

# Evaluating Coalitions & Partnerships

**Frances D. Butterfoss, PhD**  
**Eastern Virginia Medical School**  
**Norfolk, Virginia**

# Coalitions & Partnerships

- **Coalition:** group of individuals representing diverse organizations or constituencies who agree to work together to achieve a common goal (Feighery & Rogers, 1990)
- **Partnership:** Implies **business-like** arrangement whereby **two or more** partners agree to work toward for common goal or interest – **strategic alliance, joint venture**
- Terms often used interchangeably

# High Expectations for Performance

- **Network & share information**
- **Plan & coordinate**
- **Implement specific projects**
- **Provide technical assistance & training**
- **Advocate**

# Coalitions and Evaluation

- Each partnership is unique – developed within context of its community
- Coalition's main role is to facilitate issues & initiate projects with diverse member organizations
- To ensure that time & resources are used effectively, coalitions must evaluate what they do
- Yet, most coalitions do not routinely evaluate themselves or their programs unless mandated by funder

# **Why Evaluate Coalitions & Partnerships?**



# Why Evaluate Coalitions?

- **Builds capacity within coalition & community**  
Do partners use coalition approach or tools for other issues?
- **Determines whether objectives are achieved**  
Did coalition achieve goals?
- **Improves coalition interventions**  
*Were programs effective?*
- **Provides accountability to community, funding agencies & stakeholders**  
*Are members satisfied & contributing? Were resources used wisely?*

# Why Evaluate Coalitions?

- **Increases community awareness & support**  
*Is community aware of coalition efforts? Do they support coalition?*
- **Contributes to scientific base**  
*Does partnership approach work?*
- **Informs policy decisions**  
*Did elected officials support policies or legislation proposed by coalition?*

# Challenges of Evaluating Coalitions

- Takes time & resources - not built into coalition's process
- Each coalition is unique - Design & methods are complex & generalization difficult
- Evaluation not based on plan – 'do it yourself'
- Staff motivated to make coalition & programs 'look' good



# **Steps to Evaluating Coalitions & Partnerships**



# Step 1: Plan the Evaluation

- Engage stakeholders (professionals & lay persons)
- Establish evaluation team and resources
  - **Implementers** – initiate & monitor program
  - **Partners** - actively support program
  - **Participants** - served/affected by program
  - **Decision-makers** – make program decisions
- Obtain buy-in & commitment to evaluation

# Step 2: Describe Coalition or Program

## Stage of coalition/program

- Planning or formation
  - Implementation
  - Maintenance

## Statement of problem

- Nature & magnitude?
- Causes & trends?
- Consequences?

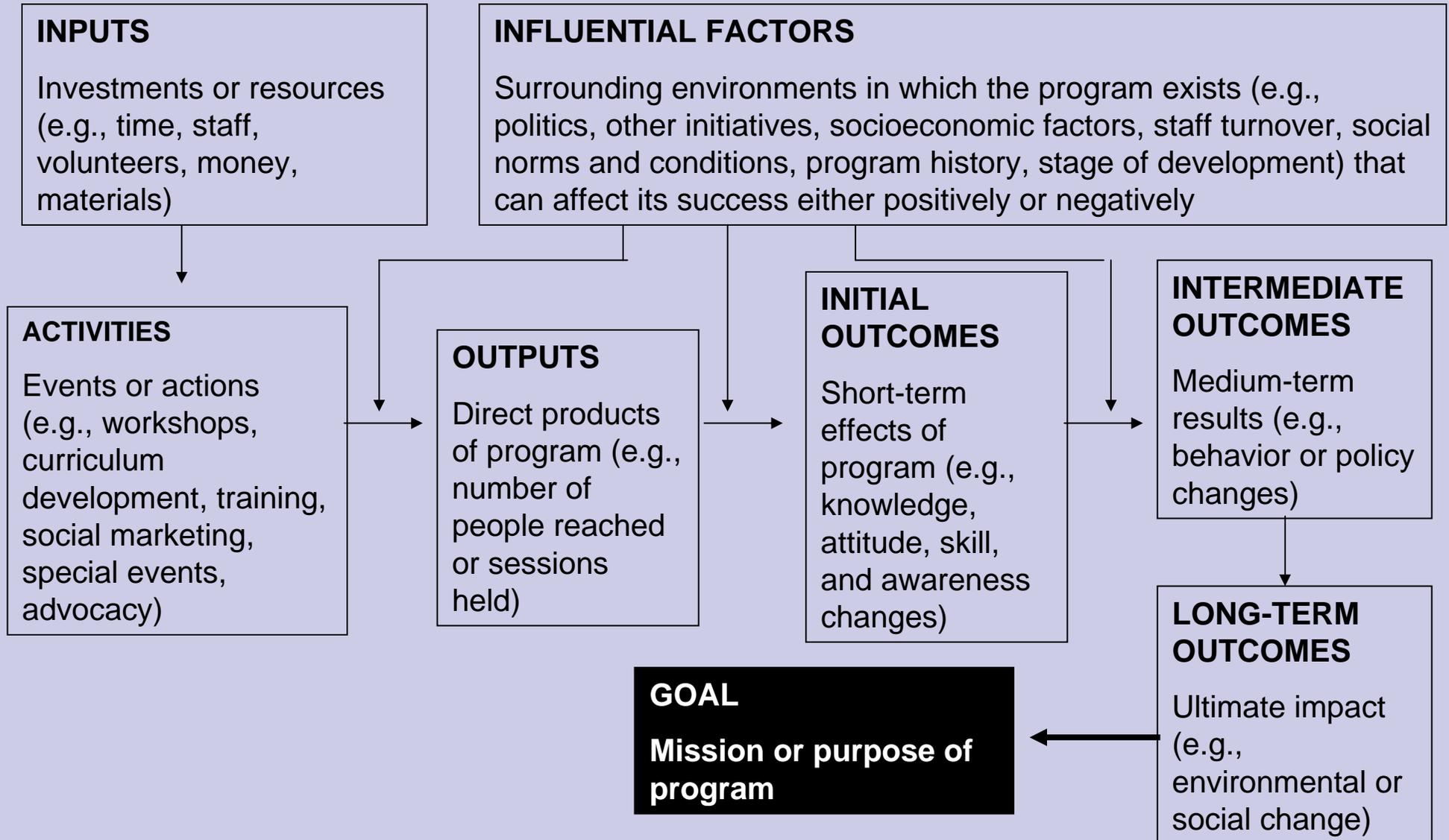
## Create logic model



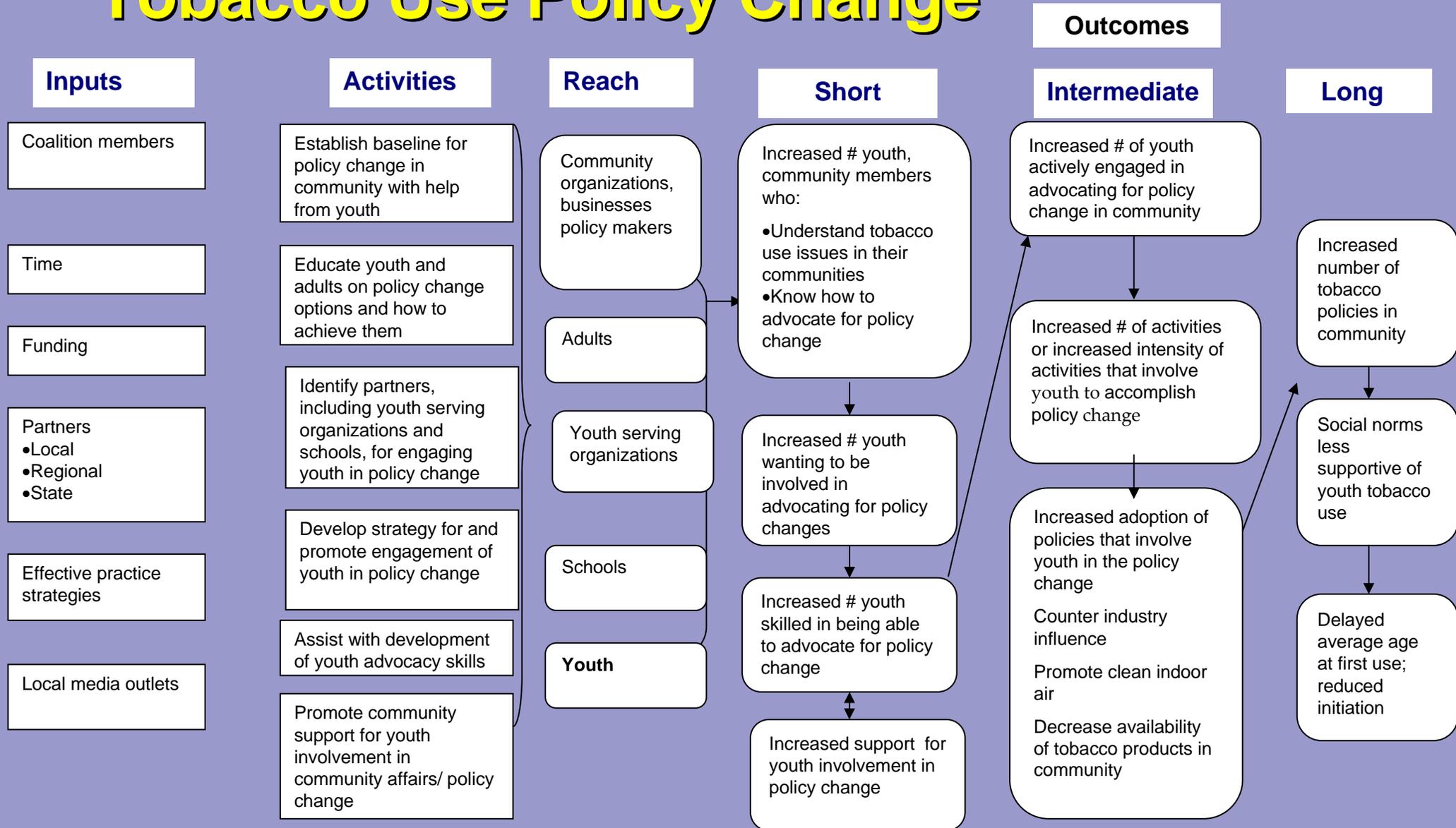
# Coalition & Program Logic Models

- **Describes core components of coalition/program**
- **Shows connection between program/coalition components & expected outcomes**
- **Includes key information about context (or influencing factors)**

# Components of a Basic Logic Model

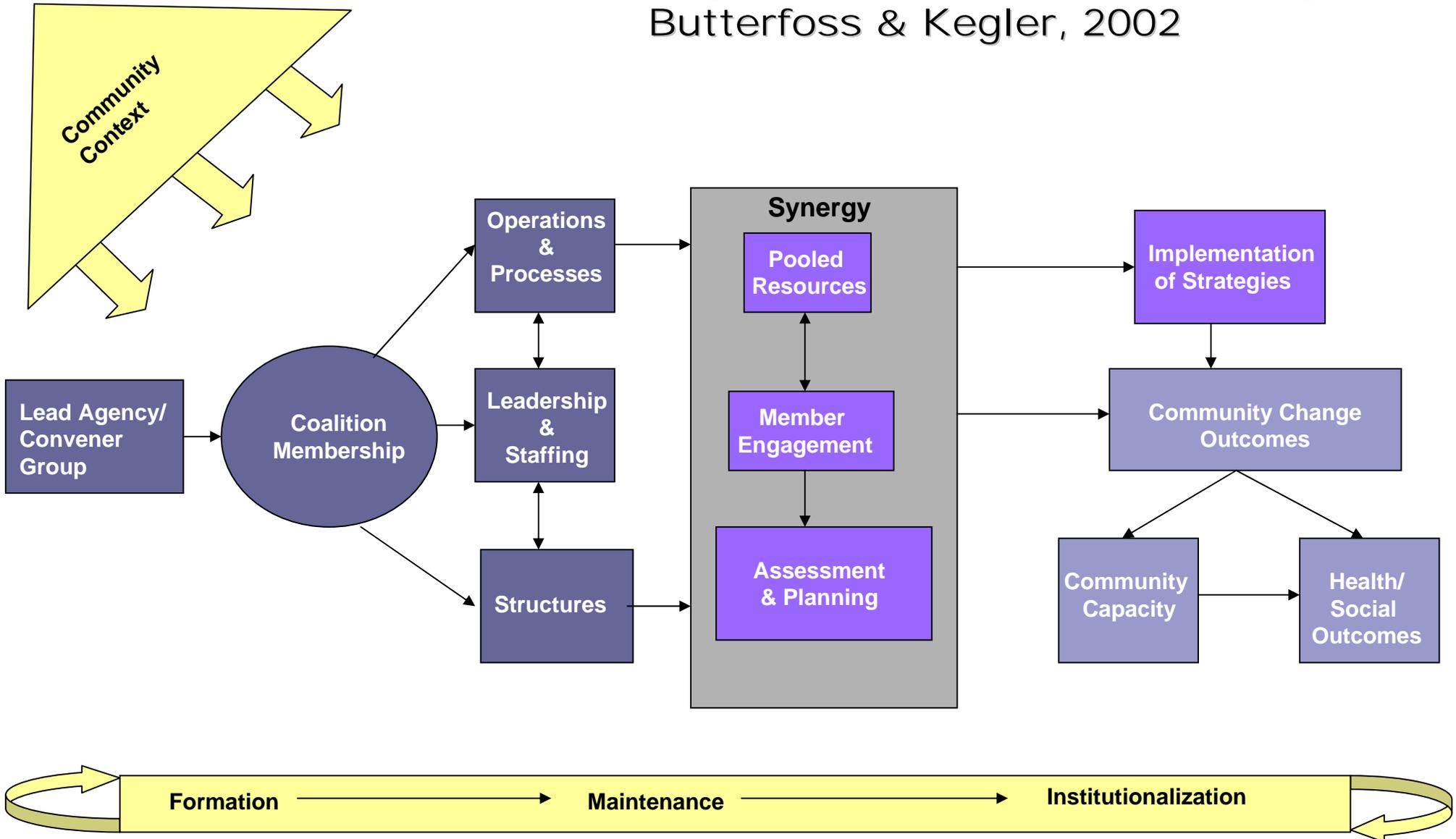


# Program Evaluation Logic Model: Tobacco Use Policy Change



# Community Coalition Action Theory

Butterfoss & Kegler, 2002



# **Step 3: Focus the Evaluation**

**Ask stakeholders what they need to know about:**

- **Coalition**
- **Programs & activities**
- **Outcomes**
- **Members & participants**
- **Coalition impact**
- **Influencing factors**



# Coalition Evaluation Questions

- Are we meeting our members' needs?
- Do our work groups function well?
- Which strategies are effective?
- Are we on track to accomplish goals & objectives?
- Are we reaching our priority audiences?
- Are we influencing policies & practices?
- Are we building community capacity?
- Could we improve? Are we making a difference?
- Are there external factors that affect our work?
- What unintended outcomes are occurring?

# Step 4: Choose Methods & Collect Data

- Use mixed methods (qualitative & quantitative) to assess parts of coalition or project
- Use well-defined, measurable, acceptable indicators
- Collect enough data to be reliable, but consider response burden
- Don't try to measure everything – Plan for use of data you collect!



# Levels of Coalition Evaluation

- **LEVEL 1:** Process - coalition effectiveness
- **LEVEL 2:** Impact - coalition programs
- **LEVEL 3:** Outcome
  - Changes in community environment, policies & practices
  - Changes in health/social status

**LEVEL 1**

**LEVEL 2**

**LEVEL 3**



# Free/Low Cost Evaluation Manuals & Websites

- ***The Community Toolbox:*** <http://www.ctb.edu>
- ***Empowerment Evaluation Website:***  
<http://www.stanford.edu/empowermentevaluation>
- ***CDC. Physical Activity Evaluation Handbook. (2002). US Dept of Health & Human Services***
- ***W.K. Kellogg Foundation. (1998). Evaluation Handbook. Battle Creek, MI***  
<http://www.wkkf.org/Pubs/Tools/Evaluation/Pub770.pdf>

# Free/Low Cost Evaluation Tools

- **Survey Monkey: \$200./yr** <http://www.surveymonkey.com/>
- **Innovation Network: Tools for evaluation plans, logic models & more** <http://www.innonet.org/index.php>
- **Online Evaluation Resource Library: Create surveys, interviews, observation guides:** <http://www.oerl.sri.com/>
- **United Way Outcome Measurement Resource Network: Downloadable or low cost (< \$50. tools & instruction)**  
<http://national.unitedway.org/outcomes/resources/>



# Instruments & Tools

- ❑ Coalition Effectiveness Inventory (CEI)
- ❑ Meeting Effectiveness Inventory (MEI)
- ❑ Teamwork surveys
- ❑ Collaboration & Inclusivity Checklists
- ❑ Member Satisfaction Surveys
- ❑ Member & Leader Interviews

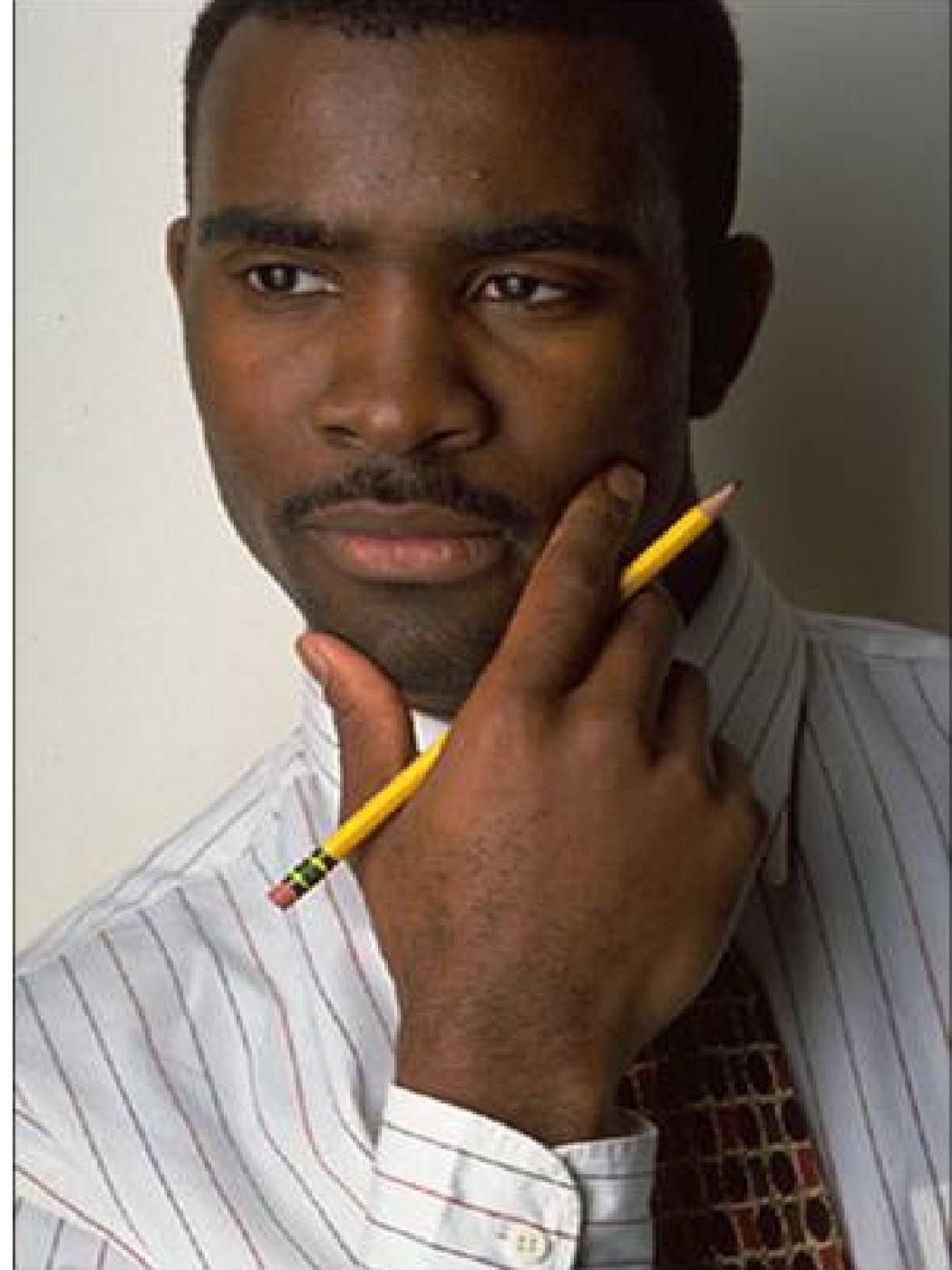
# Step 5: Analyze & Interpret Data

## ■ Analyze data

- Enter data - check for errors
- Tabulate/stratify data
- Compare & format clearly

## ■ Interpret results

- Are results as expected?
- Comparable to other programs?
- Same results from several indicators?
- Limitations of evaluation?



# Step 6: Communicate & Ensure Use of Findings



- **Summarize**: Methods, stakeholders' roles, strengths & weaknesses results (tables & graphs)
- **Recommend**: Action-oriented, relevant & useful
- **Share Results**: Media, mail, web sites, list serves, forums, newsletters

# Overcome Challenges

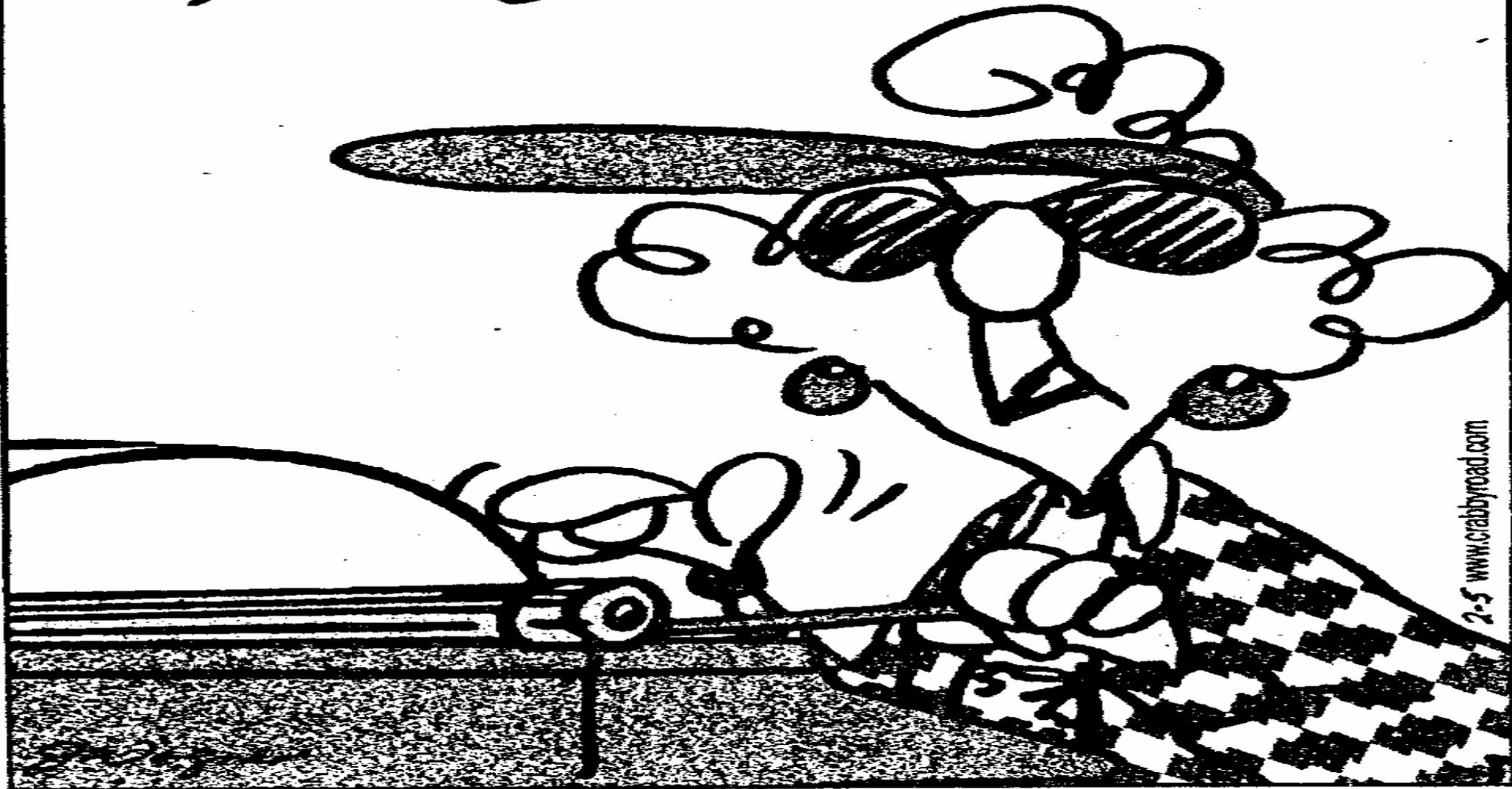
- Get training & technical assistance
- Enlist partners' help
- Begin where your partnership is
- Be realistic - evaluate “something”
- Use innovative methods
- Evaluate promising strategies
- Develop measurable outcomes at all levels



# CRABBY ROAD

©2001 Shoebox Greetings/Dist. by Universal Press Syndicate

Change is good as long  
as I don't have to do  
anything different.



# References

- *Butterfoss, FD. (2007). Coalitions and Partnerships in Community Health. San Francisco, CA: Jossey Bass.*
- *Butterfoss, FD & Francisco, VT. (2004). Evaluating community partnerships & coalitions with practitioners in mind. Evaluation to Practice Department, Health Promotion Practice, 5(2), 108-114.*
- *CDC. (1999). Framework for Program Evaluation in Public Health. MMWR 1999;48 (No. RR-11), updated 2001. Washington, DC: Superintendent of Documents, U.S. Government Printing Office.*  
<http://www.cdc.gov/mmwr/preview/mmwrhtml/rr4811a1.htm>
- *Olson, S. (2006). Partnership Tool Kit: Public Health Excellence Through Partnership, Draft Version 1.0. Centers for Disease Control and Prevention.*