

Tools to assist in evaluation of municipal public health and wellbeing plans

Module 4 of 7: Evaluating with partners



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This resource is available electronically on the internet at:
<http://www.health.vic.gov.au/regions/eastern/initiatives.htm>

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Introduction

The purpose of this module is to assist in developing external partnerships that will support a Municipal Public Health and Wellbeing Plan (MPHWP) evaluation strategy.

The module is one of a suite of seven resources entitled **Tools to assist in the evaluation of MPHWP**s designed to provide evaluation support and guidance to practitioners involved in the planning, implementation and evaluation of MPHWP as required under the *Public Health and Wellbeing Act 2008*. See **Module 1: MPHWP evaluation at a glance** for more information.

The following table describes each module and its use against MPHWP evaluation actions¹.

Table 1: Alignment of Tools to assist in evaluation of MPHWP modules with evaluation actions

MPHWP evaluation action	Tools to assist in evaluation of MPHWP modules
<p>Understanding MPHWP evaluation</p>	<p>Use Module 1: MPHWP evaluation at a glance to:</p> <ul style="list-style-type: none"> understand the legislative requirements for MPHWP evaluation under the <i>Victorian Public Health and Wellbeing Act 2008</i>. understand the multilayered approach applied to MPHWP evaluation applied in this resource.
<p>Develop an MPHWP evaluation strategy</p>	<p>Use Module 2: Building an MPHWP evaluation strategy to:</p> <ul style="list-style-type: none"> establish the governance mechanisms for MPHWP evaluation clarify how each evaluation question will be approached and what will be evaluated establish systems to coordinate evaluation elements design summary MPHWP evaluation reporting
<p>Determine role of internal partners, external partners and the community</p>	<p>Use Module 3: Achieving a culture of evaluation to develop internal relationships that promote MPHWP evaluation across council</p> <p>Use Module 4: Evaluating with partners to work with external partners to include assisting in the design and conduct of MPHWP evaluation in their MPHWP roles</p> <p>Use Module 5: Engaging the community in evaluation to engage the community more effectively in the design and conduct of MPHWP evaluation</p>
<p>Design systems to support the evaluation strategy</p>	<p>Use Module 6: Making evaluation sustainable to develop approaches to the design and conduct of MPHWP evaluation that are sustainable</p>
<p>Conduct MPHWP evaluation</p>	<p>Use Module 1 to guide how answers to evaluation questions will be brought together, analysed and reported</p> <p>Use Modules 3, 4, 5 to guide the way in which internal partners, external partners and the community are engaged in the conduct of evaluation</p> <p>Use Module 7: Designing and conducting an evaluation to design and conduct an evaluation of selected MPHWP topics or to support someone else to do so</p>

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¹ Victorian Department of Health, 2013, *Guide to municipal public health planning*, DH, Melbourne.

PART 1: The essentials of evaluating with partners

Harnessing the knowledge, experience and expertise of diverse organisations and sectors in the planning, implementation and evaluation MPHWP not only strengthens the MPHWP but allows councils to align goals and work more closely with partners to innovate and improve the health and wellbeing of their communities.

This reality is recognised in the *Public Health and Wellbeing Act 2008 Section 26 (d)* which requires the MPHWP to:

... specify how the Council will work in partnership with the Department and other agencies undertaking public health initiatives, projects and programs to accomplish the goals and strategies identified in the public health and wellbeing plan.

Working in partnership creates challenges and opportunities for MPHWP evaluation. A shared responsibility for achieving MPHWP goals can make it more difficult to clarify what worked and what didn't and to attribute success or otherwise to a particular partner. This is only a problem where the performance of individual partners is being assessed.

On the other hand a partnership approach to MPHWP evaluation expand the opportunity to work with partners on developing the overall MPHWP strategy, collaborating on specific evaluations and or sharing the findings of other relevant evaluations conducted by individual partners. It also means being able to share the expense of what can be costly and time consuming activity.

1.1 Shared purpose

Recognising the interdependence of organisations and sectors in the health and wellbeing system in delivering improvements to the local community is central not only to the planning and implementation of your MPHWP, but also to its evaluation.

Building a strong, resilient approach to evaluating with MPHWP partners brings a number of benefits. Partner involvement can be a positive influence for accountability, creating more certainty that the impacts and outcomes of the MPHWP will be achieved. It can also broaden the scope for shared learning so that together, you can strategically evaluate the results of your joint efforts, as well as evaluate the impacts from the contribution of individual programs, projects or initiatives targeted to more specific aspects of the MPHWP.

The discipline of evaluating with partners begins in the planning stage of your MPHWP. Planning together helps ensure that you enjoy shared understanding of the Plan's goals and objectives, what is to be achieved, who is involved and what is expected. This includes ensuring you have a shared understanding of the benefits of evaluating the MPHWP, the vital role partners can play, and what is expected of them given their indispensable role in its delivery.

The key to successful evaluation of your MPHWP is to increase partner participation in MPHWP evaluation as a whole, as well as in evaluations of critical MPHWP components. In this way, you will leverage resources, skills, competencies, technology and networks which together have the potential to increase the quality of your MPHWP and improve the health and wellbeing status of the community.

1.2 Benefits of working together

Partnering with stakeholders helps to increase your evaluation capacity. Your own perspective is necessarily limited by your organisational context, evaluation experience and the resources and skills available to you. With evaluation partners, you can share knowledge and understanding, build relationships, access skills and experience, and gain a greater understanding of what is being done in the community.

Part of the power in evaluating with partners is getting input from people with diverse perspectives. A collaborative group of stakeholders engaged in MPHWP evaluation will better understand, be sensitive to, and shed greater light on, the cultural context of programs, projects and initiatives. This diversity provides different insights, different political and social perspectives and asks different questions in the evaluation process. This provides new opportunities for learning and the ability to better respond to the disparate needs of population groups in different settings.

There is also diversity in the size and interests of partners and their relationship with you. Prospective partners might include:

- ❖ Funders
- ❖ Providers
- ❖ Peers
- ❖ Not-for-profit agencies
- ❖ Government agencies
- ❖ Community and Women's Health Services
- ❖ Primary Health Partnerships
- ❖ Medicare Locals
- ❖ Academic Institutions
- ❖ Local businesses and business organisations
- ❖ Community groups.

By exploring the various expectations of stakeholders, you will be better able to clarify the purpose of your evaluation strategy and be better placed to implement it successfully. It will require skill in planning for involvement of partners, open communication, joint decision-making and commitment to agreed processes and results.

1.3 Building capacity

As evaluation partnerships develop, they build the capacity of council and partners to participate at the strategic and program level, and to change their participation as priorities in the health and wellbeing service system evolve and change. New evidence, new policy delivered by different levels of government, and changes to funding can all change the role and participation of partners.

Strong, diverse and dynamic evaluation partnerships built on trust, commitment, and willingness to share both power and 'the territory', lay the foundations for sustainable change. Organisations are linked beyond their immediate area to the wider health and wellbeing delivery system underwriting greater ownership of the MPHWP results. Partners enjoy the benefits from their investment of effort, as does the service system overall.

Partnerships also lead to greater efficiencies in evaluation – shared effort, shared resources and shared purpose reduce duplication and fragmented effort. High quality partnerships share resources and time and draw on one another's strengths. They have the potential to attract wider resources that in turn build a stronger evidence base, improved community health and wellbeing and a more sustainable system.

PART 2: Working with partners in evaluation

2.1 Partner roles in MPHWP evaluation

The way in which your council works with partners in MPHWP evaluation is likely to be part of a broader partnership approach to MPHWP development and implementation. That is, just as evaluation is intrinsically embedded in the MPHWP planning cycle, so too, working with partners in evaluation will make better sense when it is considered in the wider context of partnership engagement in the MPHWP.

This means that you will most likely be working with partners on MPHWP evaluation with whom you have already established a planning relationship.

You might have involved some key partners in building your MPHWP Evaluation Strategy and selecting evaluation topics - see **Module 2: Building an MPHWP Evaluation Strategy**.

You might also work with these and other partners to pursue selected evaluations - see **Module 7: Designing and Conducting an Evaluation**.

The challenge for strengthening the role of partners in MPHWP evaluation is to be clear about the partnership focus and to maintain a high performance partnership that supports the critical function of evaluation in learning and development.

Use the **Partnership mapping tool** to assess the status of your partnerships so that you can ensure the evaluation relationships are explicit and actively managed. See **page 13**.

2.2 Partnership focus

The goal of partnerships is to achieve more value from your combined effort than you otherwise would acting alone. However, partnerships are neither easy nor a panacea. They can be time-consuming, difficult to establish and demanding to maintain. They equally can be particularly rewarding.

Collaboration is a powerful way to accomplish together what no single organisation can on its own. However, not all partnerships are built on collaboration – you will need to consider the most appropriate relationship with your partners to achieve effective planning, implementation and evaluation of your MPHWP.

A useful way to view partnerships is as a continuum from networking to collaboration²:

- Networking** Involves the exchange of information for mutual benefit. This requires little time and trust between partners. For example, youth services within a local government area might meet monthly to provide an update on their work and discuss issues that affect young people.
- Coordinating** Involves exchanging information and altering activities for a common purpose. For example, the council and community youth services might meet and plan a coordinated campaign to lobby for more youth-specific local services.
- Cooperating** Involves exchanging information, altering activities and sharing resources. It requires a significant amount of time, high level trust between partners and sharing the turf' between agencies. For example, a group of community youth services might pool some resources with council to run a 'Diversity Week' as a way of combating violence and discrimination.
- Collaborating** In addition to the other activities described, collaboration includes enhancing the capacity of the other partner for mutual benefit and a common purpose. Collaborating requires the partner to give up a part of their turf to another agency to create a better or more seamless service system. For example, council and the group of community youth services might provide their funds to a single youth agency to establish a full-time position to manage 'Diversity Week' and to provide professional development for youth workers.

² VicHealth 2008, *The partnerships analysis tool*. Continuum adapted from Himmelman A 2001, 'on coalitions and the transformation of power relations: Collaborative betterment and collaborative empowerment' *American Journal of Community Psychology*, vol. 29, no. 2

2.3 Successful partnerships

There has been a lot of research into factors that contribute to partnership success. Several themes emerge from this research that can usefully be applied to achieve successful partnering in the evaluation of your MPHWP:

- ❖ Purpose
- ❖ Culture and Communication
- ❖ Professional Approach
- ❖ Learning and Innovation.

Purpose

Establish a common vision and purpose from the outset – engage your partners in the development of your MPHWP evaluation strategy. This will help to ensure that differing perspectives are understood, and the groundwork is laid for mutual gain. Focus on achieving mutual benefit so that partners meet their own objectives as well as the common goals.

Also ensure that you have similar notions about the purpose of the partnership itself. Where does it sit on the spectrum – Networking? Coordinating? Cooperating? Collaborating? These different ways of working together have varying levels of intensity. Knowing what you want to accomplish will determine whether you need to cooperate, coordinate or collaborate.

Skilful leadership will also be needed to guide the delivery of the evaluation strategy and associated evaluation plans. Match leadership to the purpose and nature of the partnership and ensure partners are engaged in a sustained and committed way.

Culture and Communication

Create the conditions for trust, openness, transparency, clear communication and respect for differences in approach, competence, timeframes and objectives. These shared values underpin open and effective communication, both its frequency and the level of informal communication that complements the agreed formal processes of the partnership.

Practice inclusive decision-making so that the partnership works as a team on critical decisions. Build flexibility and adaptability into working processes that focus on the achievement of results and accommodate differences.

Professional Approach

In addition to skilful leadership, put in place management practices and resources to achieve the shared goals. Establish operating guidelines through terms of reference or a memorandum of understanding. Include your purpose, roles and contributions, any policies that might apply, and some basic ground rules for participation, decision-making, communication, conflict, meetings and so on. Establish governance structures that are 'fit for purpose' – that are as simple and efficient as possible and minimise the impact and demands on partners.

Apply rigour and discipline to achieving targets and deliverables in line with the evaluation strategy and plans.

Learning and Innovation

Create opportunities to work and learn together. Engage partners for learning and performance improvement and facilitate their participation and sense of involvement in building better health and wellbeing status in the community.

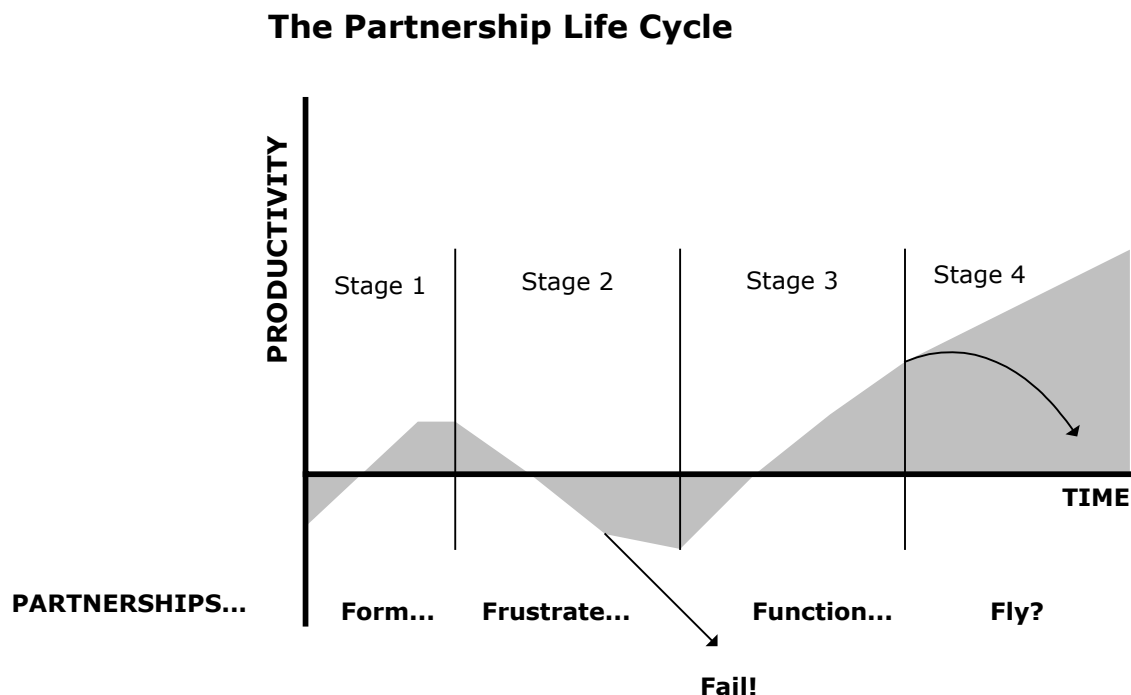
Leverage the full value of the partnership through creative problem-solving and sharing of new learning. Invest in the development of skills, knowledge and competence of all partners that takes evaluation beyond reporting and accountability to 'evaluation as learning'. Encourage ideas and experimentation; be open to learning from all kinds of sources; and feed this learning back into the evaluation strategy and processes.

2.4 Partnership lifecycle

Forging successful partnerships takes purposeful effort – creating conducive conditions, and facilitating and enabling its success.

You can take a strategic view by understanding the evolution of your partnerships. The Partnership Life Cycle³ - Form, Frustrate, Function, Fly/Fail – provides you with a framework to do that.

Figure 1: The Partnership Lifecycle



The Partnership Lifecycle provides insight into the stage of partnership you might be experiencing and can assist in determining what you might do to address issues of concern or aspects of the relationship that might not be functioning as effectively as you would like.

Formal analysis of your partnership can be undertaken using *The Partnership Analysis Tool* produced by VicHealth to facilitate partnerships across sectors.⁴ It is a resource designed to:

- ❖ Assist organisations to develop a clearer understanding of the range of purposes of collaborations.
- ❖ Reflect on partnerships that are already established.
- ❖ Focus on ways to strengthen both existing and new partnerships.

The tool features three activities: *Assessing the purpose of the partnership*; *A map of the partnership*; and *A checklist for partnership in health promotion*. The checklist is a comprehensive tool for providing feedback on the current status of the partnership and to suggest areas that need further support and work. Seven main headings are

³ Educe Ltd & GFA Consulting as part of an Education and Training Development Agenda project for the Department for Education and Employment.

⁴ VicHealth, 2008

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supported by statements which can be rated on a scale from strongly disagree to strongly agree. Your aggregate score allows you to assess the current state of your collaboration.

The seven aspects assessed are:

1. Determining the need for the partnership
2. Choosing partners
3. Making sure partnerships work
4. Planning collaborative action
5. Implementing collaborative action
6. Minimising the barriers to partnerships
7. Reflecting on and continuing the partnership.

The Partnerships Analysis Tool can be found at:

<http://www.vichealth.vic.gov.au/Publications/VicHealth-General-Publications/Partnerships-Analysis-Tool.aspx>

Once you are clear on the state of your partnership, the Partnership Lifecycle provides a useful framework for guiding action to establish and maintain partnership performance - see Table 2: Responses to partnership cycle stages opposite.

Table 2: Responses to partnership cycle stages

If you're at this stage....	consider...
1. Forming	<ul style="list-style-type: none"> ❖ Create opportunities for people to get to know each other ❖ Encourage partners to focus on a common vision and the difference you want to make together ❖ Define tasks and tangible aims ❖ Gently shepherd the process of building the partnership agenda ❖ Consider neutral meeting ground
2. Frustration	<ul style="list-style-type: none"> ❖ Revisit the common ground – allow time to redefine issues, purpose etc. ❖ Maximise opportunities for practical involvement ❖ Implement actions which demonstrate progress ('quick wins') ❖ Encourage open expression and constructive disagreement ❖ Clarify benefits to individual partners ❖ Promote mutual appreciation of what other can contribute ❖ Fix the problem, not the blame
3. Functioning	<ul style="list-style-type: none"> ❖ Agree clear objectives, milestones, responsibilities, success measures ❖ Establish principles/protocols for the partnership – where is it on the spectrum from networking to collaboration? ❖ Encourage shared leadership and accountability ❖ Develop common methods and quality standards ❖ Seek learning consciously through cross-partner project team, joint training and reviewing activities
4. Flying	<ul style="list-style-type: none"> ❖ Anticipate future challenges and build partner capacity to respond ❖ Take stock of how well the group is performing ❖ Keep working at communications ❖ Avoid any unnecessary partnership work ❖ Ask: does the partnership still serve its purpose? ❖ Ensure that all partners are getting the benefits they expect ❖ Continue to celebrate success
5. Failing	<ul style="list-style-type: none"> ❖ Wind up the partnership if it fails to provide sufficient benefits and results ❖ Go back to the advice offered for Stage 3 - Frustration

Adapted from Educe Ltd & GFA Consulting 2002, 5 *Vital Lessons*

PART 3: Further resources

The following is a list of useful partnership resources in addition to those cited in the body of the module. All web based material was last accessed 20 September 2013.

Educe Ltd & GFA Consulting, 2001, *Five Vital Lessons: Successful Partnerships with Business*, http://fivevital.educe.co.uk/index_1.htm click on Toolkit then Partnership Life Cycle. Browse site for other useful partnership tools

Harvard Family Research Project, 2005, *Evaluating Partnerships: Seven Success Factors*, The Evaluation Exchange, Vol. XI, Number 1, Spring 2005

Heart Disease & Stroke Prevention undated, *Fundamentals of Evaluating Partnerships*, Centres for Disease Control and Prevention, Atlanta, Georgia

Lukas C & Andrews R undated, *Four Keys to Collaboration Success*, Fieldstone Alliance, http://www.fieldstonealliance.org/client/articles/Article-4_Key_Collab_Success.cfm,

Office of the Chief Researcher, 2002, *Partnership Working: Key Issues around Evaluation*, Scottish Executive Social Research, Edinburgh, Scotland

Pope, J & Jolly, P, 2008, *Working in Partnership: Practical advice for running effective partnerships*, Department of Planning and Community Development. Melbourne, Australia. http://www.maribyrnong.vic.gov.au/Files/Working_in_Partnership_PDF.pdf (accessed 22 October 2012)

Rieker, PP, 2011, *Partnership Evaluation: Guidebook and Resources*, Centers for Disease Control and Prevention, Division of Nutrition, Physical Activity, and Obesity, Atlanta, Georgia

VLGA Community engagement webpage and resources
www.vlga.org.au/Resources/Consultation_and_Engagement.aspx

VicHealth 2008, *The Partnerships Analysis Tool*, Victorian Health Promotion Foundation, Melbourne, Victoria, Australia <http://www.vichealth.vic.gov.au/Publications/VicHealth-General-Publications/Partnerships-Analysis-Tool.aspx>

Victorian Council of Social Services provides a resource section offering a series of four online *Partnering in Practice* guides to assist with developing and sustaining partnerships. <http://vcoss.org.au/strong-sector/partnerships-decd/>

Victorian Department of Health, *Primary Care Partnerships: Partnership Development*, <http://www.health.vic.gov.au/pcps/partnerships/index.htm>

Partnership mapping tool

This tool can be used to identify your MPHWP evaluation partners and their contribution to MPHWP evaluation. It can be revisited from time to time to consider how it is performing and whether remedial action is necessary.

Column 1: List all partners who are to be actively engaged in MPHWP evaluation. This will include key partners involved in broader MPHWP evaluation strategy building (See Module 1) as well as those engaged in selected evaluations (see Module 2).

Column 2: Record how each partner will contribute to MPHWP evaluation.

Column 3: Record the nature of the partnership focus (See **page 5** above).

Column 4: Use a formal review process such as the *VicHealth Partnership Analysis Tool* or other form of reflection to consider its current status in the Partnership Cycle. This might be focussed on the partnership in general or specifically to MPHWP evaluation.

Column 5: Consider partnership strengths and challenges.

Column 6: Determine action based on current status and strengths and challenges analysis (See *Table 1: Responses to partnership cycle stages page 9*).

Example of how tool might be completed for one partner

PARTNERSHIP	CONTRIBUTION TO MPHWP EVALUATION STRATEGY	NETWORKING? COORDINATION? COOPERATION? COLLABORATION?	CURRENT STATUS IN LIFECYCLE	STRENGTHS & CHALLENGES	ACTION
XYZ PCP	On advisory group Conducting impact evaluation on program abc	Coordination at this stage; working towards cooperation	Functioning well	Built on personal relationships. The CEO, a strong partnership supporter, is leaving. Need to ensure partnership endures.	Develop a more systemic approach including developing a memorandum of understanding

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PARTNERSHIP	CONTRIBUTION TO MPHWP EVALUATION STRATEGY	NETWORKING? COORDINATION? COOPERATION? COLLABORATION?	CURRENT STATUS IN LIFECYCLE	STRENGTHS & CHALLENGES	ACTION

