progress with partners and community stakeholders can promote continued or increased engagement and investment. Similarly, sharing these results with funders and donors can bolster fundraising efforts.

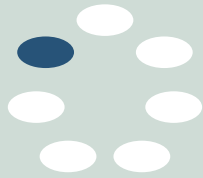
It is important to keep in mind that generating, scaling up, and sustaining impact is a non-linear process resulting from long-term, ongoing investments. As such, it is expected that partnerships will make more progress towards certain impacts and less progress (if any) towards other impacts. Being patient and celebrating small victories is essential throughout this process.

Take advantage of this opportunity to have open, candid conversations around what **is** and **is not** working for the various partners and adjust accordingly—these actions promote a culture of continuous improvement and position a partnership for success.

Sharing incremental progress with partners and community stakeholders can promote continued or increased engagement and investment.

### STEP

# 7



Demonstrating and communicating both short-term (e.g., 3–5 years) and longer-term (e.g., 6–10 years) impact can significantly bolster efforts related to fundraising, partner commitment, and community engagement.

## EVALUATE IMPACTS

In the last step of the evaluation process, a final qualitative and/or quantitative analysis should be conducted to evaluate what changes happened over the chosen evaluation timeframe. Partners should analyze findings as they relate to the relevant impact indicators, spend time digesting and reflecting upon them, and share evidence of impact with others. Demonstrating and communicating both short-term (e.g., 3–5 years) and longer-term (e.g., 6–10 years) impact can significantly bolster efforts related to fundraising, partner commitment, and community engagement.

A partnership should spend considerable time reflecting on the larger “lessons learned” and integrating those lessons in an effort to continually adapt, optimize partnership health, and generate, scale up, and sustain partnership impact. Make time to acknowledge and celebrate the work and impacts of all partnership participants. The partners will also want to think about the next evaluation cycle and which impacts will be most critical to scale up and invest in. A question to contemplate is: *What are potential impacts of your partnership that were not previously envisioned but are conceivable now?* It is possible that new impacts will emerge—expanding beyond the **11 Partnership Impacts**.



COURTESY ONE TAM

# FINAL CONSIDERATIONS

Find cost-effective ways to acquire research expertise by leveraging partner staff or finding graduate students at a local university. If your partnership is requesting funding for a long-term project or planning process, include impact evaluations in the scope of your funding request.

When it comes to adopting partnership impact evaluation as an ongoing practice, a sector-wide paradigm shift is needed. Because partnership impact evaluation is a newly emerging practice in the social sector field at large, your partnership will likely need time to integrate it into your partnership's culture. If impact evaluation is new to your partnership, it is essential to have champions of the value and importance of undertaking an evaluative process, and what that process will yield within each partner organization. In addition, partner staff and external stakeholders will need to commit to contributing to these ongoing efforts by agreeing to complete surveys or take the time to be interviewed.

Another important ingredient is integrating impact evaluation into existing planning processes. Find cost-effective ways to acquire research expertise by leveraging partner staff or finding graduate students at a local university. If your partnership is requesting funding for a long-term project or planning process, include impact evaluation in the scope of your funding request.

If this is the first evaluation cycle for your partnership, it is recommended that it should not commence until the partnership has a clear overarching purpose, vision, and agreed-upon, high-level goals. Partnerships moving at a slower pace might not be ready to proceed through an entire evaluation cycle; however, conducting Steps 1 and 2 alone can be highly transformative and can lay critical groundwork for determining an approach to conducting Steps 3–7 that will work within your budget and meet your most important needs.

The 7-step evaluation process can be applied to any long-term, sustaining partnership; however, conceptualizing impacts and determining impact indicators and ways to measure them (Steps 1–3) will and should vary for every partnership based upon the partnership's unique purpose, lifecycle phase, available resources, and type and scale of its desired impacts over a chosen timeframe.



## FINAL CONSIDERATIONS

Remember that the **7 Steps of Partnership Impact Evaluation** described in this guide are scalable.

There is no one-size-fits-all in the world of partnerships; as such it is impractical to assert that every partnership should meet a certain threshold every year or attempt to universally deem a certain threshold as being an indicator of “success.” What is most important is that partners remember that the **7 Steps of Partnership Impact Evaluation** described in this guide are scalable and that partners jointly decide what types of impact they want to work towards during a specified evaluation timeframe.

As discussed earlier, evaluating partnership impact is a critical component of scaling up, sustaining, and optimizing impact. Shared measurement enables partners to align their collaborative efforts and hold each other accountable in order to actualize a shared vision. While impact evaluation requires additional time and resources, these investments will prove invaluable by enabling your partnership to forecast, capture, and assess its impact and then effectively communicate those impacts to partners, community stakeholders, and funders and donors.

If your partnership has questions about the partnership impact evaluation process, please contact the authors.



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## APPENDIX A

# PARTNERSHIP IMPACT ROADMAP

**INSTRUCTIONS:** Start with the *Outcome Impact* questions at the top and work down to the *Operational Impact* questions. Conclude with the *Foundational Impact* questions.

## OUTCOME IMPACT QUESTIONS

1. Which *outcome impacts* will help us best advance our partnership’s mission and purpose?
2. What will these *outcome impacts* “add up to” in the short-term (1–5 years)? (e.g., improved crisis preparedness, more cost-effective land management, enhanced public access)
3. What will these *outcome impacts* “add up to” in the long-term (6–10 years)? (e.g., improved ecosystem health, enhanced climate resilience, improved habitat connectivity)
4. What is the intended scope, scale, and duration of each outcome impact we want to generate?
5. What is the probability of these outcomes happening without our collaboration? (To what degree is our collaboration necessary in order to achieve these outcomes?)
6. What are the risks of us not achieving these desired outcomes?
7. How prepared are we to achieve these outcomes?
8. What are the indicators will we use to measure and evaluate our progress towards each *outcome impact*? (e.g., becoming more effective in implementing cross-boundary management actions, increasing ability to advance community education and stewardship across the landscape)

## OUTCOME IMPACTS

EFFICIENCY	SCALE	INDIVIDUAL EFFECTIVENESS & RESILIENCE	COLLABORATIVE CULTURE	EXPANDED CONNECTIVITY
Ensuring effective and efficient functioning in order to adapt to changing needs	Engaging in joint decision making, planning, and implementing projects and programs to advance a collective vision that transcends organizational boundaries	Enhancing partnership members’ work morale and confidence to perform respective job duties through peer connections and professional development opportunities	Influencing partner organizations and local community members to more deeply value and integrate collaborative practices	Serving as a multi-partisan resource by connecting stakeholders at local, regional, and/or national levels

The above questions are informed by the five dimensions for understanding impact used by the Impact Management Project. <https://impactmanagementproject.com/impact-management/what-is-impact/>

## APPENDIX A

# PARTNERSHIP IMPACT ROADMAP

## OPERATIONAL IMPACT QUESTIONS

1. Which *operational impacts* will help us best advance our partnership's mission and purpose?
2. What are the essential attitudes, behaviors, systems, structures, resources, approaches, and processes necessary to generate these *operational impacts*? ...to scale up these *operational impacts*? ...to sustain these *operational impacts*?
3. What are the indicators we will use to measure and evaluate our progress towards each *operational impact*? (e.g., increased innovative ideas generation and implementation, increased sharing of resources, increased understanding of partner cultures)

## OPERATIONAL IMPACTS

CREATIVITY	RESOURCE SHARING	ADDED CAPACITY	PARTNER CULTURE AWARENESS
Creating and implementing innovative and inventive programs, projects, and solutions	Sharing human capital, knowledge, data, and physical infrastructure	Increasing partnership staff capacity, leveraging partners' existing funds, generating new funding sources, and leveraging partners' expertise	Understanding, valuing, and leveraging partners' respective cultural differences for mutual benefit

## FOUNDATIONAL IMPACT QUESTIONS

1. Who do we most need to be active participants in our partnership?
2. Who is part of our partnership's broader social network?
3. How do we intend to generate, scale up, and sustain **connectivity** and **trust** at the individual, organizational, and community levels over time?
4. What are the indicators we will use to measure and evaluate our progress towards each *foundational impact*? (e.g., increased frequency of interactions, increased levels of collaboration, increased levels of perceived trust)

## FOUNDATIONAL IMPACTS

CONNECTIVITY	TRUST
Increasing the quality and quantity of connections for partnership members, partner organizations, and community stakeholder groups	Increasing trust between partnership members, partner organizations, and community stakeholder groups



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## APPENDIX B: EXAMPLES OF IMPACT INDICATORS AND SURVEY QUESTIONS

### OUTCOME IMPACT: INDIVIDUAL EFFECTIVENESS & RESILIENCE

#### INDIVIDUAL EFFECTIVENESS & RESILIENCE INDICATORS

- Increase in partner staffs' work morale over time.
- Increased confidence in their abilities to effectively perform respective job duties over time.

#### INDIVIDUAL EFFECTIVENESS & RESILIENCE SURVEY QUESTIONS

On a scale of 1-5, please indicate your level of agreement with the following statements (1=strongly disagree and 5=strongly agree).

*As a result of participating in [Partnership Name],*

- 1. My job performance is enhanced.*
- 2. I have increased credibility with people from other organizations.*
- 3. I am more confident in my ability to do my job.*
- 4. I am more satisfied with my job.*

## APPENDIX B: EXAMPLES OF IMPACT INDICATORS AND SURVEY QUESTIONS

### OPERATIONAL IMPACT: RESOURCE SHARING

#### RESOURCE SHARING INDICATORS

- Increase in resource sharing (e.g., volunteers, data, equipment) each partner brings to the collaborative over time

#### RESOURCE SHARING QUESTIONS

To date, how often does your organization make use of other collaborative partners' resources?

**1. For each resource, indicate whether it is Daily, Weekly, Monthly, Quarterly, Bi-Annually, Annually, Never, Don't Know**

- Partner staff
- Partner volunteers
- Data and information
- Equipment
- Indoor space (e.g., offices)
- Outdoor space (e.g., parking lots)
- Knowledge/expertise
- Skill sets

**2. On a scale of 1-5, please indicate how effective [Partnership Name] is in sharing the following resources (1=not effective at all and 5=extremely effective).**

- Partner staff
- Partner volunteers
- Data and information
- Equipment
- Indoor space (e.g., offices)
- Outdoor space (e.g., parking lots)
- Knowledge/expertise
- Skill sets

**3. Please describe two examples of resource sharing here.**

## APPENDIX B: EXAMPLES OF IMPACT INDICATORS AND SURVEY QUESTIONS

### FOUNDATIONAL IMPACT: TRUST

#### TRUST INDICATORS

- Increased levels of perceived trust among those within the network over time.
- Increased levels of perceived trust among partners over time.

#### TRUST SURVEY QUESTIONS FOR THOSE IN THE NETWORK

From the list, select all of the organizations with which your organization has a relationship in association with the [Partnership Name]. Note: create a list of all stakeholder groups, such as environmental, recreation, and volunteer groups, other community groups, and schools.

*On a scale of 1-5, please indicate your level of agreement with the following statements<sup>5</sup> for each of the organizations selected (1=strongly disagree and 5=strongly agree).*

1. *This organization is reliable (i.e., follows through on commitments).*
2. *This organization is dedicated to the mission of [Partnership's Name].*
3. *This organization is open to discussion (i.e., willing to engage in frank, open, and civil discussion).*

#### TRUST SURVEY QUESTIONS REGARDING PARTNERS AND PARTNER STAFF

*On a scale of 1-5, please indicate your level of agreement with the following statements (1=strongly disagree and 5=strongly agree).*

1. *I trust the partners.*
2. *I trust the staff representing the partners.*
3. *The partners are committed to the success of [Partnership Name].*
4. *The partner staff are committed to the success of [Partnership Name].*

<sup>5</sup> These questions are adapted from an article authored by Varda, Chandra, Stern & Lurie (2008).

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An aerial photograph of a large, forested mountain peak. The forest is dense and green, covering the entire slope. At the very top of the peak, there is a small, white, rectangular structure, possibly a cabin or a viewing platform. The sky is a pale, hazy blue, suggesting a clear day. The overall scene is serene and natural.

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For more information, visit  
[OneTam.org](https://www.onetam.org)