# 6 - EVALUATE YOUR WORK TOGETHER

Partnerships can benefit from periodically reviewing their processes, achievements, and challenges. This review of lessons learned is often referred to as an evaluation. Evaluating your partnership will allow the partners to identify and address issues that could get in the way of their ability to work together, and to find out if their efforts to identify, test, or disseminate solutions are resulting in increased awareness and use of safer work practices and equipment.

Your partnership evaluation can be formal or informal, small or large in scope. It all depends on what your partnership wants to get out of the evaluation and available resources.

*Most groups don't do 'evaluation.' What happens instead is that each individual does their own intrinsic evaluation. They're asking, 'are we producing?' If not, they drop out.*
*– r2p Interagency Working Group member*

This section discusses the purpose and importance of evaluation and focuses on two key areas of evaluation: ***partnership evaluation (how well is the partnership operating)*** and ***r2p evaluation (how effectively is it promoting change).*** It also contains tools to help your partnership with this process.

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## 6.1 READY YOUR EVALUATION

Evaluation is important for partnership sustainability and growth, for gauging whether goals are being met, and for determining whether r2p solutions are working. There are four key reasons why your partnership should consider engaging in evaluation activities:

1. To improve how the partnership works together.
2. To measure the partnership's effectiveness in reaching its r2p goals – greater awareness and use of safer work practices, equipment, or materials.
3. To ensure the effective use of resources.
4. To establish accountability.

[Adapted from: The Pennsylvania Workforce Investment Board. (2009).*The Strategic Industry Partnership Toolkit: A Toolkit for Effective Partnership Management.*]

**When should your partnership start thinking about evaluation?**

The evaluation process works best when it is an integrated part of your partnership's goal-setting and planning process (see **Section 3: Develop a Shared Vision, Mission, and Goals**). Thinking early on about what and how your partnership will evaluate and how to gauge success or progress will actually help create more specific and realistic objectives for your work.

Incorporating evaluation into your partnership's planning process will help ensure that as work progresses you are collecting the information that will be needed to determine what's working and what needs improvement. It will also allow you to take into account the time and resources your partnership has to devote to evaluation and what the appropriate scope should be.

**Evaluation Scope**

Your partnership's evaluation efforts can look very different depending on its goals and available resources. Some evaluation efforts are very scientific and require a lot of time and resources, while some are less resource intensive. Even if your partnership has limited resources and evaluation capabilities, it is important to conduct some level of evaluation.

As a first step, your partnership must make some choices about what is most important to find out and the resources it can allocate to the evaluation process. The scope of your evaluation will help determine whether your partnership will conduct a more comprehensive or scientific evaluation or focus on one particular area. Different areas for evaluation your partnership might consider include:

1. **Partnership Evaluation** – this type of evaluation focuses on how well your partnership is functioning (e.g., how well the partners are working together – see **Section 4: Actively Invest in Group Dynamics**). A well-functioning partnership will be more successful in finding and disseminating solutions and eliciting change in the industry than a partnership that needs a lot of internal improvement. Since you already have access to all partners and additional stakeholders, this type of evaluation may be the easiest to accomplish.

2. **r2p Evaluation** – this type of evaluation focuses on how well your partnership is accomplishing its objectives and whether or not your efforts are having an impact. It can be divided into two sub-types:
   a. **Process Evaluation** – this measures your success in implementing your partnership's planned r2p activities. For example, if your partnership planned on conducting outreach to 1,000 workers through presentations, newsletters, and trainings, your process evaluation would track whether or not this was actually completed. Frequently, this is the most accessible information for partnerships to gather and provides critical information on whether or not the partnership is meeting it goals and objectives.
   b. **Outcome Evaluation** – this type of evaluation measures whether or not your efforts are having an impact on the intended audience: Is there a change in practice, in beliefs, attitudes, or skills, or in injuries and illnesses? When using this approach, it is best to have a "baseline" measure to compare your evaluation to, "control groups" if possible, and indicators of success that are identifiable and measureable. Outcome evaluation can be complex and costly. If highly scientific designs are called for, your partnerships may need to contract with a professional evaluator.

The scope of your partnership's evaluation efforts and the level of investment will depend on:

1. What the partners would like to know about its efforts
2. How important it is to use strong scientific methods to evaluate its efforts
3. How much information or data the partners will be able to collect, analyze and use
4. The partnership's available capacity and resources for evaluation

As your partnership evolves, it is important to revisit and, if needed, change the scope of its evaluation efforts.

Tool **6-A** gives an overview of the evaluation planning process and key questions to ask and answer at each step.

### TOOL 6-A: STEPS IN PLANNING AN EVALUATION

**Step 1:** Identify <u>what</u> your partnership wants to evaluate, such as:

1. Your partnership's ability to work together (**Partnership Evaluation**)
2. How well your partnership has met the goals it set (**r2p Process** & **Outcome Evaluation**)
3. The effectiveness of the partnership's dissemination efforts (**r2p Outcome Evaluation**)

**Step 2:** Identify <u>why</u> your partnership wants to evaluate the items identified in Step 1. Consider:

1. Who will be using the evaluation results or learning from them?
2. What do the partners hope to learn from the process? (e.g., How to work together better? Whether or not changes are occurring in construction practices because of the partnership's work?)
3. What will your partnership do with the evaluation findings, conclusions, and recommendations? (e.g., use them to improve dissemination efforts? To improve a solution or decide if it's working at all? To identify areas of partnership conflict? To document the process and inspire others? To plan for future efforts?)

**Step 3:** Identify <u>who</u> you want to be involved with the evaluation:

1. Will you use an outside evaluator or will you have someone within the partnership lead the evaluation?
2. Will you have a committee within the partnership focus on the evaluation or do it as a group activity?

**Step 4:** Determine what questions you want the evaluation to answer. These questions should be:

SMART – Specific, Measurable, Achievable, Relevant, and Timely (see **Tool 3-E: SMART Objective Template**).

**Step 5:** Develop a detailed evaluation plan as part of the partnership's overall plan, which describes how the evaluation will be done and when each stage will be started and completed. The evaluation plan should identify:

1. What will be examined
2. Whose views/experiences will be gathered
3. How information will be gathered
4. How the information will be analyzed
5. How the findings will be reported
6. Who will have access to the evaluation results
7. How next steps and recommendations will be determined
8. What reports or publications will be produced and, if appropriate, who will be considered an author and in what order credit will be given
9. Overall timeline for evaluation activities

**Step 6:** Carry out the Evaluation. Collect data, both qualitative (numerical) and quantitative (descriptive).

**Step 7:** Analyze and interpret the results.

**Step 8:** Use the Evaluation results to strengthen your partnership and ensure goals and objectives are met.

[Adapted from: The Collaboration Roundtable. (2001). *The Partnership Toolkit: Tools for Building and Sustaining Partnership*, and the International Development Resource Center. (2011). *The Knowledge Translation Toolkit: Bridging the Know-Do Gap: A Resource for Researchers.]*

**Deciding on an internal vs. external evaluation**

Deciding whether the evaluation will be conducted internally or externally is an early step to take. There are benefits and challenges to both approaches.

**Internal Evaluations**

Internal evaluations are conducted by a person or people from within the partnership.

**Benefits**

- May have the trust and cooperation of the partners
- May more completely understand the thinking behind the partnership's activities, the priorities set, and strategies used
- May have an appreciation for challenges that arise
- May not require the same financial outlays associated with hiring a professional evaluator

**Challenges**

- May have difficulty making critical statements
- May be limited in suggesting new solutions to identified problems
- May hesitate to involve partners in more work, because they are aware of the amount of work already put in and other demands on the partners' time
- May be limited in specific evaluation skills needed for more technical evaluations
- May be seen as lacking neutrality

**External Evaluations**

External evaluations are conducted by a third party, or someone not directly involved in the partnership.

**Benefits**

- May be more objective
- May be able to offer new perspective
- May offer technical expertise in evaluation design and methods for more complex evaluations

**Challenges**

- May not fully appreciate the thinking behind the partnership's activities, the priorities set, and strategies used
- Evaluator(s) may lack an understanding of project-related decisions
- May be perceived as having different values by partners or out of touch with the realities of the industry or audience the partnership is dealing with
- May not be accessible due to cost

**Additional Resources**

For more information on choosing between an outside evaluator or doing your own evaluation, visit the following resources:

- **Community Toolbox, Evaluating Community Programs and Initiatives, Chapter 36, Section 4: Choosing Evaluators -** http://ctb.ku.edu/en/tablecontents/sub_section_main_1351.aspx
- **The Pell Institute Evaluation Toolkit -** http://toolkit.pellinstitute.org/evaluation-guide/plan-budget/select-an-evaluator/
- **Evaluation Brief: Selecting an Evaluation Consultant -** http://www.cdc.gov/healthyyouth/evaluation/pdf/brief1.pdf
- **American Evaluation Association Website -** Find an evaluator by state tool - http://www.eval.org/p/cm/ld/fid=108

**Evaluation Data and Methods**

Data are pieces of information collected for your partnership's evaluation activities. They are analyzed for patterns that suggest how things are working. Data can be ***quantitative**,* or based on numbers and statistics, such as the percentage of workers who say on a survey that they have used hearing protection in the previous year. Quantitative data answer questions of "what," "how many," or "who."

Data can also be ***qualitative**,* or based on verbal descriptions, such as partner comments during interviews that demonstrate a commitment to a shared vision and goals. Qualitative data answer questions of "how" and "why."

A variety of methods can be used to collect different kinds of data, including:

- Observations of partnership meetings and partner interactions or changes in what's happening on construction sites as they relate to the partnership's work
- Surveys (written, online, or phone)
- Interviews (in person or over the phone)
- Focus groups

You can also use data that have already been collected by other people or organizations, or for other reasons, such as:

- Meeting minutes (e.g., records of attendance, participation, decisions made)
- Government data (e.g., changes in illness or injury rates over time)

[Adapted from: CDC Heart Disease and Stroke Prevention. (2008). *Evaluation Guide: Fundamentals of Evaluating Partnerships*, http://www.cdc.gov/dhdsp/programs/nhdsp_program/evaluation_guides/docs/partnership_guide.pdf.]

The following table provides information to help your partnership think about the options available to collect data for your evaluation.

| | |
|---|---|
| **Data Collection Source** | Who/what are you collecting data from? |
| **Data Collection Methods** | Will you use quantitative or qualitative data methods, or a combination?<br>❖ Qualitative methods such as in-depth interviews or focus groups are used to obtain more detailed descriptions of examples, feelings, opinions, etc.<br>❖ Quantitative methods such as analyzing government data or conducting surveys are used to obtain statistics, numbers, percentages, etc. |
| **Data Collection Procedures** | What process will you use to collect data? How systematic or consistent can you make the process (e.g., collecting data from all participants in the same time period; using standard evaluation tools; using the same interviewers) |
| **Data Analysis** | Who will analyze the data and how? How much time will you have to analyze data? |
| **Data Use** | How will the data be used? With whom will it be shared? Who "owns" the data and decides how it may be used or shared? The whole partnership? A subset of partners? The evaluator? |
| **Data Presentation** | Will data be presented in a report and/or presentation? How much time will the partners have to review the information? How will this review be done? Are all partners comfortable with or prepared to look at data or will it need to be presented in a format readily understandable for everyone? |

### Developing an Evaluation Plan

After you have considered the various components of your evaluation, it is important to compile the information and include it as part of the partnership's overall plan (see **Sections 3.4: Action Plan to Meet Goals & Objectives and 3.5: Create a Partnership Agreement**). An evaluation plan should cover:

| **Writing an Evaluation Plan** | |
|---|---|
| **What are you evaluating?** *(e.g., your partnership process, effectiveness of a solution, effectiveness of a dissemination effort)* | |
| **What information or data will be collected and reviewed?**<br>*(e.g., meeting minutes, reports, survey results, research findings)* | |
| **Whose views will be gathered?**<br>*(e.g., individual partners, individuals who worked with the partnership, those that should be benefiting from the partnership's work)* | |
| **How will those views be gathered?**<br>*(e.g., focus group meetings, personal interviews, written questionnaires, a combination of methods)* | |
| **How will the information be assessed and reported?** | |
| **What opportunities will the partners have to comment on the findings, conclusions, and recommendations before they are finalized?** | |
| **When will each of the evaluation activities be completed and how will the final results be presented and used?** | |

[Adapted from: The Collaboration Roundtable. (2001). *The Partnership Toolkit: Tools for Building and Sustaining Partnership*.]

**Reminders and Additional Tips for a Successful Evaluation:**

- Evaluation is an ongoing process in the improvement of your partnership's work.
- Establish an evaluation plan during your r2p partnership planning.
- Start small, be creative and flexible.
- Engage partners and staff in the evaluation planning and implementation process.
- Allow time and allocate resources (budget and cost considerations) for evaluation.
- Match evaluation methods to evaluation questions.
- Use and adapt existing tools.
- Report results clearly and often.
- Be sensitive to partners' time and needs.

[Adapted from: CDC Heart Disease and Stroke Prevention. (2008). *Evaluation Guide: Fundamentals of Evaluating Partnerships,* http://www.cdc.gov/dhdsp/programs/nhdsp_program/evaluation_guides/docs/partnership_guide.pdf.]

**Additional Resources**

For more evaluation tools, visit the following resource:

- **The American Evaluation Association e-library -** http://comm.eval.org/communities/resources/libraryview/?LibraryKey=1eff4fd7-afa0-42e1-b275-f65881b7489b

## 6.2 CONDUCT YOUR PARTNERSHIP EVALUATION

Conducting some form of partnership evaluation is an important way to identify problems and maintain healthy collaborative relationships. Evaluation results can be used to celebrate your partnership's successes and can provide regular opportunities to identify and address challenges before it is too late.

Setting a specific schedule for when the partnership will step back and consider where it has been and where it is going can be helpful. Consider conducting evaluations at regular intervals, such as annually or at the beginning, middle, and end of a partnership stage.

**Fundamental Partnership Evaluation Questions:**

1. Rationale – why did we decide to work as partners?
2. Impact – what has happened as a result of our work together as partners?
3. Goals – did we achieve what we expected to achieve or are we making progress toward achieving our goals?
4. Facilitators – what factors have helped us collaborate or progress in our work together?
5. Barriers – what challenges have we experienced in our partnership and with implementing solutions?
6. Value – is the outcome so far worth the expenditure of effort and other resources?
7. Alternatives – are there better ways of working together?
8. Next Steps – how will we use the evaluation findings?

The following tools provide questions your partnership can draw from and adapt as you develop the actual instruments to use in your evaluation. **Tool 6-C: Meeting Effectiveness Survey** focuses specifically on the effectiveness of the partnership meetings, and both **Tools 6-D: Partnership Assessment Questionnaire** and **6-E: Partnership Annual General Satisfaction Survey** can help your partnership identify areas of collaboration that could be strengthened.

## TOOL 6-C: MEETING EFFECTIVENESS SURVEY

It is important to assess partnership meetings when conducting an evaluation since partner perceptions of the extent to which meetings are worthwhile, well-run, and organized will affect whether they continue to participate. The following tool can be used to quickly gather feedback on partnership meetings. This can be built into regular partnership evaluation efforts (similar questions are included in **Tools 6-D** and **6-E**) or conducted as a stand-alone activity.

Instructions:

1. The partners, your partnership evaluator, or the evaluation committee should identify the questions to include by selecting from among the listed questions, developing new questions of their own, or doing a combination of both.
2. Print out the survey and distribute it at a partnership meeting or create an online survey and distribute electronically (online tools such as Survey Monkey (www.surveymonkey.com) or Qualtrics (http://www.qualtrics.com) can be useful resources in developing online surveys).
3. Ask each partner to complete the survey by a given date. Making it anonymous may make partners feel they can respond more freely.
4. Be sure to compile and share the results with the entire partnership. Involve the facilitator to help think about the best ways to present the information to the larger group and to brainstorm ideas for how to address any problems that may surface.
5. Conduct this evaluation periodically to track progress and to make sure the meetings are effective.

**Meeting Effectiveness Survey**

| | Strongly Disagree | Disagree | Agree | Strongly Agree |
|---|---|---|---|---|
| The goals of the meeting were clear to me. | | | | |
| My level of participation was comfortable for me. | | | | |
| Most attendees participated in meeting discussion. | | | | |
| The facilitator during the meeting provided clear direction. | | | | |
| Meeting participants worked well together. | | | | |
| Discussion at the meeting was productive. | | | | |
| The meeting was well organized. | | | | |
| The meeting was a productive use of my time. | | | | |
| The presentations enhanced my ability to participate in the meeting. | | | | |
| Decisions were made by only a few people. | | | | |
| Decisions were made in accordance with the established rules. | | | | |
| The meeting objectives were met. | | | | |

[Adapted from: CDC Heart Disease and Stroke Prevention. (2008). *Evaluation Guide: Fundamentals of Evaluating Partnerships*, http://www.cdc.gov/dhdsp/programs/nhdsp_program/evaluation_guides/docs/partnership_guide.pdf.]

**TOOL 6-D: PARTNERSHIP ASSESSMENT QUESTIONNAIRE**

Instructions:

1. Make a copy of the following questionnaire for each partner.
2. Have each partner respond individually to the questions.
3. In advance of this activity or once it has been completed, create a tally sheet numbered 1-40 on a flipchart or whiteboard. *Note: Do not let the group see this tally sheet until the questionnaires have been completed and turned in*.
4. Collect the completed questionnaires and tally the responses. The questions are divided into nine topic areas that reflect items covered in other sections of this toolkit. You can tally the responses then list the total number of "Yes" and "No" responses on the chart, or put an X by the number for each "NO" response. The point is for the partners to see how they collectively responded.
   *Note: This can be done in front of all the partners or it can be done outside of a meeting if you believe that it is important to try to keep individual responses confidential.*
5. After you have tallied the results, let the partners know which questions apply to which key partnership areas (see bolded titles below).
   - Questions 1–4 pertain to partner **involvement**.
     (See **Section1: Identify and Involve Key Stakeholders**)
   - Questions 5–9 pertain to **trust** within the partnership.
     (See **Section 4: Actively Invest in Group Dynamics**)
   - Questions 10–12 address **shared vision**.
     (See **Section 3: Develop a Shared Vision, Mission, and Goals**)
   - Questions 13–15 consider the **expertise** within the partnership.
     (See **Section 3: Develop a Shared Vision, Mission, and Goals**)
   - Questions 16–20 address issues of **teamwork**, as defined by joint decision-making, joint responsibility, and sharing power.
     (See **Section 4: Actively Invest in Group Dynamics**)
   - Questions 21–23 look at open **communication** among the partners.
     (See **Section 4: Actively Invest in Group Dynamics**)
   - Questions 24–27 address **motivating** the partnership to keep it energized.
     (See **Section 4: Actively Invest in Group Dynamics**)
   - Questions 28 and 29 consider availability of **resources** to do the work of the partnership.
     (See **Section 1: Identify and Involve Key Stakeholders**)
   - Questions 30–33 pertain to whether the partnership has designed a **plan** of action to guide their work.
     (See **Section 5: Implementing and Disseminating Solutions**)
   - Questions 36-40 ask about the **next phase** for the partnership
     (See **Section 7 – Allow Your Partnership to Evolve**)

If the "NO" responses are clustered in one of these areas, this indicates that your partnership needs to work on that particular area. If the "NO" answers are scattered throughout the nine areas, further discussion with the partnership will be needed to identify particular issues. Areas that appear to be relatively strong, with few "NO" answers should also be acknowledged, but do not require further discussion at this time.

As you review the results with your partnership, remind the partners that identifying and working together to tackle issues can make the partnership stronger. Identifying problem areas is not necessarily a bad sign, and partners are more likely to stick with the partnership if it is clear that there is a commitment to facing and addressing them.

**Partnership Assessment Questionnaire**

(Circle "Yes" or "No" for each question – do not skip any)

| | | |
|---|---|---|
| Yes | No | 1. Is there a strong core of committed partners? |
| Yes | No | 2. Are all partners affected by the problem/issue they have set out to address? |
| Yes | No | 3. Is the team open to reaching out to include new people? |
| Yes | No | 4. Are there opportunities for meaningful involvement from all interested partners? |
| Yes | No | 5. Have partnership norms been developed? |
| Yes | No | 6. Do partners demonstrate a willingness to share resources? |
| Yes | No | 7. Is time provided for partners to get to know each other? |
| Yes | No | 8. Have organizational and/or interpersonal relationships deepened as a result of the partners working together? |
| Yes | No | 9. Do you trust other partners to move beyond personal agendas? |
| Yes | No | 10. Are all partners clear about the purpose of the partnership? |
| Yes | No | 11. When new partners have joined or others have been brought in to work with the partnership, is it easy to explain to them what the partnership is about? |
| Yes | No | 12. Are all partners in agreement on the purpose of the partnership? |
| Yes | No | 13. Do you know what skills other partners have? |
| Yes | No | 14. Do you know what skills/expertise the partnership needs to achieve its goals? |
| Yes | No | 15. If you have a task that requires expertise unavailable within the partnership, do you know where to access that expertise so implementation of the plan can continue? |
| Yes | No | 16. Are meetings well run and organized? |
| Yes | No | 17. Do partners volunteer freely to work on projects? |
| Yes | No | 18. Do partners share responsibility for completing tasks? |
| Yes | No | 19. Do leadership responsibilities shift with a shift in tasks? |
| Yes | No | 20. Do all partners feel free to speak at meetings? |
| Yes | No | 21. Are decisions and information communicated to all partners in a planned and organized fashion? |
| Yes | No | 22. Is there a regular time to provide feedback on the partnership's efforts to the project? |
| Yes | No | 23. Do you feel that your opinions are heard and respected? |
| Yes | No | 24. Is it satisfying working with this partnership? |
| Yes | No | 25. Is the partnership making steady progress in working toward the goal? |
| Yes | No | 26. If the partnership is open to including new partners as time goes on, do those appropriate people want to join and stay with the project? |
| Yes | No | 27. Do other stakeholders, such as researchers or manufacturers want to work with the partnership in support of their goals? |
| Yes | No | 28. Are there enough people involved in the partnership to do the work needed in a realistic timeframe? |
| Yes | No | 29. Do you have the financial resources to do what the partnership wants to accomplish? |

| | | |
|---|---|---|
| Yes | No | 30. Is it clear what strategies your partnership is using to achieve its goals? |
| Yes | No | 31. Are partners clear about what is expected of them? |
| Yes | No | 32. Do partners follow through on what they say they will do? |
| Yes | No | 33. Do the partners seem to stay on track in addressing issues? |
| Yes | No | 34. Does the partnership seem to be at a transition point? |
| Yes | No | 35. Are there issues partners can work together on that had not previously been planned? |
| Yes | No | 36. Has the partnership gained recognition and influence within the industry? |
| Yes | No | 37. Is the partnership in a position to move on to address issues that were previously considered out of reach? |
| Yes | No | 38. Once you accomplish your goal, is there any continued need for the partnership? |
| Yes | No | 39. Is the partnership sustainable long-term? (Does it have funding, resources, and a high level of commitment from all partners moving forward?) |
| Yes | No | 40. If there is more to be done, does the partnership need to bring in new partners for a specific project or to accomplish its overall goals? |

## TOOL 6-E: PARTNERSHIP ANNUAL GENERAL SATISFACTION SURVEY

Partners' general satisfaction with the partnership can be assessed by asking some or all of the following questions, as well as any that are particularly relevant to issues your partnership is facing. You may also want to add space for comments after each question or group of questions for partners to explain their answers or provide additional input.

Instructions:

1. The partners, your partnership evaluator, or the evaluation committee should identify the questions to include by selecting from among the listed questions, developing new questions of their own, or doing a combination of both. If you have developed a partnership agreement (see **Section 3: Develop a Shared Vision, Mission, and Goals**), you may want to include specific questions about how well different parts of the agreement are holding up.

2. Print out the survey and distribute it at a partnership meeting or create an online survey and distribute electronically (online tools such as Survey Monkey (www.surveymonkey.com) or Qualtrics (http://www.qualtrics.com) can be useful resources in developing online surveys).

3. Ask each partner to complete the survey by a given date. Making it anonymous may make partners feel they can respond more freely, however collecting some relevant information can also be useful for identifying whether certain groups are experiencing challenges more than others (e.g., partner institutions or affiliations – labor, management, community).

4. Be sure to compile and share the results with the entire partnership. Involve the facilitator to help think about the best ways to present the information to the larger group and to brainstorm ideas for how to address any problems that may surface.

5. Conduct this evaluation periodically to track your progress. This can be done at regular intervals, such as annually or at key stages in the partnership (See **Section 7: Allow Your Partnership to Evolve**).

| | Strongly Disagree | Disagree | Agree | Strongly Agree |
|---|---|---|---|---|
| **General Satisfaction** | | | | |
| 1. I am generally satisfied with the activities and progress of the partnership during the past (*fill in time period*). | | | | |
| 2. I have a sense of ownership in what the partnership does and accomplishes. | | | | |
| 3. I am satisfied with the types of projects that the partnership has undertaken. | | | | |
| 4. I am satisfied with the priorities that the partnership has set and the strategies used. | | | | |
| 5. I frequently think of having my organization sever its affiliation with the partnership. | | | | |
| 6. I have adequate knowledge of the partnership resources, and how resources are allocated. | | | | |
| 7. Thus far, the partnership has distributed available resources in a fair and equitable manner. | | | | |
| 8. I would like to have more input regarding the allocation of partnership resources. | | | | |
| 9. The partnership has been effective in achieving its goals. | | | | |
| 10. The partnership can have a positive effect in the construction industry. | | | | |
| 11. Participation in the partnership has increased my knowledge and understanding of the other organizations represented. | | | | |
| **Impact** | | | | |
| 12. I have increased my knowledge of construction safety and health issues during the past (*fill in time period*). | | | | |
| 13. Participation in the partnership has increased my organization's capacity to participate in construction safety and health research. | | | | |
| 14. My organization uses knowledge generated by the partnership. | | | | |
| 15. I believe that other non-partner organizations know about the partnership and its initiatives. | | | | |
| 16. I believe that other non-partner organizations use knowledge generated by the partnership. | | | | |

| | | | | |
|---|---|---|---|---|
| 17. The partnership has been effective in informing regulators about the partnership and its initiatives. | | | | |
| 18. It is important that regulators are informed about the partnership and its initiatives. | | | | |
| **Trust** | | | | |
| 19. Relationships go beyond the individual partners at the table to include partner organizations. | | | | |
| 20. I am comfortable requesting assistance from other partners when I feel that their input can be of value. | | | | |
| 21. I can talk openly and honestly in partnership meetings. | | | | |
| 22. I am comfortable expressing my point of view at partnership meetings. | | | | |
| 23. I am comfortable bringing up new ideas at partnership meetings. | | | | |
| 24. Partners respect each other's points of view even if they might disagree. | | | | |
| 25. My opinion is listened to and considered by other partners. | | | | |
| 26. Over the past *(fill in time period)*, my willingness to speak and express my opinions at partnership meetings has increased. | | | | |
| 27. Over the past *(fill in time period)*, the amount of trust between partners has increased. | | | | |
| 28. Over the past *(fill in time period)*, partners' capacity to work well together has increased. | | | | |
| **Partnership Decisions** | | | | |
| 29. I am satisfied with the way in which the partnership makes decisions. | | | | |
| 30. All partners have a voice in decisions made by the partnership. | | | | |
| 31. It often takes the partnership too long to reach a decision. | | | | |
| 32. Decisions about partnership resources are made in a fair manner. | | | | |
| 33. Partners work well together to solve problems. | | | | |
| **Organization and Structure of Meetings** | | | | |
| 34. I find partnership meetings useful. | | | | |
| 35. Partnership meetings are well organized. | | | | |

| | | | | |
|---|---|---|---|---|
| 36. We discuss important issues at partnership meetings. | | | | |
| 37. I wish we spent more time at meetings hearing about and discussing specific partnership efforts. | | | | |
| 38. Partnership meetings are held too frequently. | | | | |
| 39. We do not accomplish very much at partnership meetings. | | | | |
| 40. I believe that we adequately address all of the agenda items at partnership meetings. | | | | |
| 41. When I want to place something on the meeting agenda, I am comfortable with the process. | | | | |
| 42. I would like more voice in determining agenda items for the partnership meetings. | | | | |
| 43. When the decisions are made, appropriate follow-up action is taken by the partners assigned. | | | | |
| 44. Certain individuals' opinions get weighed more than they should. | | | | |
| 45. One person or group dominates the partnership meetings. | | | | |
| 46. Meetings are held in locations that are convenient to all partners. | | | | |
| 47. Partners who must call into meetings by phone (or through the use of other technology) are able to fully and actively participate. | | | | |
| **Equitable Participation** | | | | |
| 48. Partners share tasks and responsibilities equally. | | | | |
| 49. All partners are committed to carrying out their tasks and responsibilities. | | | | |
| 50. All partners put in the time necessary to complete tasks and progress on the project. | | | | |

[Adapted from: Israel, B., Eng, E., Schulz, A., Parker, E. (2012). Methods in Community Based Participatory Research for Health. *Closed-Ended Survey Questionnaire for Board of Evaluation*, 1997-2002.]

**Additional Resources**
For more information on evaluation techniques, visit the following resource:

- **PARTNER (Program to Analyze, Record, and Track Networks to Enhance Relationships)-** This program was designed to evaluate partnerships using a social network analysis approach. The PARTNER Tool is a free open source tool supported by funding from Robert Wood Johnson Foundation - http://www.partnertool.net/.

## 6.3 CONDUCT YOUR R2P EVALUATION

It is important to evaluate your r2p efforts to gauge how effective you have been in increasing awareness and use of the research-based solutions identified by your partnership as priorities. Are your dissemination efforts working? Has there been any measureable change in the industry to reflect this? Have new research gaps or needs for new solutions been identified?

As mentioned in **Section 6.1**, it can be helpful to think of an r2p evaluation as having two elements: *process* and *outcome.*

**Process Evaluation**

Process evaluation looks at the way in which your partnership's r2p activities are conducted and implemented. The process evaluation can help your partnership stay focused, track its progress, and make any adjustments that are necessary. It can provide insight into factors that positively or negatively impacted your r2p efforts. Frequently, this is the best opportunity for a partnership to determine whether or not they have disseminated information into the hands of the intended audience.

Potential Questions Answered by a Process Evaluation:
- Was each activity to promote a solution completed as planned?
- Was enough information provided to contractors and workers to allow them to a) make an informed decision about using the solution, and/or b) begin using the solution?
- Did the information on the solution reach the target audiences? How many workers and/or contractors received information?
- How was the information shared? How many program announcements/materials were distributed?
- What were workers' and contractors' perceptions of the solution(s)?
- What were the strengths of the way the solution was promoted?
- What were the difficulties, barriers, or challenges to promoting the solution?
- Were the resources needed to promote the solution available?

[Adapted from: The Pennsylvania Workforce Investment Board. (2009).*The Strategic Industry Partnership Toolkit: A Toolkit for Effective Partnership Management.*]

Refer back to your evaluation plan (see **Developing an Evaluation Plan at the beginning of this section**) and add any process evaluation questions that are not already reflected.

**Outcome Evaluation**

Outcome evaluation looks at the end results or the effects of the partnership's efforts to increase use of a safer work practice or piece of equipment. It provides a concrete measure of change.

It may not be possible to capture the ultimate end outcomes you are trying to affect, such as improvements in long-term safety and health. However, there are usually **intermediary outcomes** or indications that change is headed in the right direction, and these are important measures of success to identify for your partnership's goals and objectives (see **Section 3: Develop a Shared Vision, Mission, and Goals**).

The design and implementation of a strong outcome evaluation can be complex and may require specific technical skills. You may want to use the resources at the end of this section, or seek consultation from a professional evaluator, or university-based researcher, if having scientific evidence demonstrating results is important to your partnership's work.

The following are r2p evaluation dimensions your partnership may want to include in your outcome evaluation efforts:

- **Effectiveness:** The extent to which a solution reduced or eliminated the hazard
- **Impact:** The totality of the effects of a solution, positive and negative, intended and unintended
- **Relevance:** The extent to which a solution met contractors' and workers' needs
- **Sustainability:** The continuation or longevity of benefits from a solution
- **Efficiency:** The extent to which the cost of a solution can be justified by its results (Use CPWR's ROI Calculator (www.safecalc.org) to calculate the return on investment from using a solution.)

[Adapted from: Molund .S, Schill G. (2004). *Looking Back and Moving Forward: Sida Evaluation Manual. Stockholm: Sida,* http://www.alnap.org/resource/7902.]

Potential Questions Answered by an Outcome Evaluation:

- Was there increased use of the solution by members of the target audience?
- Was there a change in awareness, knowledge, attitudes, skills, or behaviors among stakeholders?
- Did increased use of the solution reduce injuries or illnesses? How?
- Did contractors or workers report any significant problems (decrease in productivity? resistance to use? difficulty finding the solution?)

[Adapted from: The Pennsylvania Workforce Investment Board. (2009).*The Strategic Industry Partnership Toolkit: A Toolkit for Effective Partnership Management.*]

The following tool will help you keep track of your goals, objectives, the data collected, and how it will be used in the evaluation.

**TOOL 6-F: GOALS & OBJECTIVES METRICS CHART**

Instructions:

1. Write a partnership goal at the top of the table. Use a separate table for each of your goals.
2. As a partnership or with your evaluation team, list all of the SMART objectives (see **Section 3.3: Develop Partnership Goals and Objectives**) associated with the goal in the first row. An example has been included in the table below.
3. Fill in each section for all objectives, taking into consideration the following:
    a. Which methods and tools are best suited to capture change for the objective?
    b. Is there an appropriate mix of qualitative and quantitative data gathering tools? (Qualitative data answer "why" and "how" questions, while quantitative data answer "what," "how many," and "who" questions.)
    c. Do we have the resources, time, and expertise to collect and analyze the data using these tools?

| Goals & Objectives Metrics Chart | | |
|---|---|---|
| **Goal 1:** *(Example) Increase fall protection planning among residential contractors* | | |
| **Objectives** | **Objective 1:** *In the next two years, increase reported awareness of need to plan for fall protection among area contractors by 35%.* | **Objective 2:** |
| **Measures** | *Percent change in contractors surveyed reporting awareness of need for fall protection planning* | |
| **Data Sources** | *50 area residential roofing contractors* | |
| **Data Collection** | *Closed-ended, in-person surveys of 50 residential contractors conducted at baseline and follow-up after two years.*<br><br>*Administered by evaluation committee & student workers from local college.* | |
| **Time Frame** | *July 2013 – July 2015* | |
| **Data Analysis** | *Partner A will conduct data analysis using excel spreadsheet.* | |
| **Communication of Results** | *Results will be shared with partnership and discussed. Results will also be written up in a summary report. Presentations will be made to residential contractors, at union and worker center meetings, and to OSHA staff.* | |
| **Person(s) Responsible** | *Partner A will lead survey efforts* | |

## RE-AIM Framework for Understanding r2p Impact

The RE-AIM Framework uses a combination of factors to evaluate the r2p impact of a dissemination effort. RE-AIM stands for:

**R – Reach:** Is information on the solution reaching the target audiences – workers and/or contractors?
**E – Effectiveness:** How do you know if the solution is achieving the desired objectives (e.g., reducing or eliminating a hazard and improving safety and health)?
**A – Adoption:** How do you develop support from partnership constituents to deliver information on a solution? What percent of companies are now aware of your solution?
**I – Implementation:** How do you ensure the solution is being used properly? Are there barriers to use?
**M – Maintenance:** How does your partnership plan to continue promoting adoption of the solution over time?

The following is a planning tool using the RE-AIM Framework which can help your partnership come up with evaluation questions focused on both the process and the impact of your dissemination effort.

### TOOL 6-G: RE-AIM PLANNING TOOL

| PLANNING CHECKLIST Questions to Improve REACH |
|---|
| 1. Do you hope to reach all members of your target population? If yes, provide a number or estimate for your target population. If no (due to large size of the target population or budget constraints), provide the proportion of the target population that you want to reach ideally, given constraints. |
| 2. What is the breakdown of the demographics of your target population in terms of race/ethnicity, gender, age, and socioeconomic status? |
| 3. How confident are you that your program will successfully attract all members of your target population regardless of age, race/ethnicity, gender, socioeconomic status, and other important characteristics, such as health literacy?<br>1 2 3 4 5 6 7 8 9 10<br>(where 1 = not at all confident, 5 = somewhat confident, and 10 = completely confident) |
| 4. What are the barriers you foresee that will limit your ability to successfully reach your intended target population? |
| 5. How do you hope to overcome these barriers? |
| 6. Rate how confident you are that you can overcome these barriers.<br>1 2 3 4 5 6 7 8 9 10<br>(where 1 = not at all confident, 5 = somewhat confident, and 10 = completely confident) |

[Virginia Tech. *What is RE-AIM?*, http://www.re-aim.org/resources_and_tools/measures/planningtool.pdf.]

**Additional Resources**

For more information on conducting an evaluation, visit the following resources:

- **Evaluation Toolkit by the Pell Institute -** http://toolkit.pellinstitute.org
- **CDC Evaluation Guides -** http://www.cdc.gov/dhdsp/programs/nhdsp_program/evaluation_guides/index.htm

- **Planning a Program Evaluation from the University of Wisconsin Cooperative Extension -** http://learningstore.uwex.edu/assets/pdfs/G3658-1.PDF
- **The Community Toolbox – Chapter 36 – Evaluation -** http://ctb.ku.edu/en/tablecontents/chapter_1036.aspx