Optimizing Partnership Projects for Systems Change

A Toolkit for Funders and Partners

health nexus santé

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Women and Gender Equality Canada Femmes et Égalité des genres Canada Canada

Welcome

Are you a funder, a policymaker, a partner in a network or project, a partnership coach, or a partnership researcher?

This toolkit provides evidence-informed, action-oriented recommendations and resources about partnership projects for systems change, and how to effectively fund and optimize the impacts of such partnerships.

- Recommendations and resources are informed by Health Nexus' national three-year project that evaluated an innovative partnership funding model and included third-party partnership support (coaching) services. Unless otherwise noted, all quotes in this toolkit are from core partners of the partnership projects who participated in the evaluation research.
- Further guidance is provided from Health Nexus' three decades of experience and preferred resource materials supporting partnership development and education.

This publication is grounded in an evidence-based, equity-focused framework.

Background

This toolkit was informed by a three-year evaluation of an innovative model for funding and supporting partnership projects.

The evaluation work as well as the five partnership projects and the supporting partnership coaching activities, which inform the evaluative learnings, were all funded by the Ministry for Women and Gender Equality Canada (WAGE), formerly Status of Women Canada.

Health Nexus appreciates WAGE's openness to innovation when challenged with the complexities of systems change work for gender equity, and WAGE's parallel investment in evaluative research to tease out learnings from a new approach to partnership funding so that future efforts can be most effective.

For more information on the innovative partnership funding model, its evaluation, and the evaluation results, see Health Nexus (2020) *Partnership Projects for Systems Change on Gender Equity: A Snapshot of Key Learnings*.

The figure below illustrates how primary voices informed this evaluation research.

Reflection meetings

49 participants

5 in-person meetings each year.

Check-ins

21 participants

Check-in phone calls in year 2.

Consultations

13 participants

provided feedback on draft recommendations.

Interviews

18 key informant interviews

with project partners, funders and partnership coaches.

Survey

23 responses

to end-of-project survey.

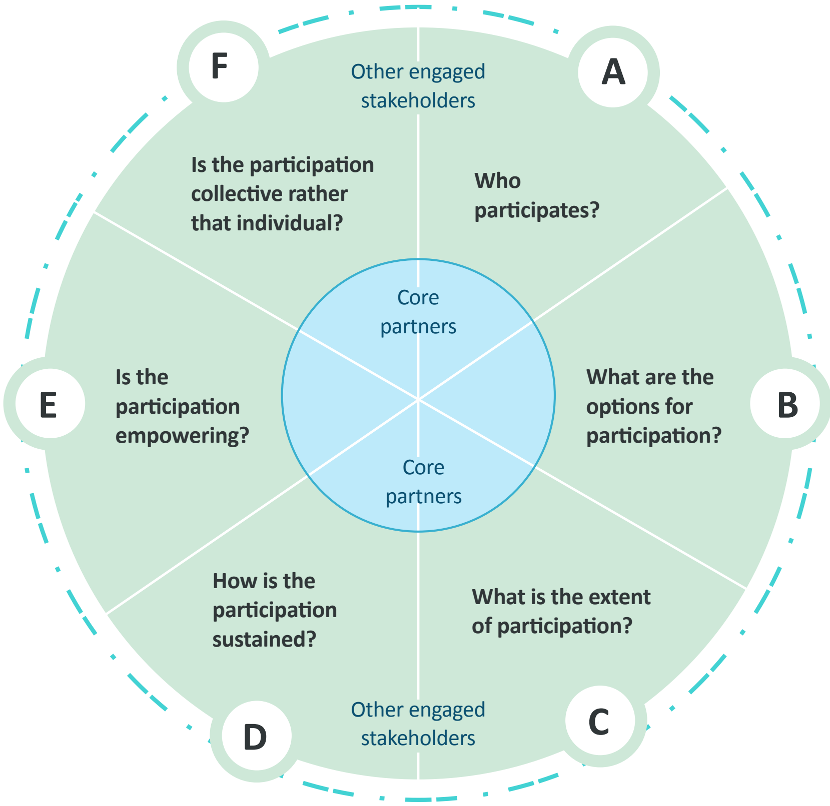
Further guidance within the toolkit is based on Health Nexus' three decades of experience and preferred resource materials supporting partnership development and education.

This toolkit is grounded in an an evidence-based, equity-focused framework of six requirements for effective action in partnership, from the work of Bilodeau et al.[1] The six requirements were derived from "…a series of case studies based on Actor Network Theory"[2] and then developed into the *Self-Evaluation Tool for Action in Partnership*.[3]

Bilodeau et al.'s six requirements are:

1. The range of perspectives relevant to the issue.
2. Early stakeholder involvement in strategic decisions.
3. Engagement of stakeholders in negotiating and influencing decisions.
4. Commitment of strategic and pivotal stakeholders to the project.
5. Partnership arrangements that favour equalization of power among the stakeholders.
6. Partnership arrangements that help build collective action.

These six requirements were adapted by Health Nexus into a *Partnership Assessment Wheel* for data collection, and as an analytical framework for the evaluation research.



Health Nexus' *Wheel* poses questions (see figure) that bring to the forefront the equity-related indicators from Bilodeau et al.'s *Self-Evaluation Tool.*

The *Wheel's* circular shape references holistic knowledge traditions and highlights the interdependence of the six requirements.

The full *Partnership Assessment Wheel*, as well as steps for using it to guide a participatory reflection activity among partners, are published in the appendices of this toolkit on page 37.

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

[2] Bilodeau, A. & Kranias, G. (2019). Self-Evaluation Tool for Action in Partnership: Translation and Cultural Adaptation of the Original Quebec French Tool to Canadian English. *Canadian Journal of Program Evaluation*, 34.2(Fall 2019), p. 193.

[3] Bilodeau, A., Galarneau, M., Fournier, M., Potvin, L., Sénécal, G., & Bernier, J. (2017). *Self-Evaluation Tool for Action in Partnership*, Health Nexus.

Recommendations to Funders

Fund systems change projects for 5 or more years

> ***It is doubtful that we will achieve the expected results in 3 years ...especially if we really want to implement practical changes in [systems] that have been operating for a long time. We are sowing small seeds.***

Changing systems is incremental work. It can be counterproductive to fund projects for systems change for 3 years or less. Typically, projects start picking up the pace with implementation towards the end of the second year, but then have to direct their efforts towards project wrap-up and sustainability shortly thereafter. As a result, the progress they made in changing systems may be at risk, as they struggle to fully integrate these changes because they are running out of funding time and money. Likewise, because new funding calls for proposals often require new partnerships with a new focus, the momentum and networks established during shorter projects are often lost. Projects funded for 5 years or more are more likely to yield a stronger return on the funder's investment.

> ***In a 3-year period... we will have done a bit, but we are missing the time to share... It takes a lot to convince [the people at the top of the system] to change. The research part (1st phase) is easier, but... [the people at the top] are very very busy... to find time to talk, make an action plan, put it into place... it doesn't happen quickly.***

Building strong partnerships takes time. Essential components for successful partnership and project work include[4]: connecting, fostering shared understanding and trust, creating a shared vision, developing collaborative processes and workplans, acting collectively, and reflecting. Building this foundation for action takes time.

It can take even more time when:

- Partners have little or no previous experience working with each other.
- Partners are geographically distanced from each other.
- The partnership includes groups who have limited financial and human resources (e.g., a grassroots organization).
- Funders request that specific groups partner together, especially when those groups have differing organizational cultures or differing approaches to equity and inclusion work.

> ***It is now, after 2 years, that the partnership is coming to fruition - this reinforces that we need more than 3 years of funding.***

Without adequate time and effort during their partnership development phase, it is possible for partnerships to suffer. Workloads can be very uneven, conflict can be ongoing, work can happen in parallel instead of collaboratively, and project impacts can be compromised.

[4] Health Nexus. (2018). *Partnership Essentials*. Health Nexus. p.7

Mobilizing other stakeholders for action requires sustained effort and adaptation. There are often additional stakeholders, outside of the funded partners, who are connected to the system and whose participation is key to implementing action. The timeline and efforts for building partnerships are subject to these stakeholders' own capacities, realities, and their processes for engagement. For example, in political systems, timely and meaningful access to stakeholders can vary due to bureaucratic channels of communication, elections, and shakeups in government that result in restructuring or change in priorities. Collaborating with other key organizations and mobilizing community groups for action also demand sustained efforts and flexible timelines, though the challenges and opportunities differ.

> ***If you bring people together, there emerge solutions that you didn't know possible.***

> ***[After 1 year], we're not in competition [with this other key stakeholder] anymore... we are proud of how we approached them... the relationships and collaborations that we built will serve us well for the future...***

How might projects of 5 or more years unfold? A longer period of project funding recognizes the incremental and dynamic reality of systems change work. It scaffolds collaborations for tangible systems change and provides stronger returns on funder investment. In 5 or more years, projects are better positioned to assess system-level impacts of a partnership's work.

Projects funded for 5-6 years might unfold as follows:

- 6-12 months for partnership building, background research and assessments, and collaborative work planning.
- 36 months for implementation of the central project activities.
- 12-18 months for building sustainability, evaluating impacts, and project wrap-up.

Apply a participatory and developmental approach to project evaluation

There is no one who can go into a systemic change project and know the relevant deliverables - we need some flexibility in the deliverables. Have an approach: that's what we want to try to do; then be flexible on the road... [asking] is it for the best interest of our project?

Projects can deliver greater systems changes when they utilize participatory and developmental approaches. A developmental approach emphasizes flexibility and responsiveness, and a participatory approach accentuates collaboration among a widened range of stakeholders.

The strengths of these approaches, when combined, can bring about bigger systems change impacts. Partnership projects can more readily bridge differences, respond to emerging circumstances, and optimize their impacts when evaluation activities combine the data and feedback loops that characterize a developmental approach with the co-leadership and collaborative analyses used in participatory methodologies. More diverse partners work together in determining directions, effectiveness, and potential improvements for the project work. Also, partners who engage in participatory and developmental evaluation activities share and apply emergent learnings in complex and interdependent ways, which can deepen and broaden project impacts.

"**Participatory evaluation**... invite[s] and facilitate[s] more involvement and co-leadership from the people most directly involved with and affected by your activities... Reflecting its equity and social justice roots, participatory evaluation devotes extra attention and resources to ensure that equity-seeking people and groups take their rightful place as co-leaders in all activities – from choosing evaluation questions and designing a plan through to collecting information or stories and analyzing results."[5]

"**Developmental evaluation** helps community organizations increase the impact of their work by providing real-time data and feedback to adapt an intervention as it unfolds. In contrast to formative or summative evaluation, developmental evaluation supports the creation, development or radical adaptation of a model in real-time."[6]

For considering the complementary relationship between participatory and developmental evaluation:

3 Approaches to Evaluation, an infographic outlining developmental, participatory, and conventional evaluation styles, on page 42 of this toolkit

[5] Health Nexus. (2018). *Participatory Evaluation Toolkit*. Health Nexus. p.3

[6] Innoweave. (2020, January 28). Developmental Evaluation. *Innoweave*. https://innoweave.ca/streams/developmental-evaluation/

Support partnerships to design participatory and developmental evaluations

Funders and funding program officers can begin supporting partners in the design of project and partnership evaluation plans by referencing and becoming familiar with the source documents of the definitions quoted on page 12. When possible, funding program officers can support partnerships with evaluation design, or the funder can contract third-party partnership coaches (see page 22) to do this, keeping in mind the available resources for project evaluation.

Funders can adapt project proposal forms to prompt partnerships in designing evaluations that are both participatory and developmental. For some suggested questions, see page 31 of this toolkit.

Support changes to project evaluation that respond to emerging circumstances

At the proposal development stage, project partners choose evaluation indicators and outcomes that are relevant to the project and its diverse stakeholders. As the project unfolds, unexpected and emergent circumstances can require a project to shift strategies and direction in order to best meet its overall objective for systems change. Projects designed with a developmental approach are better prepared to manage these shifts. Additionally, when funding program officers have some discretion related to adjustments in evaluation measures, budgets, or reporting, it is highly recommended to pro-actively communicate this to the funded projects so that, when the need arises, these conversations can be initiated early by a project.

Notable circumstances that may trigger changes include:

- Unanticipated findings from research that lead to the identification of specific resource development needs or new or adapted outreach strategies.
- Emerging collaboration with additional stakeholders that will amplify the project's capacity and impact on systems change.
- Unanticipated changes among powerful stakeholder groups such as newly elected officials or newly formed political parties gaining power.
- Unanticipated restructuring in the system that the project is working to change.
- Unexpected high-profile occurrences (e.g., crises, scandals, movements, political shifts) that move stakeholders' attention and resources either away from or towards the issue of focus, shake up the system, and have ripple effects.

The capacity for funders to respond in a timely manner when project priorities shift due to emergent and unanticipated circumstances is a concrete means to optimize projects' success in achieving systems change.

> ***There are so many factors over which we have absolutely no control... And in politics, it changes - groups, contacts, etc. never stay the same.***

Support changes to project budgets that respond to emerging circumstances

When there is a need to significantly modify a project plan in line with emergent circumstances, it is common that parallel modifications to the budget will be required. Clear conditions can guide the processes for responsive budgeting.

Options that a funder can use in responsive budgeting include:

- Simplifying the processes used to request and approve moving money between budget lines.
- In a co-applicant model, where each partner is funded separately, articulating a simple process (e.g., invoicing) for moving money between funded co-applicant partners.
- Including a percentage contingency line in budgets.
- Providing access to additional funds, through a clear request process.

They aren't allowing us to provide the whole story of what happened with the project... I am trying to answer questions that they haven't asked me because I want them to have this information.

Include open narrative questions in reporting templates

Allow space in reports for narratives where projects can share more openly about what they have accomplished. An example of this can be including a question such as, "What are you most proud of?" Open narrative questions can provide rich data that funders can use to demonstrate the impacts of their funding. Focussing primarily on quantitative indicators, such as the number of people engaged, can come at the detriment of capturing the value and impact of fewer, yet highly influential people being engaged.

The difficulties with the report are capturing the changes that we feel we have [prompted]... In the form, there is no place to add what is an 'unexpected result' so it is hard to comment on a change of a policy.

Provide space for projects to explain emerging or unanticipated circumstances and the adjustments that they made. This encourages accountability and facilitates the reporting of unexpected results.

Fund and support equitable partnership and participation

The impact of a project can increase significantly when partnership work is grounded in an equity framework as this strengthens the ability of partnerships to drive the systems change they were funded to do.[7]

Earmarking funds for marginalized people and groups is a concrete way to support their participation on a more equal footing as partners in projects and as consulted experts in project work.

In addition to the recommendations to funders below, see guidance for partners on working together from an equity lens, on pages 27- 29 of this toolkit.

Equitable partnership and participation are the intentional and meaningful inclusion of people and groups who have been and/or are being marginalized from the current system and who are most likely to benefit from the intended systems changes.

- Examples of people and groups who are marginalized from power, privilege and resources include (but are not limited to) Indigenous, disabled, racialized, Two-Spirit, queer, trans, rural and remote communities, and women.
- Equitable partnership and participation recognize that that many marginalized people and groups simultaneously experience multiple and intersecting marginalization (e.g., racism and sexism).
- This toolkit uses the term “marginalized groups” to refer to organizations, networks and grassroots groups that represent equity-seeking communities, people with lived experience, and other small equity-focused groups who typically have limited resources.

Fund and support marginalized groups to be core partners in projects

It is harder for partnerships to fully and continuously apply an equity lens to their systems change work when marginalized groups connected to the issue are not among the funded partners. Robust funding of marginalized groups as core partners strategically supports more meaningful and impactful systems change.

In addition to funding, other strategies that funders can apply to support marginalized groups as core partners include:

- Funders can use an equity analysis tool or matrix[8] to

[7] The centrality of equity and innovation to partnership effectiveness is highlighted on pages 193-194 in Bilodeau, A. & Kranias, G. (2019). Self-Evaluation Tool for Action in Partnership: Translation and Cultural Adaptation of the Original Quebec French Tool to Canadian English. *Canadian Journal of Program Evaluation, 34.2* (Fall 2019), 192–206.

[8] Such as Health Nexus. (2016). *Equity Analysis of Group Membership Template*. Health Nexus and Ontario Public Health Association. An excel version of the matrix template is also available.

conduct a retrospective analysis and assess which types of groups have been funded and which have not, in the past. The tool can also be used to target communication plans for new calls for proposals, and to inform the evaluation of new funding proposals from an equity perspective.

- Pre-proposal Q&A, dialogue, and networking sessions (online or in-person) that the funder hosts can be designed to pay attention to and center the voices and needs of participants from marginalized groups.
- Funders can prioritize proposals which meaningfully include one or more core partners that represent marginalized groups. To favour equitable partnership (versus tokenism), funding guidelines can encourage robust budgeting for the participation of marginalized groups.
- Funders can offer more frequent check-ins with marginalized groups who are core partners throughout the project's lifecycle, guided by questions and needs identified by the groups themselves. Funders can also contract third-party partnership coaches to provide such support (see pages 20-23).

Remunerate the meaningful participation of marginalized people as consulted experts

In the initial call for proposals, designate a budget line to cover honoraria and expenses for marginalized people and groups whose expertise contributes meaningfully to the project but who would otherwise receive no compensation for their contributions. Expecting marginalized people and groups to contribute without compensation discourages their participation and reinforces system inequities as it undervalues their knowledge and skills.

Examples of meaningful contributions include: active committee members (e.g., steering or advisory committees), focus group participants, and key informants.

A special budget line can allow for honoraria, food, language interpretation, accessible space, and expense reimbursements related to travel time and costs, childcare, and other items as appropriate.

> ***All these measures make it possible to recognize the expertise of the stakeholders and enhance mobilization. These are avenues for change.***

Allocate wages and professional fees that support fair compensation and pay equity

Much of systems change work towards equity is led by those affected by inequities, and part of this experience usually includes systemic pay inequity in that work. It is recommended that funders reflect and decide on wage scales which allow projects to pay project staff at rates that support pay equity and a living wage. Funders can research what fair compensation is for the different types of roles that projects may request, and can also

For explanations of some common terms used in discussions about equity:

Glossary of Key Terms in *Building Inclusive Governance*, by onBoard Canada include a question in the proposal form for applicants to explain the basis for wages requested. Funders can also set a minimum pay rate that is above minimum wage for all staff costs in project budget guidelines.

Fund training and coaching that supports all partners to work from an equity lens

In any funded project, partners likely bring varying levels of experience of applying an equity lens to their work. To support systems change that is equity-focussed, it is advantageous to offer partners ongoing opportunities to learn and discuss together what it means to conduct their project from an equity-based approach. Funding and opportunities for such interactive training is crucial at the start of proposal development, when relationships and collaborative processes are being established. Follow-up coaching and supplementary training can facilitate reflective practice and an ongoing equity commitment over the life of the project. When such training is required by the funder, it is important that details related to this obligation are shared in the call for proposals. A full list of good practice guidelines, for when funders employ training and coaching providers, is presented on pages 20-21.

Ask projects to report on how they are integrating an equity lens in their work

In reports, funders can ask project partners to share how they are integrating an equity lens into the way they work together, as well as in their collaborations with other engaged stakeholders.

Invite project partners to highlight areas of success as well as challenges being faced. When appropriate, such reporting also provides an opportunity for funders to leverage their networks and resources to support projects with employing an equity lens. For example, a funding program officer might be able to introduce project partners to groups they have not been able to connect with, or direct projects towards valuable resources or third-party coaching services. It is important that funders respond to any challenges shared in a supportive, facilitative and non-punitive way, to strengthen partnership functioning.

While quantitative reporting can share some information related to integrating an equity lens (e.g., Likert scale questions), qualitative questions allow for context and reflection, and can support evaluative learning for ongoing partnership improvement. Relevant examples of open-ended questions include:

- Which groups have been engaged and which, if any, are still missing?
- How have marginalized groups and people been meaningfully engaged, and what could facilitate further engagement and more shared leadership?
- What tools, resources, or training have been used to support the integration of an equity-based lens?

Pages 27 - 29 of this toolkit share guidance and further resources for partners on working together from an equity lens.

Foster environments for meaningful collaboration

Systems, by definition, are specific, entrenched ways of doing things. Changing systems requires strong collaboration to maximize partnership performance and impacts. As noted earlier, collaboration on systems change work excels when it is strengthened over time and when it supports the equitable participation of partners. Successful collaboration also requires an investment of ongoing human and financial resources in building and maintaining the partnership through which project work happens.

Unfortunately, when dollars and time are tied primarily to external deliverables, meaningful collaboration (including connection, planning, and reflection) is often neglected. This can result in misunderstandings, lessened motivation, uneven workloads, chronic tensions, and conflict - delivering reduced performance or, at worst, partnership breakdown. The return on investment is high when funders support partnerships to come together to reflect and plan, and to assess their ways of working together to move forward the project. The strategies in this section outline how funders can foster an environment for meaningful and impactful collaboration.

> ***Funding so that everyone can be together at the same place, allows interaction that is important to keep cooperation going.***

Require and fund project partners to have in-person reflection and strategy sessions

It is recommended that one or two full-day meetings per year are funded over the project's lifecycle, including a session soon after funding is approved and before the project work starts. In-person reflection and planning sessions enhance the adaptive and strategic capacities of project partners to respond to arising needs or context changes, and to take advantage of collaborative opportunities.

For these sessions to be fruitful, funding would cover the costs:

- An external facilitator, so that all project partners can fully participate.
- Any preparation time required by some or all of the project partners.
- Other costs related to meetings, as applicable, such as travel time and expenses, accommodation and meals, meeting room rental and refreshments.

Fund project coordination that matches the demands of partnership work

The human resource requirements for coordinating effective partnership projects can be easily underestimated. Adequate funding for project coordination can reduce stress on partnership functioning and support equity for smaller marginalized groups. A helpful call for proposals will include guiding questions to help projects adequately assess the coordination resources required for core partners to work together while engaging multiple other stakeholders. Whether one coordinator position supports all core partners, or each core partner takes on a complementary coordination role, is best decided among partners during the proposal development stage.

Provide a small pot of funding for the proposal development stage

A lot of work goes into putting together a solid partnership project proposal. When this work is done with funding, it strengthens equitable participation in identifying the issues and context, and in decision-making and planning. All partners can share in the work. Without funds for collaborative practice from the start, partnerships may struggle with early misunderstandings and power imbalances that can delay and potentially damage project performance.

Promote collaboration via reporting protocols

Ask projects to report on their partnership development activities. Ask partners to briefly report on their activities related to collaboration using a mix of quantitative and qualitative measures.[9] As with other reporting, funding program officers can use this information to offer projects accolades and support, as appropriate.

Encourage collaborative reporting, even within a co-applicant funding model. Collaborative writing of narrative reports can deepen shared understanding and bonds among partners. In a co-applicant funding model, where each partner has separate funding and agreements with the funder, parts of the report template can invite collaboration by encouraging core partners to complete and submit those sections together. This also reduces redundancy. If narratives are not written together, partners can still be encouraged to share their individual reports and reflections with each other.

> ***We consider the reports as a snapshot of the reality and not just a matter of writing answers in the boxes.***

Aim to simplify budgeting and reporting processes

Reporting is a necessary and essential part of any funding agreement. It ensures accountability, provides guidance, and acts as a communication bridge between the funder and its funded projects. Meanwhile, for many small organizations, financial reporting is resource-heavy and burdensome work that takes away from project work. A funder's need for streamlined and systematic reporting relative to a projects' need for organic reporting that doesn't drain energy and resources from project collaborations and deliverables makes for a tough balancing act.

With an aim to simplify budgeting and reporting processes, explore what aspects can shift to accommodate both parties' needs, especially to address known trouble spots. Some questions to explore might be: Can quarterly and interim reports be further simplified? Can interim reporting be reduced to a semi-annual or annual requirement, bridged by a planned phone conversation scheduled midway between reporting periods? Can the process of carrying unspent money into the next reporting period be simplified? Can budgets be set up to flex the 'spend-by' date? Within a co-applicant funding model, can there be a way for one core partner to transfer funds to another, if needed to match any project adjustments?

Communicate intentionally with projects

It benefits the projects and the funder when the funding program officer maintains an engaged connection with its funded projects. This includes initiating contact with projects, acknowledging and replying to communication from projects, as well as sharing feedback with the projects via phone or email regarding their submitted reports. It can also be useful to preschedule check-ins with projects to address any arising issues, to celebrate successes, and to review upcoming reporting requirements.

[9] For example, a funder's reporting template might prompt responses in relation to the six activities for successful partnerships outlined and discussed in Health Nexus. (2018). *Partnership Essentials*. A figure outlining the six activities is on page 25 in this toolkit.

Fund third-party support services that nurture meaningful collaboration

An innovative way that a funder can champion the collaboration required for systems change work is by making third-party support services available, at no cost, to its funded projects. These services would be paid for by the funder but operated by an independent consultant or organization whose day-to-day work is not controlled by the funder, nor by the projects served.

Funders who fund partnership projects already realize that impacts can be achieved when multiple stakeholders act together. Investing in third-party support services for projects gives partners an extra edge to successfully leverage their collective resources and expertise for impact. For partnerships that are already high performing, these services can increase the return on a funder's investment by amplifying the partnership's synergy to advance systems change even further.

This section outlines three types of third-party support services that can each support funders in the quest for maximum funding impacts. These are: virtual meeting platforms (page 21), partnership coaching (page 22), and conflict mediation (page 23). The services are suggested with an understanding that good practices and the vital information to communicate, discussed in the following sections, are integrated into how funders provide any third-party support services.

Follow good practices when employing support services

Have services available to core partners from the call for proposals phase until the end of the funded projects. If services are added after project proposals have been submitted, it is recommended that the funder provides additional dollars to funded projects in order to ensure they have appropriate staffing and other needed resources to take advantage of the services offered.

Ensure services are available in the primary languages that projects will use to communicate with the funder or that projects are funded to work in. When this is not possible, a funder can offer supplementary funding to projects for covering any necessary translation and interpretation costs.

Evaluate needs and procurement options for services. Third-party support services can be provided through a purchase of services by the funder or by funding the services as its own project. In contracts, it is critical to consider and clarify how deliverables will be monitored, as well as the degree of independence that a service provider will have to respond to emerging needs of the projects. For funders serving a large geographic area, evaluate the pros and cons of contracting one central service provider versus regional providers.

Communicate early with funded projects. Not surprisingly, funded projects can struggle to understand roles, opportunities and expectations in relation to non-conventional third-party service providers. It is critical for the funder to communicate fully about what projects can expect regarding third-party support services. Early on, funders can facilitate communications channels to ensure all questions from projects are clarified by the providers.

Facilitate coordination when employing multiple providers. If more than one provider is employed, to support better coordination, it is recommended that the funder bring all third-parties together (virtually or in-person) to create a document that outlines who does what, as well as how the parties will coordinate and communicate their work to benefit and not burden the funded projects.

Communicate vital information to projects about the support services available

As noted above, it is strongly recommended that the funder makes as much information as possible available to projects about third-party support services at the call for proposals. If projects will be required to engage with a third-party support service as part of the funding agreement, it is critical that this is explained clearly in the call for proposals along with the rationale for the requirement.

Below is a summary of the information that projects need to know as early as possible:

- **Details of the services,** including what services are available, how to request and access services, and when and where services are available. Provide concrete examples and testimonials of benefits the services can bring to projects, to encourage early uptake.
- **Funder expectations related to how projects use third-party services**, including to what degree the use of the services is mandatory or optional, what projects will have to report to the funder (if anything) about their use of services, and whether projects will be able to provide feedback directly to the funder about the services.
- **Any costs (i.e., financial and human resources) to be covered by the projects.** While third-party service provision may be offered at no charge to projects, project partners can incur costs in accessing services (e.g., time and travel to reach the service location). Detail any associated costs that projects are expected to cover and how the funder expects these costs to be covered.
- **Funder's relationship with the support service provider(s)**. Projects need to know what accountability any third-party service has to the funder, as transparency will foster trust. It is recommended that third-party support services have a confidential relationship with the projects and that any reporting from services to the funder does not include details that would identify projects. In their contracts with third-party support service providers, funders can identify appropriate details for the third party to report on, i.e., types of services, number of services, hours of service, etc.

Fund virtual meeting platforms for partnership collaboration and project work

With advances in technology, the costs of virtual meeting platforms are decreasing rapidly, but they can still be prohibitive to partners representing small organizations and marginalized groups. Free versions of these virtual meeting platforms often have limited features, including limits to the number of meetings, the number of participants, and the length of meetings. A small investment by the funder can yield significant impact on the success of funded partnership projects.

In between face-to-face meetings, virtual platforms can support collaborative processes within partnerships and serve as an additional means for engaging other stakeholders in the project's work - with voice, video, document-sharing, polls, etc.

It is recommended that the funder:

- Research which platforms are currently used and preferred by the groups and sectors that will be funded, to build from current capacity.
- Make the virtual meeting platform service(s) available to partnerships from the call for proposals period through to the end of project funding.

- Specify which virtual meeting platform(s) will be provided at the call for proposals stage, as this may have cost implications for project budgets (e.g., high-speed internet, technology, as well as training costs).
- If the funder will not provide this third-party support service, indicate where virtual meeting platform costs are eligible within a project's budget proposal.

Provide third-party partnership coaching services to maximize collaboration

Partnership coaching services can offer a variety of supports to partnerships such as individual coaching, facilitation of collaborative reflection and strategy sessions, as well as group training and inter-project exchanges (either remote or in-person). Effective partnerships for systems change intentionally seek out a diversity of partners, which in turn can present challenges.[10] Good partnership coaching can ensure partners bridge differences, promote equitable partnerships, and collectively innovate to overcome project barriers. It also assesses and responds in flexible and timely ways to the priority needs of project partners.

Key support services that third-party partnership coaching can provide to projects, to maximize their performance as collaborative teams, include:

- Support partners in understanding the essentials for effective partnership work and identifying how their own challenges may reflect what is typical in partnership work contexts.
- Guide partners to think through and develop strategies to sufficiently engage and involve a range of stakeholders from the start.
- Facilitate relationship development, especially when a partnership is emerging from suggestions or a requirement by the funder.
- Guide core partners through activities that deepen shared understanding and support the creation of a shared project vision during the request for proposals stage.
- Support the integration of participatory and developmental evaluation, as appropriate, into project design.
- Coach partnerships in the development of collaborative decision-making processes, including steps to deal with conflict, as well as clear role descriptions and synchronized workplans.
- Facilitate dialogue and bridging when partners face difficulties stemming from different organizational cultures, differing accountabilities, divergent approaches to equity and inclusion, or other areas that can create internal conflict. Recommend conflict mediation when appropriate.
- Help projects figure out how to best support involvement and leadership from marginalized groups.
- Design and facilitate high-level reflection and strategy activities at annual in-person meetings, and for requested special topics such engaging other stakeholders, adapting to unexpected circumstances, or planning for sustainability.
- Make periodic check-in phone calls with individual partner organisations to facilitate individual reflection on project achievements and needs, and to allow for confidential conversations regarding partnership relationships and any issues arising.
- Identify priority topics related to partnership work and facilitate dialogue or training opportunities (in person or online) for project partners seeking new perspectives, skills and tools.

It is recommended that the funder:

- **Launch partnership coaching services during the call for proposals** and make them available through to the end of the funded projects.

[10] Health Nexus. (2020). *Partnership Projects for Systems Change on Gender Equity: A Snapshot of Key Learnings*. Health Nexus – Nexus santé. p.9

- **Ensure coaches embody an equity-based approach** and have strong experience supporting collaborations in integrating and working through an equity lens.
- **Offer services, when possible, through regional coaches.** This can facilitate more nuanced and context-relevant support to projects and strengthen connections and knowledge exchange among regional networks thus boosting the capacity of projects to implement systems changes. Regional coaches may be more available to provide in-person support.
- **Require coaches to be flexible and responsive to the needs of the funded projects.** In contracts, outline expectations for partnership coaching services to collect feedback, analyse partnership support priorities and communicate related offerings to projects. Consider whether an advisory group with representatives from each project would be beneficial. If so, communicate this to projects at the call for proposals stage.
- **Avoid significant investments in the production of new documents** about partnership topics, since most partners find themselves too busy for in-depth reading.

Provide third-party conflict-mediation services to protect against partnership breakdown

Focus, productivity, and the fulfillment of deliverables suffer if funded partners are constantly struggling to function as a team. In cases where funding program officers are unable to provide sufficient mediation support, or partnerships are averse to approaching the funder, third-party conflict mediation can be a lifeline.

- If partnership coaching is not an included service to projects, require conflict mediation services to provide resources, coaching and training in conflict management understanding, planning and strategies. Such capacity building can help prevent or mitigate partnering difficulties.
- From the start, outline to projects what process conflict mediators will use (if any) to access information about the partnership conflict from the funder and, if relevant, from partnership coaches.
- Ensure that conflict mediation services can be provided to one or more partners, even if all project partners are not in agreement on accessing the services.

Recommendations to Partners

The recommendations in this section draw attention to and share tools for essential aspects of partnership work for systems change for equity. These recommendations work best and are most easily supported when funders provide concrete investments towards their implementation (see Recommendations to Funders on page 10-23). It is common for project partners to underestimate the time, human and financial resources required for effective systems change projects. These recommendations can help partners better prepare for and optimize their collaborative relationship-building, planning, action and reflection activities.

Developing collaboration between partners requires time that should not be overlooked; it is a structural investment.

Invest early and continuously in the partnership

Preparing for collaboration and investing in partnership maintenance are fundamental to maximizing performance and impacts. Successful partnerships invest early and continuously in themselves through connecting, fostering understanding, creating a shared vision, planning collaboratively, working together for change, and reflection. Health Nexus' resource *Partnership Essentials* explains these six key activities and provides strategies, tools, and further resources for partnerships to use.

How partners plan and work together sets the tone for how the work to meet project deliverables will unfold.

Figure: 6 activities for successful partnerships

Acknowledge and address differences among partners

Differences among project partners can exist at individual, organizational, or group, levels. Areas of difference can include social location and power, work culture and practices, capacities, communication styles, governance structures, and more. Differences can strengthen a partnership when they are seen as assets, and when partners take early action (and, if required, continuous action) to bridge them.

When differences threaten to weaken a partnership, here are some strategies partners may use to address them:

- Overcome any reflex to compete or withdraw.
- Inquire about differences and explore options.
- Agree to clear processes and strategies for how conflicts will be discussed and managed.
- Call on external supports, such as an experienced facilitator, to lead the group through appropriate sharing, reflection, and bridging activities.
- Ask the funder to adapt timeline or resource allocations, if such changes could help bridge challenging differences.

Sometimes, partnerships learn about other related projects happening alongside theirs. In these cases, similar recommendations apply. A spirit of curiosity can go a long way in bridging and aligning parallel projects, to leverage more resources and power for desired systems change.

> ***Invite other groups [who also work in the field] to the table instead of having a competition - especially those where there is the possibility of conflicts and tensions. It is important to talk together.***

For simple tips on fostering shared understanding:

Page 8 in **Partnership Essentials**.

Work together from an equity lens to enable equitable partnership and participation

Inequity is not only a dynamic in the broader systems a partnership may seek to change, it is also a dynamic within any partnership. Working together from an equity lens can strengthen a project's impacts on systems change.[11]

Intentionally include core partners who identify as or represent marginalized groups connected to the issue

From the start, it is strongly recommended that potential partners considering a call for proposals reflect on which groups are and which are not represented among their included project partners. Tools such as the *Equity Analysis of Group Membership: A CLiP Template* (and excel version of the matrix template) can help to highlight strengths and gaps in the representation of marginalized groups relevant to a project. Inclusion goes beyond membership and extends into meaningful participation, of which the early involvement of partners is a contributing factor.

Once potential groups have been identified, the *Partnership Conversation Starter: A CLiP Template* (and its excel version) can help guide dialogue about options for involvement or partnership. As this resource notes, "Clarifying types of community involvement promotes equity. It can also improve results…"[12]

Equitable partnership and participation are the intentional and meaningful inclusion of people and groups who have been and/or are being marginalized from the current system and who are most likely to benefit from the intended systems changes.

- Examples of people and groups who are marginalized from power, privilege and resources include (but are not limited to) Indigenous, disabled, racialized, Two-Spirit, queer, trans, rural and remote communities, and women.
- Equitable partnership and participation recognize that that many marginalized people and groups simultaneously experience multiple and intersecting marginalization (e.g., racism and sexism).
- This toolkit uses the term "marginalized groups" to refer to organizations, networks and grassroots groups that represent equity-seeking communities, people with lived experience, and other small equity-focused groups who typically have limited resources.

[11] The centrality of equity and innovation to partnership effectiveness is highlighted on pages 193-194 in Bilodeau, A. & Kranias, G. (2019). Self-Evaluation Tool for Action in Partnership: Translation and Cultural Adaptation of the Original Quebec French Tool to Canadian English. *Canadian Journal of Program Evaluation. 34.2* (Fall), 192–206.

[12] Health Nexus. (2016). *Partnership Conversation Starter: A CLiP Template.* Health Nexus and Ontario Public Health Association. p.2

Talk together about what equitable partnership and participation mean

It is likely that partners will have both varied and overlapping experiences and understandings of working with others equitably. Partners might have a mix of lived experiences with different types of intersecting marginalization and formal education or training related to equity frameworks. Some may have limited or no experience. It is important that partners set aside time early in their project planning to have meaningful conversations about equitable partnership and participation.

Take care to articulate:

- Organizational and personal experiences and worldviews with respect to equity and marginalization.
- Preferred approaches for practicing allyship among partners and demonstrating solidarity to any partners who experience backlash and/or discrimination during a project.
- Both strengths and gaps in knowledge and experience, as well as possible challenges that may arise, in applying equity approaches.
- Preferred resources and tools for guiding and assessing equitable partnership and participation.
- Experiences and thoughts on engaging with groups who have less power (e.g., other stakeholders, lived experience communities).

These conversations will naturally start to highlight the characteristics of an equity framework that will best work for the partnership.

For any partner seeking to strengthen equity and inclusion within their own organization:

Building Inclusive Governance: A Toolkit for Not-for-profit Boards and Organizations by onBoard Canada

For explanations of some common terms used in discussions about equity:

Glossary of Key Terms in *Building Inclusive Governance* by onBoard Canada

Develop an equity framework together that will guide the partnership

It is valuable for partnerships to reference existing equity and inclusion resources and tools as they develop their own tailored equity framework to meet their unique needs.

Some relevant equity and inclusion approaches that can be explored to amplify and centre the voices of marginalized communities include:

- **Intersectional feminist framework (IFF)**

  See *Intersectional Feminist Frameworks: An Emerging Vision* by Canadian Research Institute for the Advancement of Women.

- **Equity and inclusion lens**

  See *Equity and Inclusion Lens Handbook: Community Resource* by City for All Women Initiative.

- **Anti-racism anti-oppression (ARAO)**

  See *Becoming and Ally in Partnerships: From Intent, to Reflection & Action* slides by Lauren Burrows for the Collaborative Leadership in Practice Project, Health Nexus and Ontario Public Health Association.

- **Gender-based analysis plus (GBA+)**

  See *What is Gender-based analysis plus?* by the Government of Canada.

While the approaches just described include Indigenous communities among those groups to highlight in an equity framework, resources developed by Indigenous authors and Indigenous-led organizations are important readings for any settler-led groups and partnerships.

Suggested resources include:

- *Indigenous Ally Toolkit* by Montreal Urban Aboriginal Community Strategy Network.
- *Approaching reconciliation: Tips from the field* Editorial by Janet Smylie in Canadian Journal of Public Health (July/August 2015).

A partnership's chosen equity framework becomes an important guide for partners in their daily work together, and an important reference point during partnership reflection, evaluation and planning sessions.

Here is an example of an equity framework developed by partners in Brant County, Ontario: *Principles of Collaborative Leadership Towards Equity.*

For a short reflection on equity and inclusion dynamics in partnerships:

Page 5 in **Partnership Essentials**

Design the project plan and evaluation plan together

How potential project partners respond to a call for proposals is determined by numerous factors. These include the timing of the call, the capacity of interested parties to respond, and their history of (or lack of history) working together. Often, there is no funding for the work of submitting a proposal and organizational resources are stretched during this period.

Leadership of a partnership-based project can sometimes be assumed to lie with the partner who contributed the most resources designing the submission, or with the partner positioned as "project lead" when a lead role is required by the funding model.

Projects emerge stronger under circumstances where project partners have:

- Spent time connecting with each other, acknowledging differences, and understanding each other's capacities.
- Developed a shared vision and equity framework to guide the partnership.
- Ensured a voice for marginalized groups from the start, as the project is being shaped.

It is most advantageous when project partners find ways for all partners to be meaningfully involved in designing the goals, activities, deliverables, evaluation, and overall project workplan, while respecting each partner's self-identified capacity to contribute. Codesigning plans sets a collaborative tone from the start, favours equitable participation of marginalized groups, and supports early bridging of partnership differences.

Consider each partner's strengths and resources to contribute to the project plan

Still through an equity lens, while designing the project plan, it is recommended that partnership teams learn about and note each partner's unique capacities to contribute to the project.

A thorough consideration will reflect at least five areas, as outlined in the *Partnership Contribution Matrix (*a Word document for mapping contributions):

- Social capital.
- Information and knowledge.
- Human capital.
- Physical capital.
- Financial capital.

Having early and clear knowledge of each partner's capacities helps partnerships better allocate roles and responsibilities, refine decision-making processes and coordinate project activities.

For more tips on planning collaboratively:

Page 9 in **Partnership Essentials**

Additional considerations include: whether the representative for each partner will be the same person(s) through the life of the project; what type of independent decision-making power the representative for each partner has; and how geographic distance between partners, as well as geographic scope of the project, will affect collaboration.

Use participatory and developmental evaluation to enhance strategic planning and project impacts

The strengths of participatory evaluation and developmental evaluation approaches for partnership project contexts are introduced on page 12 of this toolkit.

Most basically, using participatory and developmental approaches requires the following:

- Maximize the diversity of stakeholders involved in evaluation design and data analysis.
- Favour participatory data collection and analysis methods through which all partners can deepen their collective appreciation for process dynamics and project impacts.
- Plan for cyclical evaluation activities and adjustments via feedback loops throughout the lifetime of the project, in contrast to "book-end" research at the beginning and end of a project.

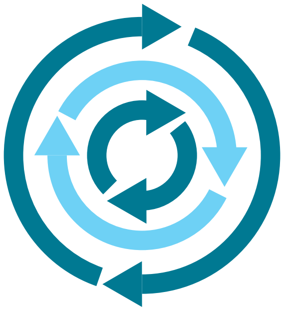


Figure: Cyclical evaluation activities

These questions, adapted from Health Nexus' *Participatory Evaluation Toolkit*[13] can guide partners in designing their evaluation plans, including timelines:

a) Which stakeholders can contribute to the evaluation design and how will we consult them?

b) What do stakeholders (including funders) want to learn?

c) Based on stakeholder interests, and resources available, which key question(s) and indicators should guide the evaluation?

d) What information-gathering techniques will be most valuable, and inclusive of historically marginalized groups, and when and how will we conduct these activities?

e) When and how will we discuss and analyze the information collected, foster alignment on conclusions, and identify actions to take based on developmental learnings?

f) When and how do we decide whether to keep or adapt our evaluation question(s), indicators and activities for the next (semi-annual, annual, or other) evaluation cycle?

When designing the project evaluation, schedule periodic full-day reflection and strategy meetings among partners, preferably in-person. Such meetings provide structured time for partners to review and reflect on their project achievements and challenges, to brainstorm and strategize, and to make informed revisions to partnership collaboration activities as well as the overall project plan. These sessions can fall at the end of project phases, after major project events, as well as or at regular calendar intervals (e.g., annually).

When identifying indicators for measuring progress, be certain to include process indicators specific to collaborative work (refer to further resources on this page), as well as outcome indicators[14] related to systems change outputs or impacts.

[13] Health Nexus. (2018). *Participatory Evaluation Toolkit*. Health Nexus. p. 7

Stay flexible through emerging circumstances

Partners doing systems change work often encounter unexpected or emerging circumstances that can require the adjustment of workplans, strategies, or even direction, in order to continue pursuing their shared project goals. Having timely conversations about shifting contextual realities is valuable – at the start of the project, during regular partnership reflection and strategy meetings, and as needed when influential changes happen.

> ***Sharing our strategies between [partners] is very profitable for all of us… Longer process, but more tangible, effective, better results… Building solidarity in the sector…***

Notable macro-level circumstances that can emerge, outside of a project's control, which may require partners to reflect and adapt their project plans, are enumerated on page 13.

Additionally, partners can benefit from open dialogue and collaborative strategizing when the following types of circumstances emerge:

- New collaboration, or conflict, with outside stakeholders that can amplify, or impede, the project's systems change capacity and impacts.
- Unexpected administrative or human resource predicaments faced by one or more project partner(s), such as staff turnover or funding cuts.

Using a participatory and developmental approach to evaluation can ensure that structures are in place for a flexible and strategic response to changing circumstances (developmental approach) and that diverse stakeholder perspectives are heard when key questions are being identified, situations are being analyzed and project adjustments are being planned (participatory design).

For participatory data-gathering and collective analysis techniques that are well-suited for partnerships with limited evaluation resources:

Partnership Assessment Wheel, in appendix on pages 37 provides simple evidence-based indicators for evaluating partnership processes, and simple steps for a 2-3 hours participatory reflection activity.

The Power of Reflection: An introduction to participatory evaluation techniques

Participatory Evaluation Toolkit

[14] Helpful references for identifying indicators include: process evaluation suggestions on page 11 of *Partnership Essentials*; and definitions of 'intermediate outcomes' in partnership work, from Bilodeau A., Lefebvre C., Galarneau M., & Potvin L. (2018). Quels sont les effets de l'action intersectorielle locale sur les milieux de vie et comment sont-ils produits? *Le Point sur... l'action intersectorielle, no4*. Centre de recherche Léa-Roback. (Their 'intermediate outcomes' factsheet is forthcoming in English in 2020).

Budget more resources for collaboration

Partnerships that find themselves short on resources for collaborative work encounter many challenges which can compromise, to varying degrees, the effectiveness of their systems change efforts. When designing a budget to submit with the project proposal, it is prudent to include a robust calculation of resources for partnership collaboration.

For each partner, budget additional staff time and other required resources for preparing, coordinating, and implementing:

- Clear processes and protocols for working together.
- Regular meetings among project partners.
- Building collaborations with new groups or partners.
- Engaging communities (including additional resources for honoraria, meals, travel, and childcare for marginalized groups who experience barriers to participation).
- Project communications.
- Special events.
- Management of project finances.
- In-person sessions to address periodic or even unexpected collaborative work needs, such as strengthening shared understandings and plans, mid-project strategizing, sustainability planning, bridging partner differences, etc. (such sessions may require resources for paying an outside facilitator as well as budget for in-person meeting expenses).

Clear processes and protocols for working together, along with regular meetings among partners, ensure smooth project coordination. It is valuable for partners to identify their plan for project coordination together as the project proposal is developed, and to revisit the plan shortly after funding has been confirmed.

The following considerations are relevant to developing a project coordination plan:

- Whether there will be one coordinator for the project or if the role will be shared across partners.
- How accountability to the project by the coordinator(s) will be managed, i.e., who is legally responsible for their employment including any human resources management, who provides strategic guidance and feedback, and who guides or supervises the workplan(s) of the coordinator(s).
- How each partner may be involved in the hiring process, as well as in supporting and evaluating the performance of the coordinator(s).
- How the coordination role will support the partnership, i.e., whether the coordination focuses on the external work of the partnership or whether it also includes internal facilitation and relationship-building to keep the partnership team strong.

For guidance on working together for change, as well as sustaining and improving the partnership:

Pages 10-11 in **Partnership Essentials**

Communicate intentionally with the funding program officer(s)

Funding program officers can be an important resource when projects are able to build a positive relationship with them. It can be valuable for partners to intentionally discuss and decide together: who will maintain communications with the funder(s), objectives for the relationship(s), and how the desired relationship(s) can be fostered. Who communicates with funding program officer(s) for a project may depend on how the project is funded (e.g., separate agreements with each partner versus one agreement for the entire project).

It is recommended that projects make early contact with their funding program officer(s) to foster a personal connection, to clarify expectations and to advocate for project needs. This can be done by one representative of the partnership or together through a special joint meeting.

Useful questions to explore may include:.

- Communication preferences (phone or email).
- Typical time intervals for responses.
- Typical guidance available.
- Restrictions and levels of flexibility regarding unexpected needs or changes in projects.
- Processes for approving any requests for budgetary changes, i.e., transferring between budget lines, budget carry-over.
- Typical responses provided after submitted reports.
- Availability to meet (by phone and/or in person).
- Options for support if the partnership is stalling or struggling.

Partners can later consider the benefits and potential drawbacks of inviting the funding program officer(s) to other project meetings or reflection sessions.

Projects may also want to advocate for some of the recommended actions from the Recommendations to Funders section of this toolkit (see p10-23), if such approaches are not already part of the funding model.

Consider third-party support services to maximize collaboration

Some projects may include in their initial budgets to hire outside consultants for specific project roles or tasks. In other cases, funders can provide third-party support services operated by an independent consultant or organization, whose day-to-day work is not controlled by the funder nor by the projects served. Employing third-party support services can strengthen partnership synergy to advance systems change.

Three main types of third-party support services to be considered by partners are:

- Virtual meeting platforms.
- Partnership coaching.
- Conflict mediation.

For a discussion of these services and their potential benefits, see pages 21-23.

It is important to keep in mind that, in addition to payment for the third-party support services (whether by initial project budget or through funder provision), projects will also need to budget for the costs of each partner's preparation for and participation in related meetings (e.g., staff time, travel expenses).

Final Thoughts

Dominant education and funding systems in Canada emphasize work in competition instead of work in partnership. Optimizing partnerships for systems change requires new ways of working, and new approaches to funding can support such ways.

Better understandings and practices emerge and solidify through collaborative work, learning and reflections. This toolkit shared recommendations based on a three-year analysis of the collaborative work, learnings and reflections of 18 organizations working for change in diverse regions of Canada. For more details on this evaluation research, see Health Nexus (2020). *Partnership Projects for Systems Change on Gender Equity: A Snapshot of Key Learnings*.

This toolkit, the many resources referenced within it, and other helpful resources for partners and funders are available on Health Nexus' website at www.healthnexus.ca

List of Appendices

A) Partnership Assessment Wheel

B) Step by Step Instructions for Partnership Assessment Wheel Reflection Activity

C) Three Approaches to Evaluation

Partnership Assessment Wheel*

F Are there **partnership arrangements** in place that help **build collective, rather than invidual action?**

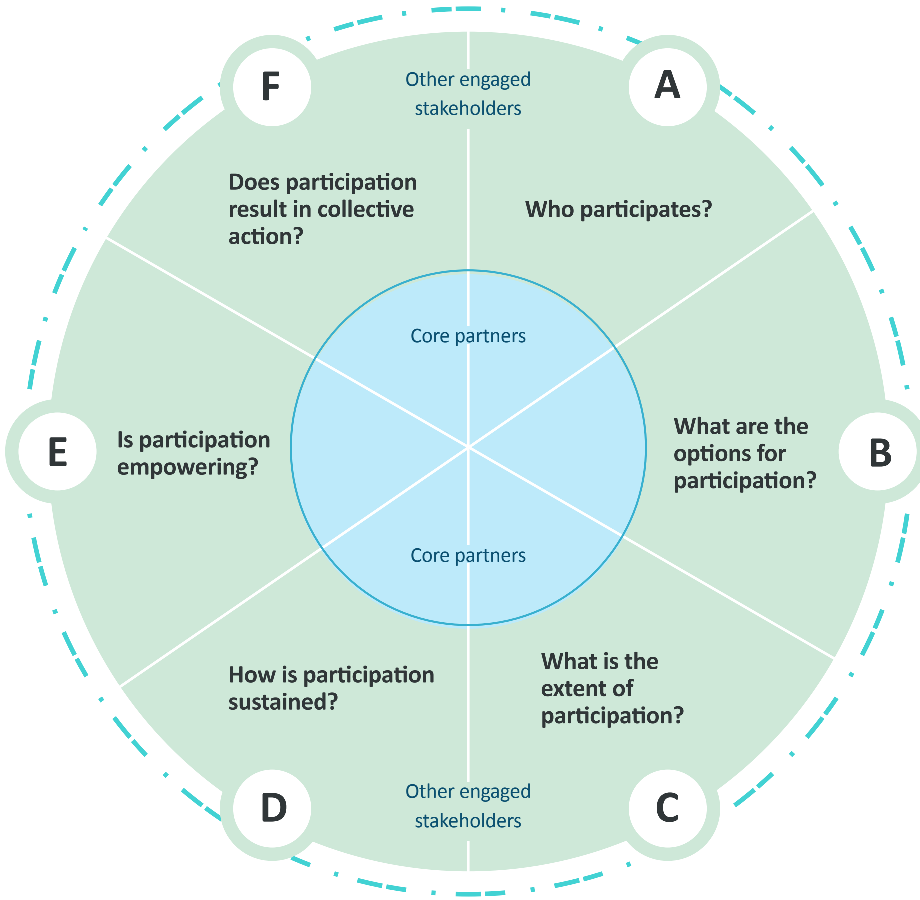
- The exchange of diverse points of view expands possibilities for action
- Partners are able to identify their disagreements and discuss them
- Partners succeed in resolving their disagreements
- Partners can move beyond their own interest to find common ground in the interests of the populations they serve
- Partners mobilise around new, holistic options for action that go beyond simple coordination of each partner's action
- Partners modify their activities (what they do) in order to acheive common project goals

E Does the partnership **intentionally work to equalize power among actors?**

- All points of view are given equal consideration in discussions and in decisions
- Everyones' part in carrying out activities is acknowledged equitably
- Partners benefit equally from the partnership
- The criteria and mechanisms for accountability (reporting) are negotiated between the funders and funded organisations

D Are all actors **consistently in a position to contribute sufficient resources** (e.g. staff time $$, capacity, ect.) to support projects for their full duration?

- Partners are in a position to make decisions and commit resources
- Partner organisations continue to work together for the full duration of projects
- Essential resources for successful action are mobilized
- Earlier partners succeed in bringing in the new partners they need to move forward in bringing in new stakeholders it needs to move forward



A Does the participation include a **comprehensive range of actors?**

- Actors connected to the issue and its options for action are included as partners
- People with lived experience of the issue actively participate

B Do **actors participate in developing options for action** vs. options for implementation only?

- Partners are actively involved in analysing issues and developing options for action, not in implementation alone

C Are the actors **with the least power continuously engaged** in negotiating and influencing decisions?

- All core partners have influence on decision making regardless of their size, funding and status
- Among other engaged partners (e.g., at consultations, in committees), community groups have as much influence on decisions as institutionally recognized voices

* Health Nexus' partnership support team developed this wheel to facilitate participatory reflection among partners. It is adapted from the *Self-Evaluation Tool for Action in Partnership* (Bilodeau et al., 2017).

The development of this wheel was funded through the Women's Program of Women and Gender Equality Canada.

Suggested reference for this wheel: Fursova, J., Boulet, S., Goodluck, M., & Kranias, G. (2018). *Partnership Assessment Wheel*. Health Nexus – Nexus santé.

Step by Step Instructions

for Partnership Assessment Wheel Reflection Activity

Materials needed: Individual wheel for each participant (print on 11x17 if possible), sticky dots or markers for coding (red, yellow, green and blue), sticky notes, large version of the wheel drawn on flipchart or wall poster.

Description of the Steps

Step 1. Introduce the Wheel

This wheel is an adaptation of the *Self-Evaluation Tool for Action in Partnership* by Bilodeau et. al. (2017). It transforms the evidence-based indicators from that tool into a participatory reflection activity for partnership members.

The wheel's circular shape references holistic knowledge traditions. It also allows for visual 'mapping' of the evaluation to support collaborative reflection, strategizing and planning.

Step 2. Clarify the Specific Context

Collectively, identify the actors on your project wheel:

- Core partners (inner circle of the wheel).
- Where applicable: who are the other engaged stakeholders? (extended circle of the wheel).

Step 3. Individual Reflection

Reflect on, and assess, each segment using the coloured dots or markers:

Individually, using the Partnership Assessment Wheel sheet, assess the work of your partnership in relation to the questions for each segment:

- Within the core partnership circle.
- Within the extended partnership circle.

Green
The partnership is strong on the requirement. Your answer to the question corresponding with the segment of the wheel is **"Yes"**.

Yellow
The requirement could be further strengthened. Your answer to the question corresponding with the segment of the wheel is **"Somewhat"**.

Red
There are significant challenges with meeting this requirement. Your answer to the question on the segment of the wheel is **"No"**.

Blue
You cannot provide input due to a lack of information (e.g., you are a new staff person, or have little involvement in this particular aspect).

Step by Step Instructions

for Partnership Assessment Wheel Reflection Activity

Step 4. Reflect in Pairs

In pairs, share your assessment with each other.

a) Reflect together: What differences or similarities draw your attention?

b) Discuss examples that illustrate your ratings.

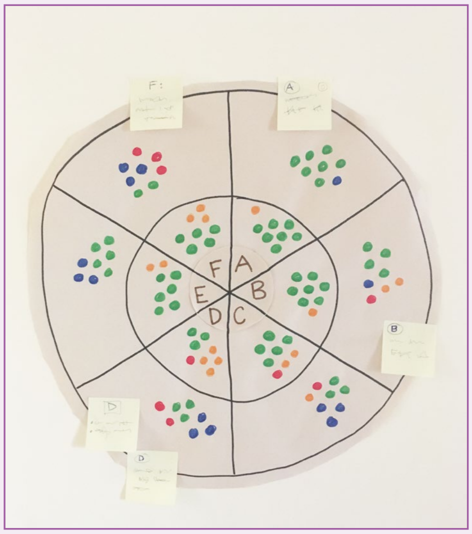
c) (Optional) Choose two examples to record on sticky notes:

- One example illustrating a green dot;
- One example illustrating a red or yellow dot.

Step 5. Transfer the Dots

Next, gather the data. Copy all the dots from individual reflection sheets onto the large flipchart or poster copy of the wheel. A facilitator can be assigned to assist with this.

Add the sticky note examples to the respective segments of the wheel.



Step 6. Analysis

Collectively, participate in an "at a glance analysis" and discuss the illustrative examples.

For ideas on how to guide this analysis, see pages 4-5 in *The Power of Reflection: An introduction to participatory evaluation techniques*.

Explore what the wheel can reveal.

Step by Step Instructions

for Partnership Assessment Wheel Reflection Activity

Action Planning to Strengthen the Partnership

These next steps (numbers 7 to 10) are optional and can be adapted.

Step 7. Choose a Focus for Improvement(s)

Collectively, highlight 1-2 segment(s) of the wheel where change is possible in a given period (e.g., within three months or the coming year). Facilitate a go-around so that all partners' views are heard.

Which segment(s) call(s) for attention?

- For example: there is a lack of consensus on how well the requirement is being met, or there is consensus among partners that this aspect of the partnership needs strengthening.

Within which segment(s) is change "doable"?

- With some attention, plans and necessary resources can be directed for the desired improvement(s).

Step 8. Brainstorm Partnership-Specific Objectives

Individually (or by pair/table for larger groups), come up with examples of partnership-specific objectives, in relation to the chosen segment(s), that illustrate: *what will positive change look like?*

- Write one idea/item per sticky note.
- Decide which sticky notes you prioritise to share first (round 1), then again, (round 2) and so on, until all the notes are posted.

Step 9. Agree on Objectives

Collectively, identify partnership-specific objectives:

- A designated person can facilitate each individual/pair/table to read and posted their proposed objectives (in rounds).
- Review and arrange the proposed objectives into groupings.
- Choose a title for each grouping, so that each group becomes one partnership-specific objective.
- Edit so that the list is focussed and manageable

Step 10. Wrap-up

Collectively, discuss:

- What actions can we take to reach the desired change?
- Who will coordinate?
- How and when will we monitor progress and adjust plans?
- Should we consider using the wheel reflection activity again (for example, in a year's time)?

Three Approaches to Evaluation

Conventional	Developmental	Participatory
For funders and/or managers	**For communities**	**By communities**
Prioritizes measurements and judgment	Prioritizes learning and innovation	Prioritizes collaborative action
Is focused on results and cost-effectiveness	Is focused on learning and knowledge development	Is focused on equitable sharing of power in decision-making
Is added at the end of a presumably linear process	Is integrated as part of a non-linear process and is sensitive to complexity	Is integrated as part of an action-reflection cycle
Is carried out by external experts	Is facilitated by external or internal experts	Is facilitated by communities as part of collaborative learning and action