APPROACHES TO PARTNERSHIP MEASUREMENT

A Landscape Review

MOMENTUM Knowledge Accelerator

AUGUST 2021

MOMENTUM works alongside governments, local and international private and civil society organizations, and other stakeholders to accelerate improvements in maternal, newborn, and child health services. Building on existing evidence and experience implementing global health programs and interventions, we help foster new ideas, partnerships, and approaches and strengthen the resiliency of health systems.

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ABBREVIATIONS

CDC	Centers for Disease Control and Prevention
CLA	Collaborating, learning, and adapting
FP	Family planning
LMICs	Low- and middle-income countries
MEL	Monitoring, evaluation, and learning
MNCHN	Maternal, newborn, and child health and nutrition services
MOU	Memorandum of understanding
MSC	Most significant change
NGOs	Non-governmental organizations
PPA	Public-private alliance
PPE	Public-private engagement
PPP	Public-private partnership
PSE	Private-sector engagement
RH	Reproductive health
SNA	Social network analysis
TOC	Theory of change
USAID	U.S. Agency for International Development

EXECUTIVE SUMMARY

The purpose of the landscape review of existing measurement approaches, frameworks, and metrics utilized to measure partnerships is to inform the selection of evidence-informed, appropriate, and feasible measurement indicators to monitor partnerships within the MOMENTUM consortium. More broadly, the analysis provides an overview of the current state of partnership measurement and commonly utilized approaches including, but not limited to, global health and maternal, newborn, and child health and nutrition, voluntary family planning, and reproductive health.

The analysis reflects a review of more than 170 academic and gray literature resources on partnerships and partnership measurement. Existing publications were reviewed and analyzed for relevance to the landscape review's objectives, and key themes were synthesized into strengths, weaknesses, gaps, and implications for MOMENTUM.

The landscape review found that while calls for partnership measurement are increasing in the literature, there is no standard approach or set of indicators that have been developed to guide partnership measurement. Previous studies found that most partnerships use compliance or process indicators that are not well linked to intended partnership or project outcomes. Measurement challenges—including the complexity of partnerships, rapid changes over time, difficulties in determining intangible outcomes, and lack of monitoring and evaluation capacities—may limit the ability of organizations to evaluate outcomes and the value-add of partnership approaches.

A range of resources have been developed to strengthen partnership measurement, which are detailed in this report. Common approaches include both complexity-aware monitoring (CAM) and evaluation methodologies—such as most significant change, social network analysis, and outcome mapping—as well as commonly used interview and survey methods. Learning approaches that can strengthen and improve partnership effectiveness were also emphasized in the literature.

Quantitative indicators for partnership measurement were identified, ranging from counting the number of partners to quantifying the added value of partnership approaches. However, the quantitative indicators discussed in this report often lacked standardization, detailed definitions, and recommended processes for measurement. This could limit their utility and comparability across partnerships.

Findings from the landscape review highlighted three main recommendations for partnership measurement:

1. Develop context-specific measurement approaches for the partnership.
2. Use of a variety of indicators and mixed-methods approaches to capture partnership complexity, outcome diversity, and contributions of partnerships to outcomes.
3. Prioritize participatory approaches and engage all partners in the process.

The resources highlighted in this report can assist organizations in developing tailored partnership measurement approaches that are grounded in existing evidence and recommendations.

OVERVIEW OF PARTNERSHIPS IN MOMENTUM

MOMENTUM is a suite of U.S. Agency for International Development (USAID) awards designed to accelerate reductions in maternal, newborn, and child mortality and morbidity by increasing the capacity of host-country institutions and local organizations to introduce, deliver, scale up, and sustain the use of evidence-based, high-quality maternal, newborn, and child health and nutrition services, voluntary family planning, and reproductive health care (MNCHN/FP/RH). Key to this approach is the increase of cross-sectoral collaboration and innovative partnerships between MNCHN/FP/RH and non-MNCHN/FP/RH organizations.

MOMENTUM incorporates partnerships across its theory of change (TOC) and results framework. MOMENTUM's Annual Program Statement emphasizes working with and through local systems, institutions, and organizations to promote sustainability, to engage strategic partners for resource mobilization, and to support common goals.[1]

The different MOMENTUM awards have taken context-specific approaches to developing, maintaining, and expanding partnerships during their award period. Partnership actors include private providers, religious/faith-based networks and organizations, civil society, non-health/multisectoral stakeholders, national and multinational corporations, philanthropies, professional organizations, academic institutions, and international and regional organizations.

A review of year one award workplans and monitoring, evaluation, and learning (MEL) plans highlighted the following areas of emphasis within MOMENTUM:

- Exploring proven models for public-private partnership that can expand service delivery and/or mobilize resources in different settings (e.g., low- and middle-income countries (LMICs), fragile states) and across the MNCHN/FP/RH continuum.
- Leveraging capacities of private health care providers, including drug shops, faith-based health care providers and networks, social enterprises, private manufacturers, and national and multi-national corporations to increase coverage, reduce costs, expand access, and promote sustainability.
- Harnessing MNCHN/FP/RH networks at all levels, from national professional associations and civil society organizations to global and regional organizations.
- Mobilizing religious partners, including faith-based organizations and networks, trusted religious leaders, and faith-based health providers for outreach, engagement, and service delivery, particularly in the areas of encouraging social and behavioral change and health promotion.
- Engaging non-health stakeholders, including those in the nutrition, water and sanitation, and education sectors, to expand awareness and access to MNCHN/FP/RH services.
- Emphasizing advocacy and community engagement for behavior change and improving the adoption of healthy behaviors at the community level, particularly for FP/RH services.
- Responding to the evolving context of COVID-19, there is increasing emphasis on leveraging trusted community partners to disseminate evidence-based information while combatting misinformation. This includes both the uptake of health promotion and COVID-19 prevention behaviors as well as encouraging vaccine uptake.

The diversity of existing and intended partnerships in MOMENTUM reflects the diversity of partnership types identified in the landscape review. Many of the partnership goals and activities expressed in MOMENTUM workplans exist at the national or subnational level and focus on service providing, standard setting, and knowledge sharing. Global partnerships with international organizations are focused on knowledge sharing for MNCHN/FP/RH.

This landscape review examines existing measurement approaches, frameworks, and metrics utilized to measure partnerships. The objectives of the analysis were to outline partnership typologies; identify existing definitions and conceptual frameworks; determine commonly used indicators and metrics; explore methodological approaches; and analyze the strengths, weaknesses, and gaps of existing approaches. Findings from this analysis will inform the selection of feasible and evidence-informed approaches to monitoring partnerships within MOMENTUM and may be used by other global health and development organizations looking to create or improve their partnership measurement approaches.

The first section of the landscape review provides an overview of how partnerships are defined and conceptualized and relates this back to MOMENTUM's partnership approaches and current MEL. It then outlines partnership success factors and the rationale and challenges for partnership measurement. The next section provides an overview of common measurement frameworks and methodologies, including what to measure, how to measure, when to measure, and where to find relevant data. The last section provides an analysis of strengths, weaknesses, and gaps of partnership measurement based on the landscape's findings and provides specific recommendations for MOMENTUM.

METHODS

The objectives of the landscape review were to:

1. Outline the different typologies of partnerships in the literature.
2. Identify existing definitions, conceptualizations, and frameworks utilized to measure or assess partnerships, particularly in MNCHN/FP/RH.
3. Determine indicators and metrics (including those using qualitative methods) utilized for different types of partnerships identified.
4. Explore how these approaches are utilized in practice and their accompanying methodologies, data sources, and disaggregators.
5. Analyze strengths, weaknesses, and gaps in existing approaches.

For the purposes of the landscape review, partnerships are defined broadly to include bilateral and multilateral partnerships involving public and private health provider organizations, non-governmental organizations (NGOs), community-based and faith-based organizations, professional associations, and civil society actors, including multisectoral partnerships with non-health organizations. A review of MOMENTUM award workplans and MEL plans was conducted to establish the scope of existing and intended MOMENTUM partnerships and how partnership approaches contribute to each project's TOC and results framework.

The initial scope of this review was limited to global health, with a particular emphasis on MNCHN/FP/RH in LMICs. However, due to the lack of literature, multisectoral measurement approaches utilized in adjacent sectors with a relationship to MNCHN/FP/RH (e.g., HIV/AIDS, tuberculosis, malaria, education, water and sanitation, and social development) were also considered. The review also incorporated literature from high-income settings, in addition to LMIC contexts, to expand available resources. Literature on global development alliances and global partnership platforms was excluded, as it focuses specifically on partnerships for global governance or partnerships between USAID and the private sector. Literature on public-private partnership (PPP) and public-private engagement (PPE) was included after reviews for the source's generalizability and relevancy to the landscape review's objectives. Approaches and indicators utilized for MEL were considered for this review, with an emphasis on monitoring indicators that can inform MOMENTUM's approach to monitoring partnerships for MNCHN/FP/RH advancement.

To conduct the review, relevant literature from 1998 to the present was identified and analyzed from April to May 2021. A search strategy was developed and executed to collect relevant reports, publications, frameworks, and indicators. Search terms included the key words partnership, multisectoral, private sector, measurement, indicators, effectiveness, monitoring, metrics, and frameworks. More than 170 resources from both academic and gray literature were reviewed based on the search criteria.

Literature was reviewed for relevance to the landscape review's objectives, and data were extracted into a Microsoft Excel-based matrix for analysis. Once findings were synthesized, content was analyzed to identify common themes, which were synthesized into strengths, weaknesses, and gaps.

HOW ARE PARTNERSHIPS DEFINED AND CONCEPTUALIZED?

Partnership can be defined as "a dynamic relationship among diverse actors, based on mutually agreed objectives, pursued through a shared understanding of the most rational division of labor based on the respective comparative advantages of each partner."[2] Similarly, the concept of partnership working is defined as "a coming together of organisations and individuals to resolve conflict or address specific issues which cannot be resolved by the organisations or individuals acting alone."[3]

There are many types of partnerships defined in the literature (Table 1). Examples in the right column illustrate the potential overlap between many of these terms and the partnership's members, goals, and outcomes.

TABLE 1. PARTNERSHIP TYPES AND DEFINITIONS

Term	Definition	Example
Public-private alliance (PPA)	"Public-private alliances combine the assets and experience of strategic partners (such as corporations and foundations), leveraging their capital and investments, creativity, and access to markets to solve complex problems facing government, business, and communities in developing countries."[4]	USAID and multinational corporations founded the Continuous Improvement in the Central American Workplace PPA to improve compliance with international labor standards, increase workforce competitiveness, and raise productivity.[5]
Public-private engagement (PPE)	"Modality that aims to engage with the private sector to deliver development results and involves the active participation of the private sector in terms of co-initiating, co-steering, and co-funding as guiding principles."[6] This is often presented in terms of donor agencies working with the private sector.	The Swiss Capacity Building Facility, a platform of social impact investors, partnered with Jordan's Microfund for Women to scale up financial lending services to Syrian refugee women in Jordan.[7]
Public-private partnership (PPP)	"Long-term contract between a private party and a government entity, for providing a public asset or service, in which the private party bears significant risk and management responsibility and remuneration is linked to performance."[8]	The Government of Benin and its municipalities engaged in a PPP with private Beninese utility companies to manage the country's municipal water supply and pipe networks.[9]

Multi-stakeholder partnership	"Ongoing collaborative relationship between or among organisations from different stakeholder types aligning their interests around a common vision, combining their complementary resources and competencies and sharing risk, to maximise value creation towards the Sustainable Development Goals and deliver benefit to each of the partners."[10] "Overarching concept which highlights the idea that different groups can share a common problem or aspiration, while nonetheless having different interests or 'stakes'."[11]	In Bolivia, the Agua Para Todos partnership brought together a public water company, a private water pipe manufacturer, a micro-credit organization, and community-level water committees to build and manage a water-distribution system in suburban areas, increasing water access and lowering costs for residents.[12]
Cross-sectoral partnership *(also called **multisectoral partnership**)*	"Involves organisations from different societal sectors working together, sharing risks, and combining their resources and competencies in ways that create maximum value, in order to simultaneously achieve the partnership objectives and the individual partner objectives. … These partners typically leverage their respective core knowledge, skills, resources, and assets to create solutions that are more innovative, more transformational, more sustainable, more effective, and/or more efficient than partners could achieve on their own."[13]	The Children Agenda Forum in Kenya is a cross-sectoral partnership platform that brings together organizations focused on children to advocate for meeting the Sustainable Development Goals.[14]
Intersectoral partnership	"Process of creating joint inter-organizational initiatives across two or three sectors."[15]	In Madagascar, the Commercial Agriculture Production Project brought together infrastructure and agricultural partners to rehabilitate a key road for rice exports, supported by local agricultural unions and agribusiness partners.[16]
Network	"Dynamic and complex systems of interconnected people contributing to coordination and joint action. This extended group of people share similar interests or concerns and interact with each other, remaining in informal contact for mutual assistance or support."[17]	The Middle East Network on Innovative Teaching and Learning is a formal network that promotes information, knowledge, and skills exchange as well as research projects focused on educational needs through the region.[18]

Specific typologies have been developed for partnerships between the public and private sectors. **Public-private alliances** (PPAs) aim to leverage the expertise, resources, and experience of private-sector partners to add value to development projects.[19] PPAs go beyond the financial contribution typical in PPPs to combine assets, expertise, and experiences of organizations toward a common purpose.[20] Specific to global health, PPAs are often leveraged to scale access to products and services, improving the reach of interventions.[21] This contrasts with **PPPs**, which are contractually-based, often longer-term engagements that are more narrowly focused on delivery of a service from the private sector.[22]

Another specific type of partnership is a **cross-sectoral partnership**. Cross-sectoral partnerships, also called multisectoral partnerships, are a subset of partnerships that involve actors across two or more sectors and seek to harness different sectoral expertise to amplify impact.[23] Literature categorizes cross-sectoral partnership models into four categories: (1) a joint project, defined as a short-term, one-time collaboration; (2) a joint program, where multiple partners are engaged in multiple projects or workstreams with a single objective; (3) a multi-stakeholder initiative, where partners and their resources are aligned to drive change on a common issue; and (4) collective impact, defined as long-term commitments to a common agenda.[24]

An alternative way of categorizing cross-sectoral partnerships is by the type of change they seek.[25] Three common categories are: (1) knowledge sharing, which aim to disseminate existing information to solve problems; (2) service providing, which seek to address market failures through new innovations, models, resources, products, or processes; and (3) standard setting, which aim to develop standards for public-sector failures.[26] Similar categories are also applied to multi-stakeholder partnerships in the literature.[27]

Intersectoral partnerships are similar to cross-sectoral partnerships, and the terms are often utilized interchangeably. In contrast, **multi-stakeholder partnership** is a broader term that emphasizes differences in stakeholders – for example, within government, the private sector, and civil society. Stakeholders represented in the partnership can be from one sector or represent different sectors.

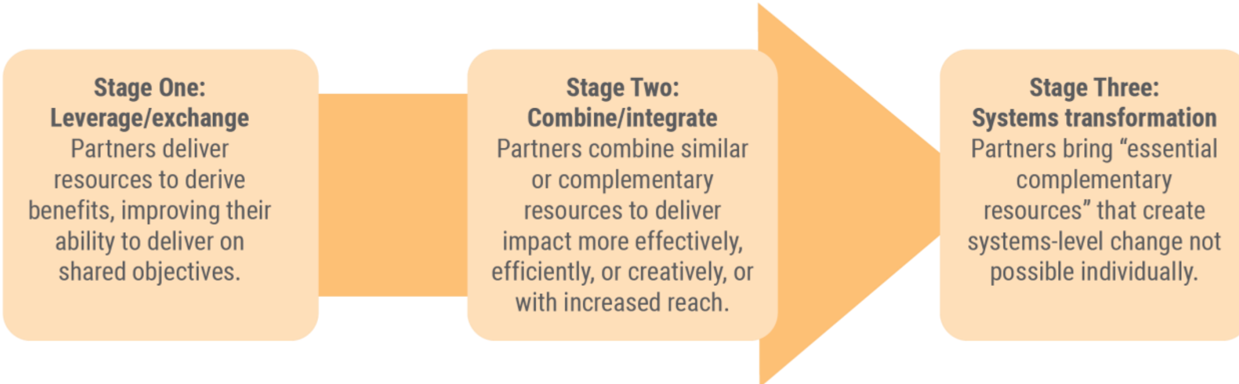
Finally, **networks** are a closely related concept to partnerships. There are three categories of networks: (1) informal networks, which exist organically, are usually short-term, and are not actively managed; (2) communities, or shared groups of people that come together for a shared purpose or interest (e.g., communities of practice); and (3) formal networks, defined as "interrelated groups of people or organisations that are established according to a specific design or need."[28] Networks can be centralized or decentralized, with larger networks tending toward more decentralization.[29]

STAGES OF PARTNERSHIP

Partnership is often described on a continuum of different levels of formality. Partnerships can be formalized through agreements or memorandums of understanding (MOUs), or they can represent less formal collaboration.[30] Partnerships can be short-, medium-, or long-term.

The *Maximising the Impact of Partnerships for the SDGs* resource guide outlines three types of partnerships that exist along a spectrum based on the depth of collaboration and integration across organizations (Figure 1). This typology can be applied to characterize different types of partnerships operating within global health.

FIGURE 1. PARTNERSHIP SPECTRUM[31]



LEVELS OF PARTNERSHIP

Partnerships can exist at multiple levels, from international to local. Table 2 outlines levels of partnership depending on where the intervention takes place.

TABLE 2. TYPES OF PARTNERSHIP BY LOCATION[32]

Location	Description
Global	Global partnerships often work toward broadly representative agreements and are generally highly formalized in nature, with links to national governments. International partnering approaches, on the other hand, are often led by nongovernmental actors and focused on single issues related to implementation.
Regional	Collaboration across actors and countries for common regional goals, often led by government actors.
National	Can be driven by government or nongovernmental actors to address a range of problems of national concern.
Subnational or Local	Often focused on implementation related to local concerns or challenges. Can focus on one geography or a single issue area.

WHAT MAKES A PARTNERSHIP SUCCESSFUL?

Literature reviewed highlighted characteristics that make partnerships successful and offered resources to guide partnership health assessments (Box 1). These are synthesized below:[33,34,35,36,37]

- Diversity is encouraged. Successful partnerships draw from different sectors and are inclusive of organizations with different sizes, experiences, and skill sets.
- Leaders display a strong commitment to the partnership.
- There is a shared understanding of the problem and a common vision for how the partnership will generate impact.
- The goals of the partnership are aligned with the core values of partnership members.
- Partnership processes are established and agreed to by all partners. This can include ground rules, decision-making processes, shared expectations, and vertical and horizontal accountability structures.
- Processes strike a balance between bottom-up and top-down approaches and foster shared learning.
- Partners can anticipate and manage conflict, working effectively within power differentials.
- Principles of mutuality and cooperation are valued. This includes mutual dependence among organizations, collaborative engagement of all partners from the onset, shared ownership, and mutual respect.
- The partnership outlines clear responsibilities, rights, and obligations of all partners.
- Contributions of all partners are seen as fair and equitable, including financial and non-financial resources. Organization should bring unique contributions to the partnership, including resources, skills, relationships, and experience.

BOX 1.
Partnership Checklist

The OECD LEED Forum for Partnerships and Local Governance's guide to successful partnerships includes a partnership checklist that can guide the formation and maintenance of a successful partnership.

WHY MEASURE PARTNERSHIPS?

Calls to increase and improve partnership measurement have grown as partnership approaches have become more common in global health and international development. Commonly cited benefits of partnership measurement in the literature include:[38,39,40,41,42,43]

- Developing a shared set of outcomes and goals for the partnership.
- Creating transparency in defining success which can build trust and support a common vision.
- Determining the value of the partnership for all parties, promoting longevity and sustainability of the partnership.
- Improving the functioning of partnerships by identifying strengths, weaknesses, and areas for improvement.
- Providing actionable guidance for needed adjustments.
- Generating accountability and demonstrating success to stakeholders and funders.
- Identifying successful approaches to scale-up.
- Establishing whether a partnership met its objectives and added value to the program.

Despite the benefits of partnership measurement, reviewed literature highlighted a lack of research and evidence on partnership effectiveness.[44] This gap is driven in part by a lack of outcome-focused partnership measurement by organizational partnerships.[45,46] Instead, the most common area of focus is compliance or process indicators that count or quantify partnerships but do not link these assessments to outcomes.[47]

COMMON CHALLENGES IN PARTNERSHIP MEASUREMENT

A common rationale cited in the literature for the lack of partnership measurement is the challenges associated with the measurement process. The landscape review found that that there is no standard approach or set of indicators to measure partnerships.[48,49] Commonly cited challenges with partnership measurement include:[50,51,52,53]

- All partnerships are unique, characterized by different levels of formality, integration, and duration. Partnership goals are also complex and diverse, making standardization difficult.
- Partnerships continually evolve, and their value is not easily quantified. Indicators often oversimplify partnership complexity. Partners or the partnership modality may change from one measurement period to the next, which makes comparison over time challenging.
- Partnerships tackle diverse and wide-ranging challenges at different levels, making it difficult to compare the results of different partnerships or to develop a single definition of success.
- Many organizations have limited time and resources for measurement. There is an overreliance on collecting easy-to-measure indicators instead of more meaningful ones, limiting the value of partnership measurement.
- Although partnership measurement works best as a collaborative exercise, the varying perspectives of partners may create challenges in integrating all partners' interests into a common measurement framework.

- Measuring partnership outcomes is complex, and attribution can be challenging or unclear. Some partnership results may be context-specific, while others may be intangible or unexpected.

HOW ARE MOMENTUM AWARDS CURRENTLY MEASURING PARTNERSHIPS?

MOMENTUM's TOC and results framework emphasize a diverse range of partnership approaches with the common goal of improving effective coverage of MNCHN/FP/RH services and reducing maternal and child morbidity and mortality in partner countries (Box 2). Each MOMENTUM award is developing context-specific strategies for engaging non-state partners that can support expansion or improvements in service delivery, improved standards, or increased knowledge dissemination, with a cross-cutting emphasis on behavior change communications and community engagement.

A review of year one award workplans and monitoring, evaluation, and learning (MEL) plans highlighted the following areas of emphasis within MOMENTUM:

- Exploring proven models for public-private partnership that can expand service delivery and/or mobilize resources in different settings (e.g., low- and middle-income countries (LMICs), fragile states) and across the MNCHN/FP/RH continuum.
- Leveraging capacities of private health care providers, including drug shops, faith-based health care providers and networks, social enterprises, private manufacturers, and national and multi-national corporations to increase coverage, reduce costs, expand access, and promote sustainability.
- Harnessing MNCHN/FP/RH networks at all levels, from national professional associations and civil society organizations to global and regional organizations.
- Mobilizing religious partners, including faith-based organizations and networks, trusted religious leaders, and faith-based health providers for outreach, engagement, and service delivery, particularly in the areas of encouraging social and behavioral change and health promotion.
- Engaging non-health stakeholders, including those in the nutrition, water and sanitation, and education sectors, to expand awareness and access to MNCHN/FP/RH services.
- Emphasizing advocacy and community engagement for behavior change and improving the adoption of healthy behaviors at the community level, particularly for FP/RH services.
- Responding to the evolving context of COVID-19, there is increasing emphasis on leveraging trusted community partners to disseminate evidence-based information while combatting misinformation. This includes both the uptake of health promotion and COVID-19 prevention behaviors as well as encouraging vaccine uptake.

BOX 2.

MOMENTUM Results Framework

MOMENTUM incorporated partnerships in the following places in its results framework:

Result 4: Cross-sectoral collaboration and innovative partnerships between MNCHN/FP/RH and non-MNCHN/FP/RH organizations increased.

IR4.1 International and national public-private partnerships increased.

IR4.2 Health partnerships with educational institutions expanded.

IR4.3 Health partnerships with corporate and philanthropic organizations increased.

IR4.4 Health and non-health organization partnerships expanded.

The majority of MOMENTUM awards are already utilizing one or more quantitative indicators in their initial MEL plans to monitor partnerships. The most commonly used indicator is 'the number of partnerships formed or strengthened'. Many awards have specified the types of partnerships or actors to capture within this indicator, including non-health organizations, philanthropic organizations, civil society, corporations, and educational institutions. Additional indicators include 'the value of capital mobilized' and a qualitative indicator to 'describe new or ongoing partnerships beyond consortium members'.

In addition to a results framework and monitoring indicators, MOMENTUM's learning agenda focuses on improving an understanding of how partnership approaches can improve MNCHN/FP/RH outcomes. Learning agenda questions include:

- What strategies are awards using to increase coverage in MNCHN/FP/RH (includes supply/availability, demand, access, and private-sector engagement)?
- How are strategic partnerships designed and sustained (and under what conditions) to successfully (feasibly and acceptably) improve coverage, quality, and/or equity?
- Which strategic partnerships are important (and under what conditions) to foster and strengthen country progress toward sustainable development?

CONCEPTUAL FRAMEWORKS FOR PARTNERSHIP MEASUREMENT

The landscape review identified several conceptual frameworks that can be applied to partnership measurement as outlined below.

PARTNERSHIP SYNERGY AS THE MECHANISM TO ACHIEVE PARTNERSHIP EFFECTIVENESS

Lasker, Weiss, and Miller (2001) have argued that synergy is the mechanism by which partnerships are successful at generating outcomes.[54] Synergy is the ability of individuals or organizations to combine their experiences, resources, skills, and ideas to create a new outcome that is more than the sum of the individual parts. Diversity in partnerships can create synergy by bringing together complementary traits that each individual actor cannot possess on their own, but diversity also brings challenges to collaboration, can create conflict, and requires additional management and coordination skills.

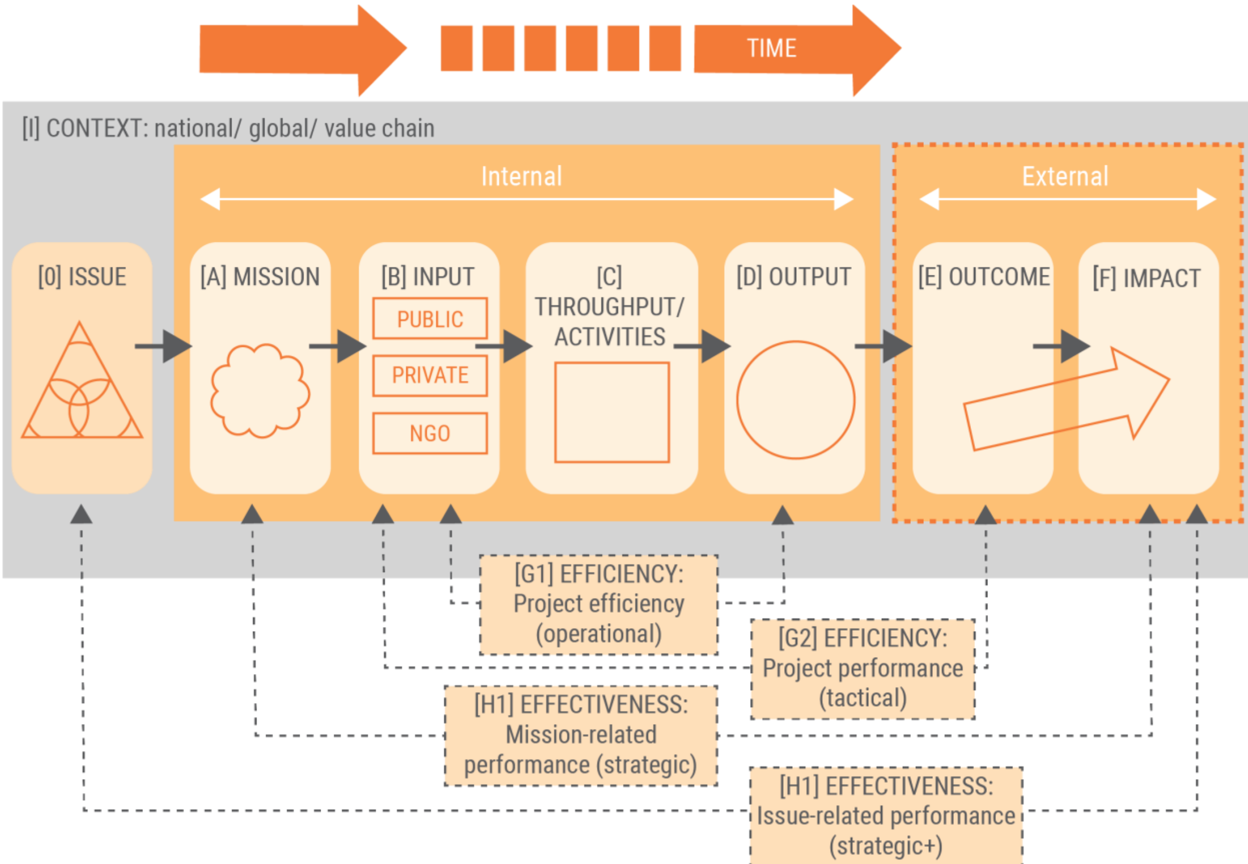
Applying this approach, assessing partnership effectiveness should therefore focus on components of synergy guided by two learning questions: (1) Is collaboration better than efforts by single agents in improving the capacity of communities to achieve health and health systems goals? and (2) What can be done to realize the full potential of collaboration?[55] Figure 2 outlines a slightly adapted version of Lasker, Weiss, and Miller's Framework for Assessing Partnership Synergy.

FIGURE 2. FRAMEWORK FOR ASSESSING PARTNERSHIP SYNERGY[56]

THE PARTNERSHIP MONITORING AND EVALUATION FRAMEWORK

Van Tulder, Seitanidi, and Brammer (2016) developed the partnership monitoring and evaluation framework, which outlines a general partner impact value chain and provides considerations for how to assess contribution and attribution (Figure 3).[57] The center of the framework represents the impact value chain for a partnership. The chain starts from the issue the partnership addresses (0), flowing into the mission of the partnership and its presented solution (A), which informs inputs to the partnership (B). Throughputs, or activities, are the work of the partnership and are often the focus of process evaluations as well as routine monitoring (C). Outputs are the deliverables from the partnership (D), outcomes are the benefits of the partnership (E), and impact is the final change the partnership seeks to create (F).[58] The outside loops represent partnership outcomes that can be evaluated during an assessment process.

FIGURE 3. PARTNERSHIP MONITORING AND EVALUATION FRAMEWORK[59]

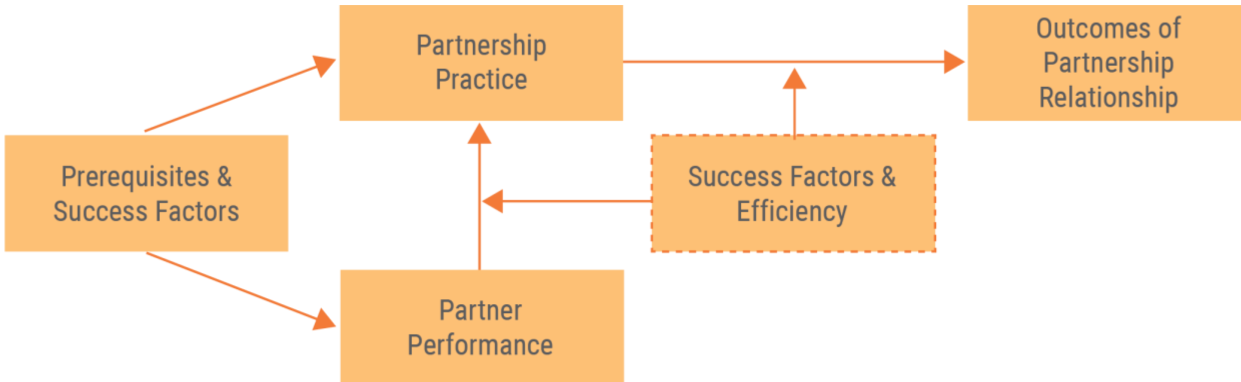


CAUSAL CHAIN FOR RELATIONSHIP OUTCOMES

Brinkerhoff (2002) developed a causal chain for relationship outcomes to facilitate the assessment of partnership relationships linked to partnership outcomes (Figure 4). Prerequisites and success factors represent the enabling factors for partnership, including the presence of champions and organizational culture. Partnership performance contains both quantitative and qualitative characteristics including partner contributions and fulfillment of roles, while partnership practice is assessed on degrees of mutuality and organizational identity. The relationship between outcomes, partner performance, and practice is moderated by the management of success factors and efficiency, hence the dashed outline directed toward the arrows between the boxes. Outcomes of the partnership (similar to the other frameworks) represent the value-add of the partnership and ask, “Is the partnership generating more than the sum of its parts?”

Example dimensions for each component of the framework are found in Brinkerhoff (2002) and can be used to guide partnership assessment. A flexible and adaptable approach to measurement is recommended, with the framework and dimensions providing a scaffolding to highlight critical areas of partnership measurement.[61] Specific indicators for the partnership should be developed in a participatory fashion and can be mapped onto each aspect of the framework. A 2017 Gavi evaluation on the HPV vaccination process in Uganda provides an example on how this framework can guide partnership evaluations.[62]

FIGURE 4. CAUSAL CHAIN FOR RELATIONSHIP OUTCOMES[60]



COMMON PARTNERSHIP MEASUREMENT METHODOLOGIES AND THEIR UTILIZATION IN PRACTICE

The results of the landscape review highlighted the complex nature of partnership measurement. Identified resources avoided developing or recommending standardized approaches and instead provided process guidance on how to form and sustain successful partnerships. MEL was frequently presented as a component of partnership formation and maintenance, with general guidance, approaches, and tools presented in the literature. This finding is similar to a 2017 study on multisectoral partnerships which found ample available literature how to set up and sustain multi-stakeholder partnerships, but few evaluations of partnerships.[63]

MEL resources identified provide a range of flexible options and tools to assess partnerships and were primarily evaluative or learning focused. Gray literature frequently recommended processes for jointly creating indicators for specific partnerships rather than providing standardized indicators for broader use. Academic literature on partnership measurement approaches was either conceptual or specific to a particular case study. Most resources were focused on sustainable development and social change without a specific country or sectoral context and were therefore deemed broadly applicable.

Based on synthesis of the literature identified, this section outlines: (1) types of indicators, (2) methodologies, and (3) general process guidance for measurement. The guidance in this section is drawn from a variety of types of partnerships but is expected to be broadly applicable and can be further adapted to different contexts.

WHAT TO MEASURE?

Table 3 outlines the types of indicators used to assess partnerships, their definitions, and their strengths and weaknesses. The types of indicators are ordered along the causal pathway to partnership impact; process and compliance indicators focus on inputs, activities, and outputs, while incremental value and outcome indicatorsrepresent outcomes.

Appendix A catalogs the individual indicators for partnership measurement identified through the landscape review. The appendix table may be a useful resource for MOMENTUM awards or other global health projects looking to adapt existing indicators for their projects.

> *"Experience of partnerships shows that there is no 'one size fits all' model that can be neatly applied from place to place. Indicators for measuring the effectiveness of partnerships are much the same: they must be developed in situ taking into account the definitions of success of each partner."*
>
> **–Caplan and Jones (2002)**

TABLE 3. TYPES OF INDICATORS USED TO MEASURE PARTNERSHIPS[64,65,66,67]

	Definition	Example	Strengths	Weaknesses
Measures partnership inputs, activities, and outputs				
Compliance	Whether a project or partnership is meeting its targets.	Number of partners per setting.	• Provides routine monitoring data. • Data can be easily collected and frequently analyzed. • Often required to demonstrate responsible use of resources.	• Does not demonstrate the value of a partnership model. • Descriptive.
Processes	The outputs, processes, or mechanisms of implementation through the partnership model.	Number of workplan activities to which partners are contributing, disaggregated by partner.	• Supports implementation tracking and can inform activities and program adjustments.	• Descriptive. • Requires conceptual linkage to project outcomes.
Measures outputs and outcomes				
Incremental value	The value of the partnership itself and the contributions of partners. Dimensions of measurement for incremental value can include: (1) scale, (2) effectiveness, (3)	Percent change in cost per outcome relative to non-partnership approach.	• Builds an argument for the value-add of a partnership approach. • Can be used to compare the benefits of partnership with transaction costs. • Can assess multiple actors in a partnership and their absolute or relative contributions.	• Hard to quantify intangible contributions.

	efficiency, (4) sustainability, and (5) systematic change.			
Partnership outcomes	Intermediate-, short- or medium-term changes driven by the partnership. Can include changes in systems and/or improvements in health status.	Number of documented changes through partnership intervention (for example, increased coverage of an intervention).	• Captures progress toward longer-term outcomes and desired impact. • Links partnerships to the broader theory of change or outcome metrics for the project. • Builds an argument for how the partnership contributed to impact.	• Can be challenging to assess contribution of the partnership to outcomes. • Often requires more data and a longitudinal approach to capture changes over time.

A 2011 review of USAID development programs found that most programs utilized compliance, or monitoring indicators to measure partnerships.[68] Other resources have found similar trends.[69]

Compliance and process metrics are valuable in monitoring and evaluating inputs, activities, and outputs of a partnership approach. They can be more easily incorporated into routine monitoring systems. They also illustrate whether a partnership is reaching its initial targets, providing a plausible case for outcomes. For projects meeting their targets, value, contribution, and outcome metrics can then assess the partnership's contributions to outcomes and the possibility for impact. This includes measuring improvements in efficiency, reach, and effectiveness of interventions through the partnership model.

A common challenge in partnership measurement is the measurement of attribution—that is, whether the partnership is responsible for generating a specific set of outcomes. Literature recommends that organizations take a contribution approach instead of trying to prove attribution.[70,71] By selecting a well-balanced set of indicators along the causal pathway and documenting contextual factors, the project can build an argument for the partnership's contribution to outcomes.[72]

Incremental value indicators that use a comparision group come the closest to providing attribution of specific outcomes to a partnership. By using a comparision group, these indicators build a stronger argument than other indicators that the partnership approach specifically caused the observed outcome. In contrast, process and outcome indicators are more likely to identify contributions from a partnership aproach, which can be further triangualted with qualitative methodologies to understand the role of the partnership in the outcomes. Box 3 provides examples of USAID project evaluations that

BOX 3.

Examples of Partnership Assessment

Many USAID-funded projects have applied partnership approaches to development challenges. These examples may be useful for MOMENTUM or similar projects:

- USAID/Kenya and East Africa's Partnership for Resilience and Economic Growth's highlights the value of a CLA approach.[73]
- USAID's LASER PULSE conducted a mixed-methods evaluation on PSE engagement.[74]
- Evaluation of USAID/India's partnerships models and approaches.[75]

emphasize the contribution of partnership approaches.

A closely linked concept to contribution is additionality, or the added value from a partnership model.[76] Additionality, in addition to or instead of contribution, is frequently used in private sector engagement (PSE) approaches and often emphasizes the "extent to which an intervention triggers investments that businesses or international cooperation would not otherwise make, or makes them happen more quickly, on a bigger scale, or more successfully in terms of development outcomes."[77] Specific methodologies have been developed to assess additionality of PSE, with an emphasis on harnessing private-sector financial resources. For more guidance, see Demonstrating Additionality in Private Sector Development Initiatives by Heinrich et al. (2014).

HOW TO MEASURE?

A variety of quantitative and qualitative approaches are used to measure partnerships. These measurement approaches can be flexibly deployed to measure the volume of partnerships, partnership strength or health, partnership outcomes, or challenges with existing partnerships. Table 4 outlines a range of approaches identified through the landscape review, and Box 4 highlights additional resources.

The landscape review did not uncover a standardized, or most common, approach to partnership assessment. A lack of standardized approaches holds true across partnership typologies, as well as within specific types of partnerships. Existing guidance encourages a measurement approach specific to the goals and objectives of the partnership itself. Therefore, the guidance is this document is designed to be flexible and adaptable to different types of partnerships across diverse contexts.

Regardless of the approach used, a few common measurement principles were recurrent in the literature. These included:

BOX 4.

Multi-Sectoral Partnership Tool Repository

The Wageningen Centre for Development Innovation has cataloged 60 tools and approaches that can be applied to multi-stakeholder partnerships and are likely to be useful for other partnership types.

- **Develop a TOC, impact model, or causal results chain specifically for the partnership to guide assessments**. Outlining the specific inputs, activities, outputs, outcomes, and impact of the partnership is important to selecting indicators and guiding assessment approaches. Assumptions that underpin the TOC should also be articulated and can be further tested through measurement approaches.
- **Apply a mixed-methods approach**. Mixed-methods measurement approaches can provide a deeper understanding of what happened (quantitative), and why, how, and for whom (qualitative). Qualitative approaches can improve understanding of the mechanisms by which outcomes were generated, and the additionality or contribution of the partnership vis-à-vis contextual factors.
- **Encourage participatory approaches**. Representatives from all organizations in the partnership should participate in MEL exercises.
- **Be realistic**. Choose a manageable number of indicators to measure on an ongoing basis; more intensive approaches can be used annually or at baseline and endline.
- **Document contextual factors**. Contextual variation is key to understanding why something worked or did not work and in what circumstances the results may be transferable. Contextual factors may also support or impede partnership success; for example, a stable economic and political

environment may support the formation of longer-term partnerships. This is sometimes described as documenting the determinates of effectiveness, which can be present at the context, process, and/or outcome levels.[78]

TABLE 4. METHODOLOGIES USED TO ASSESS PARTNERSHIPS

Based on the findings of the landscape review, it is hypothesized that the methods can be applied or adapted to a variety of different types of partnerships, contexts, and sectors. Many of these approaches are commonly used MEL or research approaches that have been applied to partnership measurement. See Appendix B for more methodology details and the strengths and weaknesses of each approach.

Methodology	Goal
Specific MEL approaches applied to partnerships	
Outcome mapping*	Tracks behavioral changes along the causal pathway to impact for a program or partnership. Considers the role of direct partners and boundary partners, which are groups the project works with to direct or impact change.[79] By systematically assessing the influence of partners at key points during the project, outcome mapping can allow partners to develop inferences about their contributions to development outcomes and/or impact.[80]
Most significant change (MSC)*	A qualitative approach focused on storytelling, MSC involves harvesting stories from partners, determining which stories are most significant, and documenting and sharing the stories with all stakeholders, with processes for continual learning developed from stories of change.[81]
Appreciative story telling ***(also called appreciative inquiry)***	A qualitative learning approach to gathering partners' stories, appreciative story telling gathers success stories and perceived solutions or wins in order to envision future partnership outcomes and successes.[82] It is sometimes considered an internal, learning-focused version of MSC.
Social network analysis (SNA)*	Maps and measures relationships between people, organizations, and other entities to understand interactions between them. SNA measures knowledge flows and can illustrate who plays a central role in the network or large partnership, identify isolated members, illuminate bottlenecks, and highlight areas of impact.[83] ***Actor mapping** is a less intensive approach that could be used instead of SNA.*
Reflective monitoring	Reflective monitoring is an adaptive learning approach that guides participants in thinking about what they are doing and how they are doing it to inform iterative planning and improvement.[84] It can be used to spark dialogue and guide iterative adjustments to partnerships. *This is a similar approach to **pause and reflect** or **pause and learn** by USAID.**
Contribution analysis*	Contribution analysis aims to make a causal claim by validating a TOC and testing plausible alternative hypotheses.[85] This methodology is iterative in nature, with adjustments to the TOC as new evidence is collected. Contribution analysis can be applied to understand how a partnership contributed to outcomes.
Standard research approaches applied to partnership measurement	
Interviews	Provide a detailed exploration of key stakeholder's experiences and perspectives. Can also verify facts, collect suggestions, and explore hypotheses.
Survey – **pre/post or longitudinal approaches**	Pre/post or baseline/endline surveys can capture changes over the life of a partnership to evaluate outcomes or impact. More frequent measurements can capture changes over time to inform partnership monitoring and adjustments.

Survey – cross-sectional	To capture the status of a partnership at one point in time.

** Considered a complexity-aware monitoring (CAM) approach in line with USAID's collaborating, learning, and adapting (CLA) methodology. For more information on CAM approaches, see the Guide to Complexity-Aware Monitoring Approaches for MOMENTUM Projects.*

Approaches identified in Table 4 can be utilized for monitoring, evaluation, or learning; however, most of the resources provided guidance for conducting assessments or evaluations. Resources did not prescribe a specific approach, but rather represented various approaches as options that be selected to answer specific MEL questions for the partnership.

Approaches can be combined to strengthen findings and minimize weaknesses associated with a single approach. For example, findings from a survey on partnership outcomes can be further validated and contextualized with MSC, appreciative storytelling, or outcome mapping approaches. Lessons from ongoing reflective monitoring can inform evaluation questions answered by contribution analysis.

In addition to generalized approaches, Appendix C contains specific tools for partnership assessment that were identified by the landscape review (see Box 5 for an overview). These tools utilize survey methods to answer questions about partnership effectiveness, performance, or collaboration. They may be applicable for organizations that require off-the-shelf tools for partnership measurement and can be used as standalone approaches or combined with qualitative or adaptive MEL approaches. Organizations with more context-specific needs or that have in-house MEL capacities may find a customized approach more appropriate, drawing on the approaches in Table 4 and using the tools in Appendix C as examples to create their own methodologies, data collection tools, and/or measurement indicators.

BOX 5.

Pre-Existing Tools for Partnership Assessment

- ***The Partnership Assessment Tool*.** Rapid survey tool to assess partnership effectiveness.
- ***Wilder Collaboration Factors Inventory*.** Online survey tool to assess collaboration.
- **CoalitionsWork.** Self-administered survey to measure partnership performance.
- **PARTNER Platform.** A licensed software to facilitate SNA and actor mapping.
- **Partnership Health Check**. Survey tool to monitor partnership health.
- **QualityMeasures™ *Partnership Effectiveness Continuum***: Survey tool that supports learning and reflection on how to develop an effective partnership.
- **Network survey tools:** A 2017 evaluation of the Gavi HPV vaccine application process has publicly available survey tools to assess partnership roles and contributions in a network model.

See Appendix C for more details on these tools.

WHERE CAN THE DATA COME FROM?

A variety of data sources are recommended to support partnership assessment. Many of the approaches in Table 4 require primary data, including SNA, MSC, interviews, and surveys. Literature also highlighted secondary data sources that can support partnership assessment, including routine program documentation that organizations and projects are likely already collecting.[86] These data sources include:

- Program activity documentation and regular reporting, which can be used to collect routine monitoring indicators.
- Partner meeting minutes, which can be useful for compliance or process indicators as well as contribution analysis or outcome mapping by establishing what the partnership did over time.
- Partnership MOUs or other agreements that documentcommon understandings, roles, and outcomes.
- Meeting attendance sheets, which can be helpful for monitoring the volume of partnerships, diversity of partners, and their engagement in specific activities or engagements.
- Critical event logs to document "changes in resources, events facilitated by the partnership, events in support of partnership activity, or events that are barriers to partnership goals."[87] These logs can be useful in outcome mapping or contribution analysis.

WHEN TO MEASURE?

Ideally, measurement approaches are imbedded into project processes. Literature also recommends establishing a baseline to track progress over time and to better capture the additionality of the partnership at the end of a project.[88,89]

The Centers for Disease Control and Prevention (CDC) partnership stages model describes a typical process of developing a new partnership from the perspective of an organization. In Figure 5, these partnership stages are mapped onto sample metric types and measurement approaches identified in the literature.

FIGURE 5. EXAMPLE MEASUREMENT APPROACHES FOR EACH STAGE OF PARTNERSHIP[90]

NEEDS ASSESSMENT	Develop a logic model or TOC outlining how the partnership will contribute to desired outcomes and link to the project's impact.
FORMATION	Baseline survey can capture the initial status of a partnership.
BUILDING	Social network analysis can analyze how a complex partnership network is evolving. Reflective monitoring can support iterative changes to partnership processes.
MAINTENANCE	Surveys can be repeated to capture changes from baseline. Outcome mapping can identify additionally and contributions from partnership.

WHO MEASURES?

Two commonly used approaches are recommended in the literature: (1) representatives from all partners work collaboratively to measure, evaluate, and learn; or (2) an independent facilitator or evaluation expert is used to bring a neutral voice and external expertise. A combination of both approaches—with partners working with an evaluation specialist to develop and institutionalize MEL approaches—is often appropriate.[91]

Regardless of who leads the evaluation, it is recommended that the evaluation process is participatory. A multi-stakeholder group from all partners can be convened to guide the process, develop indicators, support the interpretation of results, and use the findings.

DEVELOPING AN MEL PLAN FOR YOUR PARTNERSHIP

Findings from the landscape review emphasized a customizable approach to determining the right partnership measurement strategy for a specific partnership and its objectives. The indicators, approaches, and generalized guidance outlined above can provide a foundation for the development of a customized plan.

The CDC's *Partnership Evaluation Guide* (2008) is a step-by-step resource that outlines steps in developing a partnership evaluation (Figure 6). Although developed for evaluations, the steps are broadly applicable to the development of an MEL plan. For example, in step four, questions across the MEL spectrum can be determined, with different indicators developed in step five. Data collection and analysis for monitoring questions may be conducted on an ongoing basis, while data for evaluation questions may be collected and analyzed at baseline and endline.

FIGURE 6 PARTNERSHIP EVALUATION PROCESS GUIDANCE[92]

1. **Use and user**: Determine who will use the results, determine the time, human and financial resources, and capacities available, and make an evaluation plan.
2. **Stakeholders:** Engage needed stakeholders and members of the partnership. Define roles, responsibilities, and expected contributions.
3. **Describe:** Develop a logic model or TOC for the partnership, including contextual factors. Clarify the stage of the partnership's development.
4. **Focus:** Focus the evaluation on a defined list of questions, which will provide inputs into your evaluation plan. This can include process, effectiveness, outcome, impact or other questions.
5. **Gather evidence**: Identify appropriate methodological approaches, indicators, and data sources to answer the questions defined in step four. Develop, test, and deploy data collection tools.
6. **Analysis and justification:** Analyze and interpret the data. Check for errors and the impact of contextual factors on your findings and inferences. Triangulate results with other sources of information or past studies.
7. **Dissemination and use:** Share the evaluation results with others, and use them to inform the partnership and your programming.

Adapted from Centers for Disease Control and Prevention (2008).

STRENGTHS, WEAKNESSES, AND GAPS IN EXISTING APPROACHES

Findings of the landscape review illustrate key **themes** in the field of partnership measurement:

- Conceptually, the benefits of partnership measurement are wide ranging; however, the evidence on partnership measurement itself and how it contributes to improved partnership outcomes is nascent.

- Despite increasing calls to improve partnership MEL approaches, many partnerships have continued to use compliance or process metrics over outcome metrics.
- There is no one-size-fits-all approach to partnership measurement that has been developed or is commonly utilized across many organizations. Instead, a context-specific approach following the general principles outlined in this report is recommended.
- Across the MEL spectrum, partnership measurement should be participatory. Engaging all the stakeholders, including meaningful representation from all partners, was repeatedly emphasized in the literature.
- Mixed-methods approaches and CAM methodologies can best capture the complexity of partnerships and their diverse outcomes.

The flexible and adaptable nature of partnership measurement is a key **strength**, allowing each partnership to customize an approach that captures its unique contributions and intended outcomes. The approaches outlined in this report are established methodologies with published guidance on implementation, supporting their adaptation for partnership measurement. The emphasis on mixed-methods approaches can also be seen as a strength, with many resources emphasizing systems-thinking, complexity-aware, and learning-focused methods that seek to not only quantify results but also explain how, why, for whom, when, and how often they occur.

However, this same flexibility may be seen as a **weakness**, as it limits the comparability of results across partnerships and reduces the ability to generate a broader evidence base on partnership effectiveness. It also requires partner organizations to have in-house MEL capacities and/or dedicated resources to support the development and execution of a customized MEL plan. Finally, applying common MEL or research methodologies to partnership measurement requires careful consideration of how to adapt them to specifically capture partnership metrics, not just broader project metrics that may be more familiar to program staff.

A key **gap** identified by the landscape review is the limited availability of quantifiable indicators that can be applied to partnership measurement. Although a number of indicators were identified (see Appendix A), there was sparse information on definitions, descriptions, recommended data sources, methodologies, disaggregation, and measurement frequency. This lack of specificity requires users of the indicators to draw hypotheses about indicator use which could limit comparability across settings. Additionally, none of the indicators identified in the landscape review appear to have been validated, and few were specifically developed for LMIC settings or global health programs.

Finally, and despite the identified literature urging a focus on outcome-oriented metrics, the majority of metrics identified were compliance or process indicators. The context-specific reality of outcome measurement for the diverse field of partnership has likely led to the emphasis on approaches and processes to measurement rather than the development of broadly applicable outcome metrics, as highlighted previously. However, a lack of readily available outcome metrics for adaptation may further limit partnering organizations' ability to determine, track, and compare quantifiable partnership outcomes over time.

APPLICABILITY OF FINDINGS TO MOMENTUM

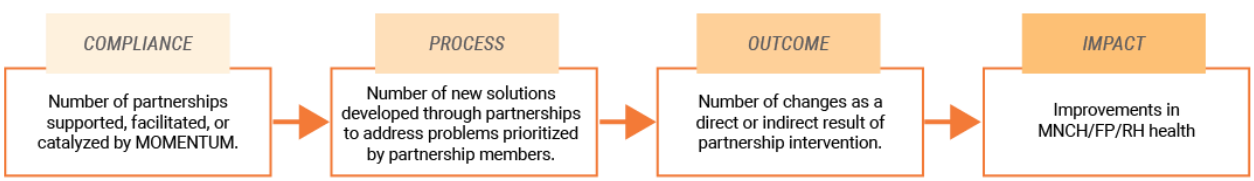
The findings of the landscape review support the tailored approach MOMENTUM is taking to partnership development and provide further validate the CAM approaches and CLA principles already adopted by the project. The findings also provide new insights that can support how partnerships are monitored and evaluated and how learning can be facilitated.

Based on the findings of the landscape review and the TOC for MOMENTUM, three indicators are recommended for use across all MOMENTUM awards:

- **Indicator one: Number of partnerships supported, facilitated, or catalyzed by MOMENTUM.** This indicator provides contextual information on partnerships, including the problem, objective, and partnership members. This indicator can be disaggregated by the types of partners in the partnership, supporting tracking of the different types of partners included in the MOMENTUM results framework. To avoid unintended incentives of counting up partnerships, partnerships should be defined as a meaningful partnership that exists with a clear objective to solve a prioritized problem.
- **Indicator two: Number of new solutions developed through partnerships to address problems prioritized by partnership members.**[93] This indicator builds the case for contribution of a partnership to one or more outcome(s) and seeks to demonstrate the value of a partnership in generating new solutions. It captures implementation insights and can contribute to cross-award learning.
- **Indicator three: Number of changes as a direct or indirect result of partnership intervention.**[94] This is an outcome-focused indicator that connects partnerships with improved MNCHN/FP/RH outcomes and MOMENTUM's overall TOC. This indicator improves MOMENTUM's ability to capture the contributions of partnerships to outcomes and can support the answering of learning questions for the project. More broadly, it highlights the types of improvements that can be generated for MNCHN/FP/RH through a partnership model and how these improvements are contributing to outcomes.

These indicators are designed to build on one another and follow a causal pathway toward impact. Figure 7 outlines how the indicators work together—first by capturing partnerships, then by documenting solutions at the output level, and finally by documenting how the partnership has contributed to improved outcomes, leading to hypothesized impact in MNCHN/FP/RH.

FIGURE 7. RELATIONSHIP BETWEEN THE INDICATORS ALONG THE CAUSAL CHAIN TO IMPACT



The proposed indicators speak to Result Areas Four and Intermediate Result Areas 4.1 to 4.4, allowing MOMENTUM to track progress in a uniform way across all awards. They aim to provide a common set of baseline information that will contribute to additional learning and evaluation studies on specific partnerships, and they reflect recommendations from the landscape review to select indicators along the causal pathway to impact. Awards may require additional indicators to capture specific types of partnerships or objectives that are prioritized in their work. Appendix A can be used as a resource to identify additional indicators for specific awards to be added to the three indicators proposed here.

MOMENTUM's learning questions cannot be answered by quantitative indicators alone. CAM approaches and other MEL methodologies should be drawn upon to add depth to quantitative findings and inform a more nuanced understanding to how, why, when, and for whom partnerships are driving outcomes. Appendix B provides more details on methodologies that can be used to report on chosen indicators.
In addition to the indicators provided above, it is recommended that MOMENTUM consider additional, CAM approaches to incorporate into its MEL plan:

- Partnerships are one of many strategies used by MOMENTUM awards to improve MNCHN/FP/RH outcomes. **Developing a specific causal chain for different types of partnerships** in each MOMENTUM award and/or partner country can help refine the specific areas of opportunity, gaps, and assumptions that underpin the partnership approach and can improve articulation of how achieving partnership objectives contributes to project outcomes. This may also lead to the identification of common causal chains across countries and awards which can be monitored to understand how partnerships may operate similarly or differently in different contexts. In turn, this can inform MEL approaches adopted for partnership.
- **Reflexive monitoring** can be incorporated into routine partnership practices within MOMENTUM and can be used to support the counted partnerships captured in indicator one. This approach can strengthen partnership communication, identify strengths and weaknesses within partnerships, and inform iterative changes to MOMENTUM's approach. Assumptions or progress points along the causal chain to impact could especially benefit from regular reflexive monitoring.
- **MSC** can be flexibily deployed with in-house resources and can be done in a participatory fashion with country and global partners. MSC can add richness and contextual understanding to findings from quantitative indicators. It can also be used to identify new solutions (indicator two) that have emerged through a partnership model.
- At the end of the project, **outcome mapping or contribution analysis** can further deepen an understanding of how, why, when, and in what contexts the partnership approach contributed to project outcomes and how it may have added incremental value over a non-partnership approach. These methodologies can contribute to data collection for indicators two and three by tracing the plausible contribution of the partnership in generating the counted solutions and outcomes.

The recommendations provided focus on partnership monitoring as a tool to understand how partnerships contribute to project outcomes. The landscape also identified resources for monitoring partnerships themselves, including partnership health, member satisfaction, and partnership self-assessments. For awards that would like to further incorporate this type of partnership monitoring into their MEL processes, Appendix C offers ready-made tools which may prove useful.

Finally, MOMENTUM's approach and TOC also emphasize strengthening the capacity of local and national partners to improve MNCHN/FP/RH outcomes. Although capacity building was not within the scope of the landscape review, capacity-building approaches entail close partnership with local organizations to generate outcomes. The findings of this review, particularly on effective partnerships, monitoring partnership health, and using MEL findings to improve partnership processes, may also be applicable to capacity-building partnerships developed under the project.

CONCLUSION

The landscape review identified a range of recommended practices, indicators, and approaches used across the social impact and development fields to measure, monitor, and evaluate partnerships. Although there is no one-size-fits-all approach to partnership measurement, a number of existing tools and guidance documents exist to guide partnership organizations. These resources can be used to develop tailored MEL plans that balance methodological rigor and contextual realities. The resources identified in this report should provide a useful starting point for implementing organizations and projects such as MOMENTUM that aim to develop or improve their partnership measurement strategies.

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APPENDIX A. INDICATORS IDENTIFIED BY THE LANDSCAPE REVIEW

This appendix catalogues available indicators for partnerships identified by the landscape review. MOMENTUM awards that desire additional partnership indicators may find the table below useful for selecting customized indicators for adaptation, in addition to the three standardized indicators to be used across all MOMENTUM projects. Additional projects or programs may also find these indicators useful to adapt to their context.

Indicator	Data Type	Data Source & Methodologies	Disaggregation	Frequency
Compliance Indicators				
Number of active regional malaria initiatives and the Number of regional public/private sector malaria initiatives established[95]	Quantitative – count*	Project documents*	By geography*	Annual or semi-annual*
Number of global advocacy engagements in support of improved availability of essential health commodities[96]	Quantitative – count*	Project documents	By task order	Semi-annual
Institutions following public-private partnership model[97]	Quantitative – count	Project documents*	By geography* By service (technical area)*	Annual or semi-annual*
Number and type of institutions/organizations that are members of the network[98]	Quantitative – count*	Project documents*	By type of organization* By geography*	Annual or semi-annual*
Meeting participation rates, by partner[99]	Quantitative – ratio* *Meetings with partner present/ total meetings where partner was invited*	Program documentation – meeting minutes	Type of partner	Semi-annual
Number of partners present at relevant meetings[100]	Quantitative – count*	Program documentation – meeting minutes	Type of partner* Type of meeting*	Semi-annual
Number of top-10 registered corporations in the national tax base that invest in malaria prevention and control for the company's workforce or the broader community, or both[101]	Quantitative – count	Interviews with companies	None	Annual
Annual assessment of number of partners per setting[102]	Quantitative – count	Program documentation – partnership roster	By setting By area	Annual

			By population	
Process Indicators				
Proportion of partners engaged in activities[103]	Quantitative – ratio* *Partners engaged in one or more activities/total partners*	Program documentation – workplans, reports*	Type of partner* Type of activity*	Annual or semi-annual
The key roles and responsibilities of partners are met[104]	Binary (yes/no)* or quantitative – ratio* *Partner responsibility met/total expected partner responsibilities*	Program documentation – workplans, reports* Verification through interviews with project and partner staff*	By partner*	Annual or semi-annual*
Numberof shared outcomes or metrics identified by partners in alliance MOU[105]	Quantitative – count*	Project documentation – workplans* Survey or interviews with partners may be helpful for triangulation or if secondary data is not available*		Annual*
Leverage ratio – public versus private[106]	Quantitative – ratio *Public sector financial contribution / private sector financial contribution*	Project documentation – budgetary details* Survey or interviews with partners may be helpful for triangulation or if secondary data is not available.*	By service (technical area)* By geography*	Annual*
Leverage resources – project versus partner[107]	Quantitative – ratio Main source of project funding /	Project documentation – budgetary details* Survey or interviews with partners may be helpful for triangulation or if secondary data is not available.*	By service (Technical area)* By geography*	Annual*

	other financial contributions			
Percentage of planned objectives completed)[108]	Quantitative – ratio *Objectives completed/total objectives*	Program documentation – workplans, reports*		Annual or semi-annual*
Have all relevant primary players been asked to contribute, as appropriate, to the project itself?[109]	Binary (yes/no)	Survey*		Binary (yes/no)
Have appropriate roles for each individual actor been identified? (yes/no)[110]	Binary (yes/no)	Survey*		Binary (yes/no)
Number of operational guidelines developed and adopted to facilitate partnership activities[111]	Quantitative – count*	Program documents Operational guidelines	Type of guideline	Annual or semi-annual
Number of joint activities to produce knowledge management KM outputs[112]	Quantitative – count*	Program documents – workplans, project outputs	Type of product	Semi-annual
Level of satisfaction with the overall partnership[113]	Quantitative or qualitative	Survey responses (e.g., Likert scale) Key informant interviews Focus group discussions		Occasionally or after major project milestones
Rating of the coordination roles and responsibilities undertaken by the leadership and management body in the partnership[114]	Quantitative or qualitative	Survey responses (e.g., Likert scale) Key informant interviews Focus group discussions		Occasionally or after major project milestones
Level of commitment and support for shared vision[115]	Quantitative or qualitative	Survey responses (e.g., Likert scale) Key informant interviews Focus group discussions		Occasionally or after major project milestones
The network is generating new knowledge and/or repackaging new knowledge[116]	Quantitative or qualitative*	Survey responses (e.g., Likert scale) Key informant interviews Focus group discussions	By service (technical area)*	Occasionally or after major project milestones

Joint research on projects (i.e., co-authorship)[117]	Quantitative – count*	Program documents – outputs	By service (technical area)*	Annual or semi-annual*
Number of spin-off collaborations[118]	Quantitative – count, coupled with qualitative description of changes*	Sub-award reports* Survey* Interviews* * Application of Appreciative Storytelling, SNA, MSC, contribution analysis, or outcome mapping approaches*	By service (technical area)* By geography*	Annual*
New approaches to address challenging problems[119] ***(Note: This indicator was recommended for MOMENTUM's use in adapted form.)***	Quantitative – count, coupled with qualitative description of changes*	Program documentation – reports* Interviews with partners* Application of appreciative storytelling, SNA, MSC, contribution analysis, or outcome mapping approaches*	By service (technical area)* By geography*	Annual or end of project*
Incremental Value or Contribution				
Percent change or incremental number of constituents served via the program using the alliance approach relative to a non-alliance project of a similar nature[120]	Quantitative – ratio or count	Program documentation of reach* Household survey with a comparison area or historical trendline to determine non-alliance approaches*	By service (technical area)* By geography* By partnership*	Annual or end of project*
Percent change or incremental number of additional geographical areas covered via the program using the alliance approach relative to a non-alliance project of a similar nature[121]	Quantitative – ratio or count	Program documentation of reach* Household survey with a comparison area or historical trendline to determine non-alliance approaches*	By service (technical area)* By partnership*	Annual or end of project*
Percent change in number of program constituents who achieve desired outcome relative to non-alliance approach[122]	Quantitative – ratio	Program documentation* Interviews with beneficiaries* Household surveys with a comparison area or historical trendline to determine non-alliance approaches*	By service (technical area)* By geography* By partnership*	Annual or end of project*
Percent change in cost per outcome (or per beneficiary) relative to non-alliance approach[123]	Quantitative – ratio	Budgetary data*	By service (technical area)*	Annual or end of project*

		Requires comparison area or historical trends*	By geography* By partnership*	
Percent change in delivery time per outcome relative to non-alliance approach[124]	Quantitative – ratio	Program documentation Interviews with beneficiaries* Household surveys with a comparison area or historical trendline to determine non-alliance approaches*	By service (technical area)* By geography* By partnership*	Annual or end of project*
Number/percentage of partner organizations learning new and valuable information/knowledge produced from partnership activities[125]	Quantitative – ratio or count	Survey responses (e.g., Likert scale) Interviews	Type of activity Type of partner	Annual
Number/percentage of partner organizations using information/knowledge produced from partnership activities[126]	Quantitative – ratio or count	Survey responses (e.g., Likert scale) Interviews	Type of activity Type of partner	Annual
What added value do members perceive from their participation in the network?[127]	Qualitative	Surveys with open ended responses* Key informant interviews Focus group discussions		Annual or semi-annual*
Number of constituents with increased access to products and services through commercial channels[128]	Quantitative – count	Program documentation – reports or monitoring data Household survey*	Type of product or service (technical area)* Geography*	Annual or end of project*
Perception of members that their knowledge on issues under investigation has increased thanks to their participation in the network[129]	Quantitative – scale* or Qualitative*	Survey with 1-5 Likert scale* Interview* Focus group discussion* MSC or appreciative storytelling*		

Outcome Indicators				
Achievement of intermediate and final outcomes produced by collaborative activities[130]	Quantitative – ratio* *Number of outcomes achieved/total number of outcomes expected or planned* Coupled with qualitative description of changes*	Program documentation – project reports* Key informant interviews*	By technical area* By geography*	Annual or semi-annual*
Changes through partnership intervention[131] ***(Note: This indicator was recommended for MOMENTUM's use in adapted form.)***	Quantitative – count, coupled with qualitative description of changes*	Program documentation Interviews* Annual focus groups to collect success stories Application of MSC, contribution analysis, or outcome mapping approaches*	By technical area* By geography*	Annual or end of project

**Content marked with an asterisk was completed by the author based on the indicator identified through the landscape review and represent hypothesized data, sources, disaggregation, and frequency.*

APPENDIX B. METHODOLOGIES FOR PARTNERSHIP MEASUREMENT

This appendix provides additional guidance and analyzes the strengths and weaknesses of different methodologies for partnership measurement. The cited resources for each method provide useful how-to guidance that can be helpful to implementers.

Methodology	Common Purposes / Types of Questions It Can Answer	Types of Indicators & Data Sources	Strengths	Weaknesses
Specific MEL approaches applied to partnerships				
Outcome mapping*	• Can be used across the MEL continuum. • Able to answer process, outcome, and learning questions. • Can be a standalone approach or used to inform TOC development.	• Process, incremental value/contribution, and outcome metrics. • Frequently qualitative or mixed methods. Can draw on primary and secondary data. • Requires longitudinal data– for example, program documentation, journals, or change logs– that can track changes over time.	• Builds a contribution argument toward outcome and impact. • Emphasizes learning and flexibility and is particularly suited to complex initiatives. • Can be done at the end of a project or on an ongoing basis. • Can guide project implementation by identifying if partners are meeting progress markers.[132] • Participatory method.	• Intensive approach that is challenging to implement project wide. • Requires “skilled facilitation as well as dedicated budget and time, which could mean support from higher levels within an organization.”[133]
Most significant change (MSC)*	• Monitoring and learning questions. • Can contribute to evaluative questions. • Useful when determining outcomes that are not pre-defined, unexpected, or missing on a TOC.	• Process, incremental value/contribution, and outcome metrics. • Qualitative primary data, usually generated through interviews.	• Improved understanding of the partnership from the members’ voices.[134] • Can add richness to an evaluation. • Can support internal and external communications about a partnership.	• Ability to harvest stories depends on skills and relationships of the data collector. • Subjective approach subject to biases; pairing MSC with quantitative methodologies can lessen this.[135]
Appreciative story telling	• Learning questions. • Can be embedded into larger evaluations or	• Process, incremental value/contribution indicators. • Qualitative primary, usually generated through interviews.	• Facilitates internal learning and dialogue in a positive manner. • Supports continued visioning and objective setting among partners.	• Best used during the partnership–of limited retrospective value.[138] • Similar to MSC, is subjective and can be

Also called ***appreciative inquiry***	monitoring approaches.		• Can build trust and strengthen partnerships.[136] • Emphasizes building on partnership strengths.[137]	subject to bias. Pairing with other approaches can support triangulation.
Social network analysis (SNA)* ***Actor mapping****, an approach to identify actors and their relationships to one another, is a less intensive approach that could be used instead of a SNA.*	• Learning and evaluative questions. • Can be used to explore the role of context in partnerships.	• Incremental value/contribution, outcome metrics. • Mixed-methods approach. • Often requires primary data from surveys and interviews.	• Works well when the goal is to evaluate dimensions of a network, consortium, or other complex partnerships involving many layers of stakeholders. • Systems perspective. • Can identify "hidden sources of influence" and/or the "roles of diverse stakeholders."[139]	• Often requires a specialized skillset, dedicated resources, and software programs. • Can be more resource intensive.
Reflective monitoring *This is a similar approach to* ***pause and reflect*** *or* ***pause and learn*** *by USAID.**	• Monitoring and learning questions. • Useful when considering what went well and what did not go well immediately after an activity.	• Process metrics. • Can use quantitative or qualitative primary data. • Often a facilitated discussion among partners, but short surveys can also be administered.	• To guide internal learning and iterative improvements. • Can be used for smaller-scale engagements like partnership meetings or joint events.[140] • Participatory.	• Requires facilitation, openness, and participant engagement.
Contribution analysis*	• Evaluative questions.	• Contribution, outcome metrics. • Mixed methods, can include primary and secondary data.	• Can be used to accompany an endline evaluation or as part of the learning process.	• Ideally, requires a well-defined TOC and can be less robust without a pre-existing framework.

	• Focused on contribution to outcomes. • Useful for "how" questions.		• Best used in collaboration with other monitoring and learning approaches	• Time-intensive to test and validate alternative hypotheses.
Standard research approaches applied to partnerships				
Interviews	• Across the MEL spectrum. • Potentially more useful for learning and evaluative questions that are hard to quantify.	• All metrics. • Primary data collection approach.	• To capture rich description and details. • To explore phenomena not easy to quantify, or to expand on and help to interpret quantitative findings.	• Can be time consuming to collect data and analyze. • Findings are not generalizable.
Survey – pre/post or longitudinal approaches	• Across the MEL spectrum. • Potentially more valuable for monitoring and evaluative questions that are quantifiable.	• All metrics. • Primary data collection approach.	• With appropriate design can generate standardized and comparable results. • To monitor or evaluate the success of a partnership against a specific set of indicators. • Can often be administered to a large number of people efficiently through online methods.	• Requires expertise in survey design and sample size to ensure validity. • Can determine an outcome but cannot explain how or why it happened.
Survey – cross-sectional	• Across the MEL spectrum. • Potentially more valuable for learning and evaluative questions that are quantifiable.	• All metrics. • Primary data collection approach.	• To improve understanding of partnership health or take a one-time measure of effectiveness. • Can often be administered to a large number of people efficiently through online methods.	• Same weaknesses as above. • One-time measures cannot speak to evolution over time.

** Considered a complexity-aware monitoring (CAM) approach in line with USAID's collaborating, learning, and adapting (CLA) methodology. For more information on CAM approaches, see the Guide to Complexity-Aware Monitoring Approaches for MOMENTUM Projects.*

APPENDIX C. PARTNERSHIP ASSESSMENT TOOLS IDENTIFIED IN THE LANDSCAPE ANALYSIS

This appendix outlines available tools that are ready for off-the-shelf use . All tools use survey approaches.

Tool	Purpose	Methodology	Approach	Source
The Partnership Assessment Tool[141]	• Rapid assessment of partnership effectiveness. • Allows for monitoring of partnership health over time. • Can assist in overcoming barriers to partnership improvement.	• Based on six principles of partnerships. • Each principle has accompanying statements. Partners self-rate their agreement with the statement on a scale of one to four, with room to add additional comments. • Partners weight the six principles as more or less significant for their context. • Scores for each principle are summed. Guidance is provided for interpretation.	• Partners jointly agree on using the assessment tool and the rationale for doing so. • Partners complete the assessment, either on their own or with the support of a facilitator. • Analyze responses. • Discuss results.	Developed by the Nuffield Institute for Health. Accessible here.
Wilder Collaboration Factors Inventory[142]	• Freely accessible online survey tool to assess collaboration.	• Forty-four collaboration factors are grouped into six categories • Online, self-administered survey instrument. • Responses are scored on a 1-5 Likert scale. • Scores are averaged.	• No approach specified. • Can administer the group survey to all members of the partnership.	Developed by the Wilder Foundation. Accessible here.
CoalitionsWork[143]	• Can assess the performance of a collation or partnership.	• Five components of coalitions are measured. • Self-administered survey tool. • Responses scored 1-5 on a Likert scale; some questions allow for short-answer feedback. • No guidance on analysis or scoring	• No approach specified. • Can administer the group survey to all members of the partnership. • Accompanying resources from CoalitionWork are extensive and can support all phases of coalition development.	Developed by CoalitionsWork. Full suite of tools, including survey, accessible here.
PARTNER Platform[144]	• A licensed software to support the	• Online data collection and analysis tool for network and relationship data, used by health and social-impact organizations.	• Can be used to assess how network collaboration links to project outcomes.	Developed by Visible Network Labs with support from the

	development of network analyses.	• Includes a relationship management platform, metrics for networks, and tools to map network connections and create data visualizations.	• Software is available via a licensing fee.	Robert Wood Johnson Foundation. Available for demo and purchasing here. Resources for implementation found here.
Partnership Health Check[145]	• To support regular pulse checks on how a partnership is proceeding and support process improvements.	• Self-administered survey tool. • Responses scored 1-3 on a red-yellow-green stoplight scale. • No guidance on analysis or scoring.	• Step one: Survey is self-administered by all partners. • Step two: Review workshop with all partners to present results, talk through the findings, and discuss improvements. • Step three: Follow-up on improvements with all partners.	Tool is available on pgs. 39-40 of the Better Together guidebook, developed by The Partnering Initiative.
QualityMeasures™ *Partnership Effectiveness Continuum*[146]	• Designed to support internal learning, reflections, and adjustments to develop effective partnerships.	• Six dimensions of effective partnership are outlined, with criteria for each. • Responses are scored 1-4 on a Likert scale. • No guidance on analysis or scoring.	• No specific process guidance is provided.	Developed by Education Development Center for the education sector. Accessible here.
Partnership network survey[147]	• To conduct network analysis and partner self-assessment of the value of partnerships.	• Based on organizational network theory and methodology. • Data-collector administered survey tool accompanied by key informant interviews. • Uses a 1-4 Likert scale for network questions and binary responses for partnership value.	• No specific process guidance is provided.	Developed by Kamya et al. Accessible here; supplementary file one includes the interview guide and supplementary file two includes the partnership survey.

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