Evaluating Education-Business Partnerships.

Value Assessment Process Workbook

A decision-making tool to help establish partnership objectives and assess value

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Acknowledgements

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What is the Value Assessment Process?

The Value Assessment Process (VAP) helps current and prospective partners set objectives for their involvement in education–business partnerships, and assess how well their partnerships achieve these objectives. VAP's format and process:

- Help educational institutions and businesses compare their partnerships' current and potential value;
- Provide partners with valuable information as they look to improve their partnerships;
- Help partners ensure that their involvement in education–business partnerships supports their organizational missions and mandates.

VAP is a decision-making tool that helps partners establish what they really want to achieve from the partnership, clarify priorities, and identify how all partners can benefit. VAP also helps them evaluate how well partnerships achieve their objectives. Specifically:

- Educators can use VAP to set educational objectives for their partnership with business and relate them to overall institutional strategy.
- Businesses can use VAP to set business objectives for their partnership with education and relate them to their corporate strategy.
- VAP helps both partner groups develop common or corresponding objectives, making it easier to align efforts to achieve positive results.

Education–Business Partnerships Defined

Education–business partnerships are mutually beneficial, cooperative relationships between one or more educational institutions (including elementary and secondary schools, universities, colleges, polytechnics, CEGEPs, and other institutions) and one or more businesses. They may involve others as partners and participants, including students, employees, parents, community groups, labour, and government organizations. Partners share obligations, objectives and contributions to support and enhance educational activities and business needs.

A Catalyst for Engagement

By providing a framework for dialogue, VAP acts as a catalyst. It helps partners engage in focused discussions about what outcomes they seek and which programs or activities could achieve those results. It can stimulate candid discussion of the validity of objectives, the effectiveness of programs, and help partners discover their shared interest and intentions, as well as their differences. Finally, VAP can help partners achieve continuous improvement by identifying where best to allocate resources and encouraging performance measurement. Above all, it gets partners to think seriously about what they are doing and what they ought to be doing.

The Conference Board of Canada, the Centre for Skills and Post-Secondary Education, and the International Partnership Network invite and encourage educational institutions, businesses, non-profit organizations, governments, community groups, and others to use VAP as a basis for setting partnership objectives and assessing partnership value.

Benefits of Value Assessment

The Value Assessment Process incorporates three well-established management practices:
1) defining desired outcomes and expressing them as objectives, 2) setting up activities to reach the defined objectives, and 3) measuring the results.

Education and business partners can realize numerous benefits by using VAP. With it, they can:

1. Improve Objective Setting
   - Facilitate objective setting for all stakeholders.
   - Enable organizations to develop organization-wide objectives.

2. Identify Effective Programs
   - Provide structure for analysis, which leads to better judgments about programs.
   - Identify opportunities for effective action to increase partnership program value.
   - Screen out unwanted or ineffective programs and activities.
   - Link programs explicitly with objectives.

3. Enhance Decision Making
   - Lead prospective partners to assess their programs against defined objectives.

4. Encourage Program Replication
   - Identify those programs and activities that have been successful.

5. Improve Performance Management
   - Provide a framework for benchmarking.
   - Establish a basis for evaluation and cost-effective measurement.
   - Clarify the scale of partners' involvement and costs.
   - Focus stakeholders on improving results.

6. Promote True Partnerships
   - Create a basis for dialogue and encourage development of a shared vocabulary about activities and outcomes that reduce confusion.
   - Promote aligned education–business collaboration by encouraging business people and educators to develop corresponding objectives.
   - Promote true partnership by asking partners to consider one another's perspectives when setting objectives.

7. Increase Internal Support for Partnership Programs
   - Increase internal organizational understanding of the value of regular assessments and rationalize decision-making.
   - Help individuals recognize the importance of their participation in education–business partnerships.

Using the Value Assessment Process

Before initiating a partnership, each partner organization ought to consider why it wants to pursue an education–business partnership and should seek to express its reasons in operational terms.

One way to do this is through a visioning exercise. Some organizations find it useful to conduct a visioning exercise before setting objectives and assessing programs. Visioning asks you to examine current realities and to develop a shared view of a desired future state.

The results of the assessment process are not intended to bind participants. Rather, they are designed to guide the dialogue and to complement detailed program measurement.

The VAP Workbook

As a partnership practitioner, you will begin by setting objectives, and then perform the value assessment at appropriate points throughout the life of your partnership. VAP can help you identify and select the right partners and partnerships to become involved with and/or maintain.

Performing a value assessment at the beginning of a partnership helps to establish a baseline (objectives, desired outcomes, anticipated activities, performance targets) against which you can track subsequent performance and measure outcomes. Using the VAP throughout the life of your partnership helps you to keep programs and activities on track and aligned with all partners' objectives and values.

This VAP Workbook consists of three main parts:

1. **Education Partners (EPs)**
   • Set and Rank Partnership Objectives (Section 1: Steps 1–5) Module 1
   • Assess Current and Potential Partnership Value (Section 2: Steps 6–17) Module 1

2. **Business Partners (BPs)**
   • Set and Rank Partnership Objectives (Section 3: Steps 1–5) Module 2
   • Assess Current and Potential Partnership Value (Section 4: Steps 6–17) Module 2

3. **Both Education and Business Partners (EPs and BPs)**
   • Map and Share Scores (Section 5: Steps 18–20) Module 3
   • You can use VAP in conjunction with other methods of partnership evaluation (e.g., Return-On-Investment analysis, satisfaction surveys, fulfillment of objectives). Partners are encouraged to adjust the VAP process to suit their unique needs. It is designed to be completed by one or more participants/partners involved in a partnership.)

EPs   Module 1:   **Sections 1 and 2**

EPs complete Section 1 and 2 (Steps 1–17) to arrive at their own partnership objectives and partnership value scores.

They then proceed to Chapter 4: Section 5 (Steps 18–20).

BPs   Module 2:   **Sections 3 and 4**

BPs complete Section 3 and 4 (Steps 1–17) to arrive at their own partnership objectives and partnership value scores.

They then proceed to Chapter 4: Section 5 (Steps 18–20).

EP+BPs Module 3:   **Section 5**

EPs and BPs complete Section 5 of this VAP Workbook (Steps 18–20) together.

They share their partnership value scores and use the Value Assessment Map to determine levels of mutual benefit and value.

Using a Facilitator for Group Participation in the VAP

VAP enables multiple partners from education and business to cooperate in setting objectives and assessing value. Many find it helpful to use a knowledgeable neutral third-party facilitator (with no affiliations to an organization, and who will not impose value judgments) to manage the value assessment process and help the groups come to their own decisions. A facilitator can organize discussions, keep conversations focused, and help participants reach decisions on objectives, mutual benefit, and desired outcomes.

Facilitators are particularly helpful in *four critical* areas:

Developing and rating partnership objectives Modules 1 and 2 (Steps 1–2);

Ranking partnership objectives Modules 1 and 2 (Steps 3–4; 6–8);

Calculating and comparing partnership value scores Modules 1 and 2 (Steps 10–12; 15–17);

Mapping scores and costs Module 3 (Steps 18–19).

Education Partner Worksheets

What's Inside

Section 1: Set and Rank Partnership Objectives
Section 2: Assess Current and Potential Partnership Value

Section 1: EPs Set and Rank Partnership Objectives

To be completed by Education Partners (EPs) only.
(Business Partners (BPs) begin at Section 3)

EPs: Set and Rank Objectives for Your Education–Business Partnership(s)

Set and rank, in order of importance, objectives for involvement in education–business partnerships.

Rate objectives on their importance to education and business partners.

When both education and business partners are present, they may choose to begin with facilitated breakout sessions–independently of one another–to discuss objective setting before proceeding to Step 1.

Setting and Ranking Partner Objectives

If you are an EP who wishes to set objectives, you may want to invite BPs to discuss business issues before you set your objectives independently. You may choose to invite BPs to participate in developing objectives.

- As a general rule, when setting objectives it is best to hold early dialogue with potential partners:
  - Educators may want to discuss potential collaborative activities with business partners to learn about their value to business, after which the partners can set their objectives separately.
  - Educators may want to discuss their objectives with business partners before finalizing them, making changes as appropriate. This is helpful in aligning efforts and developing corresponding objectives.

- Objectives should be focused (not too narrow or generic), and embody desired future states or outcomes

- Objectives should be measurable and express the benefits of partnership in terms of measurable results (e.g. increasing experiential learning activities of students, or reducing the amount of basic-skills training requirements for entry-level employees).

- While you and your partners should be interested in achieving common or corresponding objectives, these need not be identical. Nevertheless, bear in mind that if the objectives are too different, you will lack the alignment you need to achieve desired results.

- If you and your partners are not prepared to clarify and develop objectives that at least partly correspond, you may not want to work together. The decision to be or to continue to be partners is a difficult—yet key—one. Collaboration can succeed only when the fit is right.

- At every stage, dialogue is important. Once you and your partners identify and agree on education and business objectives, you may find it helpful to schedule regular, perhaps annual, meetings to discuss and reappraise the alignment of your objectives.

EPs: List and Rate Partnership Objectives (Steps 1–2)

In this section, EPs list and rate their partnership objectives. One or more participants can undertake Steps 1–2.

Listing and Rating Partnership Objectives

Step 1

Each participant makes a list of five or fewer objectives for your involvement in the partnership, keeping in mind the needs of your stakeholders (e.g., students, other educators, the community, the school).

- Sample objectives are: "assess and develop students' employability skills"; "strengthen co-op links between college and businesses."
- Record all education objectives on a flip-chart. Reduce the list by combining duplicates, or placing related objectives under major headings, as appropriate.
- If the list is long, you can each vote for your top-five education objectives, in no particular order. Collect the votes and list the top five (those with the most votes).
- Transfer the top 5 objectives to Table E1 (fewer if there are fewer objectives).

Step 2

Using Table E1, participants assign each objective an Education Rating (1–5) and a Business Rating (1–5). This rating should be based on the importance each objective has to the education stakeholders and the business stakeholders, respectively.

- For each objective, the maximum rating is 5, the minimum rating is 1. (Note: more than one objective can receive the same rating.) Assigning the two ratings allows education partners to better understand their own and their business partners' needs.
- For each objective, education participants then multiply the Education Rating by the Business Rating to obtain a Combined Rating of Importance. (See Table E1.)

Table E1
EPs: Objectives for Involvement in Education–Business Partnership + Importance to Education and Business Partners
(Scale 1–5, 1 = low importance; 5 = high importance)

EPs' Objectives of Partnership Involvement	Importance to Education Partner (Rating:1–5)	Importance to Business Partner (Rating:1–5)	Combined Rating of Importance (Education Rating x Business Rating) (Rating: 1–25)
1			
2			
3			
4			
5			

The Role of a Facilitator

Facilitators can:

- Explain the purpose of the assessment process and outline the steps involved prior to Step 1.
- Help the EPs explore and identify the outcomes and objectives they want to achieve from the partnership.
- Encourage the EPs to consider what they believe to be the business partners' core objectives and desired outcomes. Questions a facilitator might ask include: "What do you, as the education partner, want to achieve or gain from the partnership?" "What do your business partners want to gain or achieve?"
- Help the EPs think about the importance that each partner places on a particular objective (i.e., the mutual benefit or value).
- Separate EPs and BPs (when present) into SSEducators develop education objectives for involvement with business. Business participants develop business objectives for involvement in education. Each considers the importance of their objectives to both business and education.

Notes and Observations

EPs: Organize and Rank Partnership Objectives (Steps 3–5)

Once Table E1 is complete, EPs organize and rank their top education objectives.

Organizing and Ranking Partnership Objectives

Step 3

On Table E2, record the objectives in the first column. Enter each participant's combined ratings beside each objective. Record the first participant's combined ratings in Column 1, then continue with the others.

Add the combined ratings of all participants to obtain a total combined rating for each objective.

The Role of a Facilitator

A facilitator can help rank the objectives and calculate the ranking scores.

Step 4

List the objectives in order, from highest to lowest total combined rating.

Step 5

Assign a numerical ranking for each objective. The objective with the highest total combined rating gets the highest numerical ranking equal to the number of objectives.

- For example: with five objectives, the highest ranking value is five, the second highest is four, the third highest is three, etc.
- Note: In the case of tied combined rating scores, participants should prioritize the order of importance of objective and assign numerical rankings accordingly.

Table E2
EPs: Objectives and Ranking Scores

Objectives	Participants' Combined Ratings								Total Combined Rating	Numerical Ranking
	1	2	3	4	5	6	7	8		

Next: Go to Section 2

EPs proceed to Section 2 to assess the current and potential value of their partnership programs.

Section 2: EPs Assess Partnership Value

To be completed by EPs only.

EPs: Assess Current and Potential Value of the Partnership (Steps 6–17)

In this section EPs assess the current and potential value of their partnership, according to how well a program/activity achieves the partnership objectives established in Section 1. The assessment rankings are used to map partnership program values on a two-dimensional Value Assessment Map (Section 5) where gaps between a program's current and potential value can be examined.

Assessing Partnership Programs

Dialogue

Like objective setting, program assessment begins with an open dialogue. Discussion helps participants identify the key questions they need to ask and answer in order to make valid assessments, including:

- What do we want to accomplish?
- What will we accept as a measure of accomplishment?
- What activities are we prepared to undertake?
- Do we have sufficient resources to act effectively?

Some organizations first may choose to assess general categories of activity against their objectives to determine where their relative advantage lies, then start specific programs or activities in the chosen categories and set measurements. Initial assessment will establish a baseline against which subsequent performance can be tracked.

Program Documentation

To facilitate program assessment, participants are encouraged to use a Partnership Program Summary Document. The summary document (a completed sample and blank template are found in Appendix 1) should include partnership information, an overview of partnership programs and activities, resource commitments, partnership outcomes and benefits, and evaluation tools used. The Summary Document helps:

- Create a basis for dialogue and encourage the development of a shared vocabulary to reduce confusion;
- Clarify understanding of the partnership program, and the scale of each partner's involvement and costs;
- Provide a basis for evaluation and cost-effective measurement; and
- Establish a framework for benchmarking.

By using the completed Partnership Program Summary Document, along with other information, you can assess a partnership program's value by rating how well it achieves each objective. This rating may be based on personal perception, on qualitative or quantitative measures, or some combination of the two.

Assessing Current and Potential Value of Partnership Programs

EPs first assess the *current* value of their partnership (using Steps 6–11) by giving a rating to each objective. EPs repeat the process (Steps 12–17), this time assessing the potential value of the partnership (e.g., what they believe could be achieved with further or increased efforts).

Scores are marked on the Value Assessment Map (Section 5) and the program cost can be indicated. To make decisions about program support, examine the gap between current and potential value. Use the same process to assess proposed programs and to determine whether a program under consideration, but not yet implemented, is likely to work.

Section 2.1: EPs Assess Current Partnership Value

EPs: Assess Current Value of the Partnership (Steps 6–8)

In this section, EPs assess how well the partnership is achieving their current objectives identified in Steps 3–5. (One or more participants.)

Assessing Current Value

Step 6
Each participant completes Table E3, below.

First, list the objectives from Table E2 (Section 1) in order of numerical ranking, from highest to lowest. Enter the numerical ranking in the left-hand column.

Step 7
Next, self-rate the partnership's current effectiveness in achieving each objective, using a scale of 1 to 5, (5 highest; 1 lowest). Record these under the "Current Rating" column in Table E3. More than one objective can have the same rating.

Step 8
For each objective, multiply the numerical ranking by the current rating, to obtain a current assessment score.

Add the current assessment scores for all objectives to obtain a raw score for the partnership.

The Role of a Facilitator

For Steps 6–8, a facilitator can:

- list the partnership's education objectives and current ratings;
- obtain current assessment scores for each objective; and
- calculate the raw score.

Table E3
EPs: Current Value of Partnership to Education

Name of Partnership Program

Numerical Ranking	Education Objective	Current Rating	Current Assessment Score (Numerical Ranking x Current Rating)
			Raw Score (Total the Current Assessment Scores) _____

EPs: Assess Current Value of the Partnership (Steps 9–11)

In this section, EPs add up and scale the partnership's current value scores.

Scaling Partnership Value Scores

Step 9

In Table E4 record each education participant's name and raw score from Table E3.

Step 10

Add the raw scores to obtain the total raw score, then divide by the number of scores to obtain the average raw score. If only one participant is involved, the participant's raw score becomes the average raw score.

Step 11

Using Table E5 as a reference, scale the average raw score in Table E4. For example, with five objectives, subtract 15 from the average raw score, then divide by 20 to obtain the scaled score. This score will be a value normalized to a scale of 1 to 3.

The Role of a Facilitator

For Steps 9–11, a facilitator can obtain the average raw scores and scaled scores of the partnership's objectives.

Table E4
EPs: Current Value of Partnership to Education

Partnership Name	
Participant's Name	Raw Score
Total Raw Score	
Average Raw Score (Total Raw Score divided by number of scores)	
Scaled Score (Use calculations in Table 5, based on the number of objectives)	_____

Table E5
Scaled Score Calculation Table

Partnership Name			
Number of Objectives	Average Raw Score Range	Subtract	Divide by:
5	15–75	15	20
4	10–50	10	13.333
3	6–30	6	8
2	3–15	3	4
1	1–5	1	1.333

Next: Repeat for Potential Value

Continue by repeating the same process in Section 2.2 to assess the *potential* value of partnerships (Steps 12–17), or what EPs believe could be achieved with further or increased efforts.

Section 2.2: EPs Assess Potential Partnership Value

EPs: Assess Potential Value of the Partnership (Steps 12–14)

In this section, EPs repeat the assessment process to determine the *potential* value of the partnership, based on what partners believe could be achieved with further or increased efforts.

Assessing Potential Value

Step 12
Each participant completes Table E6, below.

Once again, list the objectives from Table E2 (Section 1) in order of numerical ranking, from highest to lowest. Enter the numerical ranking in the left-hand column.

Step 13
Next, self-rate the partnership's *potential* effectiveness in achieving each objective, using a scale of 1 to 5, (5 highest; 1 lowest). Record these under the Potential Rating column in Table E6. More than one objective can have the same rating.

Step 14
For each objective, multiply the numerical ranking by the potential rating, to obtain a potential assessment score.

Add the potential assessment scores for all objectives to obtain a raw score for the partnership.

The Role of a Facilitator

A facilitator can list the partnership's objectives and potential ratings and obtain the assessment potential scores for each objective.

Table E6
EPs: Potential Value of Partnership to Education

Name of Partnership Program

Numerical Ranking	Education Objective	Current Rating	Potential Assessment Score (Numerical Ranking Score x Potential Rating)
			Raw Score (Total the Potential Assessment Scores) _____

EPs: Scale Partnership Value Scores (Steps 15–17)

In this section, EPs add up and scale the partnership's potential value scores.

Scaling Partnership Value Scores

Step 15
In Table E7 record each education participant's name and raw score from Table E6.

Step 16
Add the raw scores to obtain the total raw score, then divide by the number of scores to obtain the average raw score. If only one participant is involved, the participant's raw score becomes the average raw score.

Step 17
Using Table E8 as a reference, scale the average raw score in Table E7. For example, with five objectives, subtract 15 from the average raw score, then divide by 20 to obtain the scaled score. This score will be a value normalized to a scale of 1 to 3.

The Role of a Facilitator

For Steps 15–17, a facilitator can obtain the average raw scores and scaled scores of the partnership's objectives.

Table E7
EPs: Potential Value of Partnership to Education

Partnership Name	
Participant's Name	Raw Score
Total Raw Score	
Average Raw Score (Total Raw Score divided by number of scores)	
Scaled Score (Use calculations in Table 5, based on the number of objectives)	_____

Table E8
Scaled Score Calculation Table

Partnership Name			
Number of Objectives	Average Raw Score Range	Subtract	Divide by:
5	15–75	15	20
4	10–50	10	13.333
3	6–30	6	8
2	3–15	3	4
1	1–5	1	1.333

Next: Go to Module 3, Section 5, to Map Scores and Costs
With a scaled score between 0 and 3 for both the current and potential value of the partnership, proceed to Section 5. Use the Value Assessment Map to compare partnership value and costs with BPs (who have completed Sections 3 and 4 of the Workbook).

MODULE 2

Business Partner Worksheets

What's Inside

Section 3: Set and Rank Partnership Objectives
Section 4: Assess Current and Potential Partnership Value

Section 3: BPs Set and Rank Partnership Objectives

To be completed by Business Partners (BPs) only.
(Education Partners [EPs] complete Sections 1 and 2)

BPs: Set and Rank Objectives for Your Education–Business Partnership(s)

Set and rank, in order of importance, objectives for involvement in education–business partnerships.

Rate objectives on their importance to business and education partners.

When both business and education partners are present, they may choose to begin with facilitated breakout sessions—independently of one another—to discuss objective setting before proceeding to Step 1.

Setting and Ranking Partner Objectives

BPs wishing to set objectives may want to invite EPs to discuss education issues with them before setting their objectives independently. Some may want to invite EPs to participate in the actual objective setting.

- As a general rule, when setting objectives it is best to hold early dialogue with potential partners:
  - Businesses may want to discuss potential collaborative activities with education partners to learn about their value to education, after which the partners can set their objectives separately.
  - Businesses may want to discuss their objectives with education partners before finalizing them, making changes as appropriate. This is helpful in aligning efforts and developing corresponding objectives.

- Objectives should be focused (not too narrow or generic), and embody desired future states or outcomes.

- Objectives should be measurable and express the benefits of partnership in terms of measurable results (e.g., increasing experiential learning activities of students, or reducing the amount of basic-skills training requirements for entry-level employees).

- While you and your partners should be interested in achieving common or corresponding objectives, these need not be identical. Nevertheless, bear in mind that if the objectives are too different, you will lack the alignment you need to achieve desired results.

- If you and your partners are not prepared to clarify and develop objectives that at least partly correspond, you may not want to work together. The decision to be or to continue to be partners is a difficult—yet key—one. Collaboration can succeed only when the fit is right.

- At every sage, dialogue is important. Once you and your partners identify and agree on education and business objectives, you may find it helpful to schedule regular, perhaps annual, meetings to discuss and reappraise the alignment of your objectives.

BPs: List and Rate Partnership Objectives (Steps 1–2)

In this section, BPs list and rate their partnership objectives. These steps can be undertaken by one or more participants.

Listing and Rating Partnership Objectives

Step 1

Each participant makes a list of five or fewer objectives for your involvement in the partnership, keeping in mind the needs of your stakeholders (e.g., employees, management, board of directors, the community, organizational performance).

- Sample objectives: "enhance the link between education and the world of work," "help develop students' skills," "help businesses solve real-world problems," or "develop the skills of employees."
- Record all business objectives on a flip-chart. Reduce the list by combining duplicates, or placing related objectives under major headings, as appropriate.
- If the list is long, participants can vote for their top-five business objectives, in no particular order. Collect the votes and list the top five objectives (those with the most votes).
- Transfer the top five objectives to Table B1 (fewer if there are fewer objectives).

Step 2

- Using Table B1, participants assign each objective a Business Rating (1–5), and an Education Rating (1–5). This rating should be based on the importance each objective has to the business stakeholders and the education stakeholders, respectively.
- For each objective, the maximum rating is 5, the minimum rating is 1. (Note: more than one objective can receive the same rating). Assigning the two ratings allows business partners to better understand their own and their education partners' needs.
- For each objective, multiply the business rating by the education rating to obtain a combined rating of Importance. (See Table B1.)

Table B1

BPs: Objectives for Involvement in Education–Business Partnership + Importance to Business and Education Partners
(Scale 1–5, 1 = low importance; 5 = high importance)

BPs' Objectives of Partnership Involvement	Importance to Business Partner (Rating:1–5)	Importance to Education Partner (Rating:1–5)	Combined Rating of Importance (Business Rating x Education Rating) (Rating: 1–25)
1			
2			
3			
4			
5			

The Role of a Facilitator

Facilitators can:

- Explain the purpose of the assessment process and outline the steps involved prior to Step 1.
- Help the BPs explore and identify the outcomes and objectives they want to achieve from the partnership.
- Encourage the BPs to consider what they believe to be the education partners' core objectives and desired outcomes. Sample questions might be: "What do you, as the business partner, want to achieve or gain from the partnership?" "What do your education partners want to gain or achieve?"
- Help the BPs think about the importance that each partner places on a particular objective (i.e., the mutual benefit or value).
- Separate BPs and EPs (when present) into breakout groups, each with a facilitator. Business participants develop business objectives for involvement in education. Educators develop education objectives for involvement with business. Each considers the importance of their objectives to both education and business.

Notes and Observations

BPs: Organize and Rank Partnership Objectives (Steps 3–5)

Once they have completed Table B1, BPs organize and rank their top business objectives.

Organizing and Ranking Partnership Objectives

Step 3

On Table B2, record the objectives in the first column. Enter each participant's combined ratings beside each objective. Record the first participant's combined ratings in Column 1, then continue with the others.

Add the combined ratings of all participants to obtain a total combined rating for each objective.

The Role of a Facilitator

A facilitator can help rank the objectives and calculate the ranking scores.

Step 4

List the objectives in order, from highest to lowest, for a total combined rating.

Step 5

Assign a numerical ranking for each objective. The objective with the highest total combined rating gets the highest numerical ranking equal to the number of objectives.

- For example: with five objectives, the highest ranking value is five, the second highest is four, the third highest is three, etc.
- Note: In the case of tied combined rating scores, participants should prioritize the objective's order of importance and assign numerical rankings accordingly.

Table B2
BPs: Objectives and Ranking Scores

Objectives	Participants' Combined Ratings								Total Combined Rating	Numerical Ranking
	1	2	3	4	5	6	7	8		

Next: Go to Section 4

BPs, proceed to Section 4 to assess the current and potential value of your partnership programs.

Section 4: BPs Assess Partnership Value

To be completed by BPs only.

BPs: Assess Current and Potential Value of the Partnership (Steps 6–17)

In this section BPs assess the *current* and *potential* value of their partnership, according to how well a program/activity achieves the partnership objectives established in Section 3. The assessment rankings are used to map partnership program values on a two-dimensional value assessment map (Section 5) where gaps between a program's current and potential value can be examined.

Assessing Partnership Programs

Dialogue

Like objective setting, program assessment starts with an open dialogue. Discussion helps you identify the key questions you need to ask and answer in order to make valid assessments, including:

- What do we want to accomplish?
- What will we accept as a measure of accomplishment?
- What activities are we prepared to undertake?
- Do we have sufficient resources to act effectively?

Your organization may choose first to assess general categories of activity against your objectives to determine where your relative advantage lies, then start specific programs or activities in the chosen categories and set measurements. An initial assessment will establish a baseline against which you can track subsequent performance.

Program Documentation

To facilitate program assessment, use a Partnership Program Summary Document. (A completed sample and blank template are found in Appendix 1.) The summary document should include partnership information, an overview of partnership programs and activities, resource commitments, partnership outcomes and benefits, and evaluation tools used. The Summary Document helps:

- Create a basis for dialogue and encourage the development of a shared vocabulary to reduce confusion;
- Clarify understanding of the partnership program, and the scale of each partner's involvement and costs;
- Provide a basis for evaluation and cost-effective measurement; and
- Establish a framework for benchmarking.

By using a completed Partnership Program Summary Document, along with other information, participants can assess a partnership program's value by rating how well it achieves each objective. This rating may be based on personal perception, on qualitative or quantitative measures, or some combination of the two.

Assessing Current and Potential Value of Partnership Programs

BPs first assess the *current* value of their partnership (using Steps 6–11) by giving a rating to each objective. BPs repeat the process (Steps 12–17), this time assessing the *potential* value of the partnership (e.g., what they believe could be achieved with further or increased efforts).

Scores are marked on the Value Assessment Map (Section 5) and the program cost can be indicated. Decisions can be made about program support by examining the gap between current and potential value. The same process is also used to assess proposed programs and to determine whether a program under consideration, but not yet implemented, is likely to work.

Section 4.1: BPs Assess Current Partnership Value

BPs: Assess Current Value of the Partnership (Steps 6–8)

In this section, BPs assess how well the partnership is achieving their current objectives identified in Steps 3–5. (One or more participants.)

Assessing Current Value

Step 6

Each participant completes Table B3, below.

First, list the objectives from Table B2 (Section 3) in order of numerical ranking, from highest to lowest. Enter the numerical ranking score in the left-hand column.

Step 7

Next, self-rate the partnership's current effectiveness in achieving each objective, using a scale of 1 to 5, (5 highest; 1 lowest). Record these under the current rating column in Table B3. More than one objective can have the same rating.

Step 8

For each objective, multiply the numerical ranking by the current rating, to obtain a current assessment score.

Add the current assessment scores for all objectives to obtain a raw score for the partnership.

The Role of a Facilitator

For Steps 6–8, a facilitator can:

- list the partnership's education objectives and current ratings;
- obtain current assessment scores for each objective; and
- calculate the raw score.

Table B3
BPs: Current Value of Partnership to Business

Name of Partnership Program

Numerical Ranking	Business Objective	Current Rating	Current Assessment Score (Numerical Ranking x Current Rating)
			Raw Score (Total the Current Assessment Scores)

BPs: Assess Current Value of the Partnership (Steps 9–11)

In this section, BPs add up and scale the partnership's current value scores.

Scaling Partnership Value Scores

Step 9
In Table B4 record each business participant's name and raw score from Table B3.

Step 10
Add the raw scores to obtain the total raw score, then divide by the number of scores to obtain the average raw score. If there is only one participant, the raw score becomes the average raw score.

Step 11
Using Table B5 as a reference, scale the average raw score in Table B4. For example, with five objectives, subtract 15 from the average raw score, then divide by 20 to obtain the scaled score. This score will be a value normalized to a scale of 1 to 3.

The Role of a Facilitator

For Steps 9–11, a facilitator can obtain the average raw scores and scaled scores of the partnership's objectives.

Table B4
EPs: Current Value of Partnership to Education

Partnership Name	
Participant's Name	Raw Score
Total Raw Score	
Average Raw Score (Total Raw Score divided by number of scores)	
Scaled Score (Use calculations in Table 5, based on the number of objectives)	

Table B5
Scaled Score Calculation Table

Partnership Name			
Number of Objectives	Average Raw Score Range	Subtract	Divide by:
5	15–75	15	20
4	10–50	10	13.333
3	6–30	6	8
2	3–15	3	4
1	1–5	1	1.333

Next: Repeat for Potential Value
Continue by repeating the same process in Section 4.2 to assess the *potential* value of partnerships (Steps 12–17), or what BPs believe could be achieved with further or increased efforts.

Section 4.2: BPs Assess Potential Partnership Value

BPs: Assess Potential Value of the Partnership (Steps 12–14)

In this section, BPs repeat the same assessment process to determine the potential value of the partnership, based on what partners believe could be achieved with further or increased efforts.

Assessing Potential Value

Step 12

Each participant completes Table B6, below.

First, list the objectives from Table B2 (Section 3) in order of numerical ranking, from highest to lowest. Enter the numerical ranking score in the left-hand column.

Step 13

Next, self-rate the partnership's *potential* effectiveness in achieving each objective, using a scale of 1 to 5, (5 highest; 1 lowest). Record these under the potential rating column in Table B6. More than one objective can have the same rating.

Step 14

For each objective, multiply the numerical ranking by the potential rating, to obtain a potential assessment score.

Add the current assessment cores for all objectives to obtain a raw score for the partnership.

The Role of a Facilitator

For Steps 12–14, a facilitator can list the partnership's objectives and *potential* ratings and obtain the assessment *potential* scores for each objective.

Table B6
BPs: Potential Value of Partnership to Business

Name of Partnership Program

Numerical Ranking	Business Objective	Potential Rating	Potential Assessment Score (ranking score x rating)
			Raw Score (Total the Potential Assessment Scores) _____

BPs: Scale Partnership Value Scores (Steps 15–17)

In this section, business partners add up and scale the partnership's potential value scores.

Scaling Partnership Value Scores

Step 15
In Table B7 record each business participant's name and raw score from Table B6.

Step 16
SAdd the raw scores to obtain the total raw score, then divide by the number of scores to obtain the average raw score. If there is only one participant, the raw score becomes the average raw score.

Step 17
Using Table B8 as a reference, scale the average raw score in Table B7. For example, with five objectives, subtract 15 from the average raw score, then divide by 20 to obtain the scaled score. This score will be a value normalized to a scale of 1 to 3.

The Role of a Facilitator

For Steps 15–17, a facilitator can obtain the average raw scores and scaled scores of the partnership's objectives.

Table B7
EPs: Potential Value of Partnership to Education

Partnership Name	
Participant's Name	Raw Score
Total Raw Score	
Average Raw Score (Total Raw Score divided by number of scores)	
Scaled Score (Use calculations in Table 5, based on the number of objectives)	_____

Table B8
Scaled Score Calculation Table

Partnership Name			
Number of Objectives	Average Raw Score Range	Subtract	Divide by:
5	15–75	15	20
4	10–50	10	13.333
3	6–30	6	8
2	3–15	3	4
1	1–5	1	1.333

Next: Go to Module 3, Section 5, to Map Scores and Costs
With a scaled score between 0 and 3 for both the current and potential value of the partnership, proceed to Section 5. Use the Value Assessment Map to compare partnership value and costs with EPs (who have completed Sections 1 and 2 of the Workbook).

Education and Business Partner Worksheets

What's Inside

Section 5: Map and Share Scores; Estimate Costs

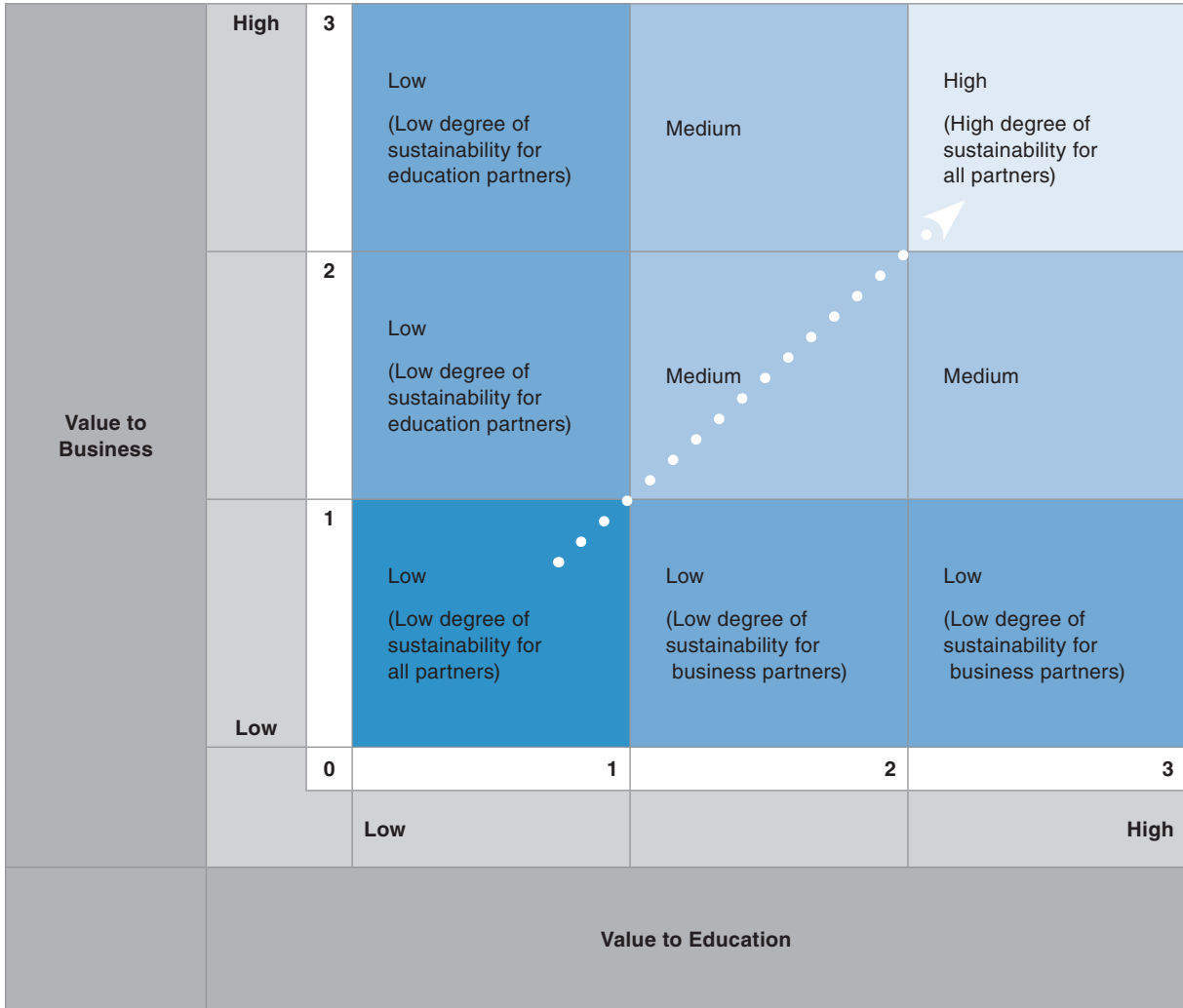## Section 5: EPs and BPs Map Partnership Scores and Costs

EPs and BPs complete this section together.

EPs and BPs: Map Value of the Partnership (Steps 18–20)

In this section, education and business partners map program values on a two-dimensional Value Assessment Map. Vertical dimension represents the program's score value to business. Horizontal dimension represents the program's score value to education. Mark scaled scores by dots on the map where the scores intersect to determine how well a partnership achieves mutual benefit.

You can use this process to map both the current and potential value of the programs.

Map Scaled Scores

Step 18

Mark scaled scores (current and potential) using different coloured dots on the Value Assessment Map (Map 1). Education and business partners share scores to compare value on the same map. Both current and potential value can be mapped.

The vertical axis represents the partnership's value to business, and the horizontal axis represents the partnership's value to education. Mark scaled scores by a dot on the map where the scores intersect.

Partners can then refer to the Mutual Benefit Diagnostic Map (Map 2) to assess the partnership's mutual benefit, and help determine partnership sustainability.

Partnership Score Index

When each partner gives the partnership a score of 2 or above, the partnership can be considered to be mutually beneficial.

Scores of 3 indicate that the partnership is achieving a very high degree of mutual benefit.

Scores below 1 indicate that the partnership is not achieving mutual benefit and is unlikely to be sustainable without changes.

Estimate Costs (Optional)

Step 19

Partners can represent program/partnership costs by the size of the rectangle placed around the mapped dots. The rectangle's vertical side represents the cost to business; the horizontal side represents the cost to education. Estimate the cost if necessary.

The Role of a Facilitator

- For Step 18, a facilitator can help to mark the scaled scores—current and potential—of each partner. The facilitator can also help partners analyze their scores and what they mean in terms of mutual benefit and sustainability.
- For Step 19, a facilitator can help partners estimate and map the current and potential cost estimates of their partnership involvement.

Assess and Compare Multiple Partnerships

Step 20

Where applicable, assess and compare results for multiple partnerships by repeating Sections 1–2 and 3–4. Doing so will foster an understanding of how well the education–business partnerships meet their objectives. Decision-makers will also get information to help them decide whether they should continue—or discontinue— to support these partnerships.

EPs and BPs: Map Value of the Partnership (Steps 18–20)

In this section, education and business partners map their current and potential value scores, as well as their partnership costs (optional step).

Map 1
Value Assessment Map: Current and Potential Value

Value to Business	High	3			
		2			
		1			
	Low				
		0	1	2	3
			Low		High
		Value to Education			

Notes and Observations

_____

_____

_____

_____

_____

_____

EPs and BPs: Map Value of the Partnership (Steps 18–20)

In this section, education and business partners use the diagnostic map to identify a partnership's current and potential value and costs (optional step).

Map 2

Mutual Benefit Diagnostic Map: Current and Potential Partnership Sustainability Index

Value to Business	High	3	Low (Low degree of sustainability for education partners)	Medium	High (High degree of sustainability for all partners)
		2	Low (Low degree of sustainability for education partners)	Medium	Medium
	Low	1	Low (Low degree of sustainability for all partners)	Low (Low degree of sustainability for business partners)	Low (Low degree of sustainability for business partners)
		0	1	2	3
			Low		High

Value to Education

Notes and Observations

_____

_____

_____

_____

_____

_____

Ongoing Action and Other Applications

Ongoing Action

Organizations can periodically use VAP to reassess both objectives and programs, after they have made the initial assessment. They can supplement VAP by effective measurements of program outcomes. One method is to create measurable indicators to determine whether objectives are being achieved; measure the indicators; and periodically examine the results to assess the cost and benefits of program.

For example, if the objective is to enhance learning opportunities, and the activity is to achieve the objective is a job-shadowing program, a measurable indicator is the number of students who successfully complete the job-shadowing program over a defined time period.

- Value Assessment is a decision-making tool.
- Value Assessment is a technique for dialogue and discovery.

Other Applications

You can use VAP, in a modified form, for other types of assessment.

Businesses and institutions can use it to assess the value of the whole range of engagement and sponsorship activities, including education, arts, health promotion, environment, community, and sports. You can, for example, base the assessment on value to the company in achieving sponsorship objectives and value to the sponsorship beneficiaries in achieving their program objectives.

Organizations can use VAP to assess the value of their communications activities. They could assess communications programs or activities, such as making speeches to teachers, against two objectives: the value they bring to achieving strategic education objectives and their value to achieving specific communications objectives.

Organizations can also use VAP to assess their training programs. They could do so against the value of training to achieving strategic objectives and the ability to implement the programs. Another possible application is to establish provincial or national objectives and assess provincial- or national scale programs against those objectives—perhaps using a representative group brought together to make assessments.

VAP is intended to be a catalyst to engage education and business in partnerships that foster learning excellence. The ultimate aim is to ensure Canada's success and competitiveness.

We encourage business people, educators and others interested in effective collaborative education activities, to use VAP both as a tool to facilitate objective setting and program assessment, and as a framework for dialogue and discovery. It is designed to help build a common language, define shared objectives, and implement effective programs.

Education–Business Partnership Toolkit

The Value Assessment Process is part of a Partnerships Toolkit developed by The Conference Board of Canada. These tools can be found at www.conferenceboard.ca/topics/education/ebp/default.aspx.

For Post-Secondary Education (PSE)–Business Partnerships:

- Ethical Guidelines for PSE–Business Partnerships
- Operating Principles for PSE–Business Partnerships
- Value Assessment Process

For K-12 Education–Business Partnerships:

- Ethical Guidelines for Education–Business Partnerships
- Operating Principles for Education–Business Partnerships
- Value Assessment Process

Appendices

What's Inside

Appendix 1 Partnership Program Summary Template (Blank)
Appendix 2 Partnership Program Summary Template (Completed Example)

Appendix 1

Partnership Program Summary Template (Blank)

To be completed by both EPs and BPs Together.

By going through the process of completing this summary document, you will gain a greater understanding of the partnership program. You and your partners can use this template to build a partnership program summary. To help you, there is an example of a completed template below this blank template.

Partnership Program Information
Title:
Location:
Partners:
Age of Partnership:
Number of sites:
Other Information:

Partnership Program Overview
(Describe the partnership's development, organization, administration, and the motivations and interests of each partner.)

Groups Served
(What, principal groups are you targeting in the objectives?)

Partnership Program Information (cont'd.)

Partnership Objectives

Education Objectives
(Try to list four or five.)

Business Objectives
(Try to list four or five.)

Resources Committed

Human Resources
(number of people, time commitment, equivalent dollar value, by partner)

Facilities/Equipment Resources
(number and type, equivalent dollar value, by partner)

Financial Resources Committed
(dollar amounts, by partner)

Financial Resources Committed

Partnership Programs

Programs and Activities
(title or type)

Partnership Program Information (cont'd.)

Partnership Programs (cont'd.)

Program Inputs (process information, including number of participants delivering or receiving programs in specified time periods)	**Program Outcomes:** (quantitative measures, qualitative descriptions: e.g., graduation rates, changes in students' and employees' skills and attitudes, comparisons with previous outcomes or current outcomes of non-participants)

Evaluation

Evaluation Inputs (techniques, tools, instruments and forms used to gather information and summarize observations or impressions; specify by program)	**Evaluation Outcomes** (techniques, tools, instruments and forms used to gather information and summarize observations or impressions; specify by program)

Appendix 2

Partnership Program Summary Template (Completed Example)

Partnership Program Information
Title: Social Innovation Start-ups/PSE partnership
Location: Northern Saskatchewan, Canada
Partners: Education—one PSE institution; Business—five local start-up companies
Age of Partnership: Two years
Number of sites: Six (PSE institution and numerous start-up locations)
Other Information:

Partnership Program Overview
(Describe the partnership's development, organization, administration, and the motivations
and interests of each partner.)

This partnership, between five local start-ups and a PSE institution, is located in a northern Saskatchewan community. More than 12 owners/employees from five start-ups, 5 faculty from two departments (business and humanities), and at least 30 business and humanities students are involved each year. The partnership coordinators meet twice a year to discuss their programs and prepare an annual plan of activities.

Programs have developed gradually, as participants, needs, and resources have allowed. The multi-program approach was intentional—partners felt that no single program, however successful, would achieve the objective. Instead, they felt that a variety of programs were needed to:

- Provide students with exposure to a wide range of social enterprises, innovation and entrepreneurial activities, and the start-up community beyond the curriculum;
- Convey the message that entrepreneurial culture, innovation skills, and the commercialization of social innovations are valuable to the local community and beyond;
- Improve faculties' connection to the entrepreneurial capabilities, expertise, and experience found within the community;
- Help local start-ups address current business challenges and achieve commercial success; and
- Consider the value of the partnership's programs to employee recruitment and development.

Groups Served
(What, principal groups are you targeting in the objectives?)

- PSE students (from business and humanities programs)
- PSE faculty (from business and humanities)
- Start-up owners
- Start-up employees

Partnership Program Information (cont'd.)

Partnership Objectives

Education Objectives
(Try to list four or five.)

- Improve career preparation of students
- Provide students with real-world experiences and applied research opportunities
- Make classroom instruction more effective by leveraging experiential learning activities
- Enhance personal development and motivation of all participants.

Business Objectives
(Try to list four or five.)

- Leverage the skills, talent and knowledge of PSE faculty and students
- Enhance employee development
- Update faculties' familiarity with the start-up community found outside the PSE institution
- Increase recruitment of qualified, local, post-secondary graduates
- Spark interest in entrepreneurship and social innovations
- Earn goodwill.

Resources Committed

Human Resources
(number of people, time commitment, equivalent dollar value, by partner)

- 12 start-up owners/employees, volunteer and paid company time (typically 1 day a week + occasional evenings for special events and entrepreneur-related activities)
- 5 PSE faculty (business and humanities) + administration staff
- 30 students (business and humanities)

Facilities/Equipment Resources
(number and type, equivalent dollar value, by partner)

- Surplus laptops and technology, provided by start-up companies
- Use of facilities and equipment at start-up sites
- Use of PSE institution's technology, machinery and equipment, classrooms + open space and meeting facilities

Financial Resources Committed
(dollar amounts, by partner)

- $15,000 annually from the 5 start-up companies
- $5,000 annually from the PSE institution

Financial Resources Committed

- Business and education connections + networks
- Access to venture capitalists and other potential funders
- Transit services

Partnership Programs

Programs and Activities
(title or type)

- Experiential learning activities for students and faculty
- Applied research activities (use of machinery and equipment and technology) + faculty expertise and knowledge
- Mentoring and job-shadowing activities
- Independent study projects
- "Dragons Den" evening for students to sell their social enterprise ideas
- Financing start-ups and risk mitigation talks with community entrepreneurs and venture capitalists/angel investors/ financial institutions

Partnership Program Information (cont'd.)

Partnership Programs (cont'd.)

Program Inputs
(process information, including number of participants delivering or receiving programs in specified time periods)

- 5 faculty annually engage with start-up community leaders and entrepreneurs to learn about business opportunities and challenges, social innovations, and skills needs
- 30 students each year take part in a range of applied and practical entrepreneurial learning activities and experiential learning opportunities (both in the classroom—e.g., business leader presentations; and real-world business environments—e.g., applied research, design, community engagement, co-op placements...)
- Entrepreneurs, owner/operators and employees engage with students and faculty on business/start-up issues.

Program Outcomes:
(quantitative measures, qualitative descriptions: e.g., graduation rates, changes in students' and employees' skills and attitudes, comparisons with previous outcomes or current outcomes of non-participants)

- Continual faculty and entrepreneurial professional development
- Increased career preparedness and skills development of students
- Enhanced awareness of value of social innovations, new business opportunities, among students, faculty and community
- Increased acceptance of entrepreneurship and innovation as a career path
- Increased enrolment in PSE business and humanities programs
- Enhanced morale among community entrepreneurs, owner/operators, employees
- Improved business and commercialization success

Evaluation

Evaluation Inputs
(techniques, tools, instruments and forms used to gather information and summarize observations or impressions; specify by program)

- conduct online questionnaires and face-to-face interviews with students, faculty, entrepreneurs, owner/operators, community leaders
- keep learning outcomes data
- track student, faculty and entrepreneur participation and engagement rates

Evaluation Outcomes
(techniques, tools, instruments and forms used to gather information and summarize observations or impressions; specify by program)

- conduct questionnaires and interviews
- observe and summarize observations
- compile anecdotal observations of changes in student/faculty attitudes toward social innovation, entrepreneurship, new business opportunities and commercialization of products and services.
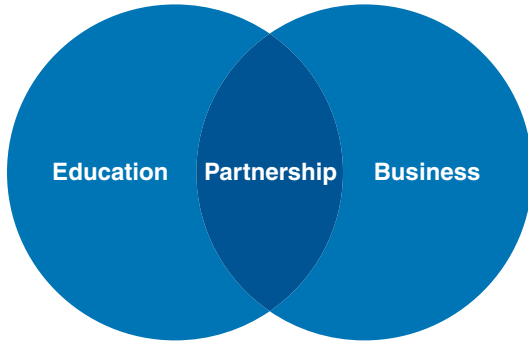
Value Assessment Process

Value Assessment Process is a tool to help education and business partners set objectives and evaluate partnerships. It outlines a process for assessing value that guides partners in making informed decisions.

Copies of the VAP Workbook are available for free download at: www.conferenceboard.ca/topics/education/ebp/default.aspx.

How Does This Process Fit with Organizations' Methods for Assessing Value?

The Value Assessment Process serves to complement existing methods of evaluation and value assessment. Partners can use all or part of the process, and can make adjustments to suit their own needs.

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Education **Partnership** **Business**

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