Focusing on What Matters: Engaging Stakeholders in Developing Evaluation Questions

A Conversation with:

Hallie Preskill, PhD, Executive Director, FSG Strategic Learning and Evaluation Center
Laura Leviton, PhD, Senior Adviser for Evaluation, The Robert Wood Johnson Foundation
Robin Lin Miller, PhD, Professor, Michigan State University
Dennis Scanlon, PhD, Professor, Penn State University
David Chavis, PhD, CEO and Principal Associate, Community Science

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Today’s Agenda

Welcome

*Hallie Preskill, FSG*

Introduction to *A Practical Guide for Engaging Stakeholders in Developing Evaluation Questions*

*Laura C. Leviton, The Robert Wood Johnson Foundation*

Overview of Stakeholder Engagement and the Five-Step Process (:10)

*Hallie Preskill, FSG*

The Michigan Young Men’s Health Needs Assessment (:10)

*Robin Lin Miller, Michigan State University*

Center for Health Care Strategies Regional Quality Improvement Initiative (:10)

*Dennis P. Scanlon, The Pennsylvania State University*

Stakeholder Engagement in the Evaluation of Community Change Initiatives (:10)

*David M. Chavis, Community Science*

Audience Questions & Answers (:15)
Laura Leviton, PhD
Senior Adviser for Evaluation
The Robert Wood Johnson Foundation
The Evaluation Process

1. Articulate Theory of Change & Develop Program Logic Model
2. Focus the Evaluation
3. Determine Design and Data Collection Methods
4. Collect Data
5. Analyze Data and Interpret Findings
6. Develop Recommendations and Action Plans

Engaging Stakeholders in Developing Evaluation Questions

Refine Strategy Based on Evaluation Findings
Types of Stakeholders

- Program staff
- Students
- Clients/customers
- Program designers
- Funders
- Parents
- Program delivery staff
- Managers
- Executives
- Administrators

- Donors
- Community leaders
- Elders
- Community members
- Constituents
- Policy makers
- Teachers/educators
- Legislators
- Policy makers
- Researchers

_Evaluation stakeholders are those who have a vested interest in the program being evaluated, and thus would be in a position to use the evaluation results in some way._
Involving Stakeholders in an Evaluation:

- Increases quality, scope, and depth of questions
- Ensures transparency
- Facilitates the evaluation process
- Acknowledges political context of evaluation
- Builds evaluation capacity
- Fosters relationships and collaboration
Stakeholder Contributions to Developing Evaluation Questions

Good evaluation questions generate useful, relevant and credible evaluation findings assuming appropriate evaluation design, data collection and analysis procedures.
Five Step Process for Engaging Stakeholders in Developing Questions

- **Step 1:** Prepare for stakeholder engagement
- **Step 2:** Identify potential stakeholders
- **Step 3:** Prioritize the list of stakeholders
- **Step 4:** Consider potential stakeholders’ motivations for participating
- **Step 5:** Select a stakeholder engagement strategy
# Stakeholder Engagement Strategies and Considerations

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<tr>
<th>Strategies</th>
<th>Group Meetings</th>
<th>One-on-One Meetings</th>
<th>Surveys</th>
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**Strategy is:**
- ![Green](#): Well-suited
- ![Yellow](#): Sometimes well-suited
- ![Red](#): Not well-suited
Stakeholder Engagement Techniques

- Logic Modeling
- Mind Mapping
- Appreciative Inquiry
- Role Playing
- Brainstorming / NGT
- One-on-One Interviews (in-person / phone / email)
- Focus Group Interviews
- Discussion of Article / Presentation
- One-Time Survey (online)
- Delphi Technique
- Moderated Discussion (online / video / phone)

In-Person

Either

Virtual

- Group Meeting
- One-on-One Meeting
- Survey
The Michigan Young Men’s Health Needs Assessment

Robin Lin Miller, PhD
Professor, Michigan State University
Needs Assessment Background

- Commissioned by Michigan Department of Community Health and Michigan’s HIV/AIDS Planning Council
- Purpose to establish priorities for types of prevention and care programming
- Focus on highest risk population in state: 13-24 year old black gay and bisexual men
- Community participation required
Focusing the Questions
“*It’s about us, not about them.*”

- Interviewed 21 diverse (geography, affiliation, role) adult stakeholders on informational needs and uses of data
- Reviewed national literature
- Presented adult stakeholder interests and overview of existing literature to team of young men co-evaluators
- Co-evaluators determined information gathering priorities and focus
RQ1 Logic Model

Lead Agency

Establish a multi-stakeholder partnership

Develop RQ1 Vision and plans for Quality Strategies

Monitor implementation of Quality Strategies and their impact on delivery system

Make decisions regarding continuation of partnership and/or modifications to Quality Strategies

Quality Strategies

- Evidenced-Based Practices and Measures
- Continuous Quality Improvement
- Financial Incentives
- Innovations in Health Information Technology
- Comprehensive Care Management
- Consumer Engagement

CHCS
Technical Assistance

Performance Measurement

Chronic Care Delivery System

Delivery System Infrastructure

Patient Care Process

Patients

Collaboration

Practitioners

Self-Management

Evidence-Based Care

Patient Outcomes

Rev: 11-3-06
Rochester RQI Logic Model

Evaluation Level

RQI Partnership
Quality Improvement Strategies
Financial Incentives (Pay for Participation)
Continuous Quality Improvement
Evidence-Based Practices and Measures & Health Information Technology
Chronic Care Delivery System

Financial incentives
- DPRP fees
- Honorarium

DPRP Audit

Consulting Services
Primary Care Physicians
Select Patient Registry Vendor
All Payer Patient Registry

Improvements in Care Processes
Improvements in diabetes performance measures

Assess DPRP Participation & Outcomes
Assess Changes in Diabetes Measures

Revised 4-07

Start 6 Months 1 Year 18 Months 2 Years
RQI Logic Models

- Work with funder before approaching stakeholders to motivate purpose, importance, and participation requirements
- Don't just "take" but try to "give" - tangible benefit to the external stakeholders that the evaluation can provide either once or at multiple points
- Logic modeling requires an interactive back and forth process -- build it into the evaluation planning process
- A solid understanding and agreement on the logic model up front benefits everyone
- Respect the time of external stakeholders -- don't bog them down in unnecessary details
Stakeholder Engagement in the Evaluation of Community Change Initiatives

David M. Chavis, PhD
Principal Associate and CEO, Community Science
What is important?

- Building Trust— It’s all about relationships
- Addressing power dynamics and differences
- Understanding the stage of initiative development
- History and past experience
- Being ready and capable for the evaluation
- Learning and usefulness
- Getting on the same page
Needs Assessment Background

• Stage 1: Learning through past experience with evaluation, intergroup relations, power and expectation, stage, capacity, potential use, role of evaluator/evaluation. How much input is “required”? Listen a lot. Be clear on your position or role.

• Stage 2 -3: Who are the clients and consumers? Whose voice is needed? Who needs buy in? How can we ensure important voices are heard? What can we afford to do and can’t afford not to do? Pay now or pay later.

• Stage 4: Where are the conflicts and tensions? How do you prepare to address them?

• Stage 5: What can you afford to do in the time you have? How to bring stakeholders together? What will put them on the same page in terms of purpose, outcomes, and implementation process? How can we help them learn, be useful, and be more capable to take on this initiative?
Audience Questions

Hallie Preskill, FSG

Laura C. Leviton
Robin Lin Miller
Dennis P. Scanlon
David M. Chavis
Thank you

• Thank you for joining in the stakeholder engagement conversation today

• Please fill in the brief electronic survey that you’ll receive after today’s event to share your feedback with us

• For more information on stakeholder engagement in strategic learning and evaluation, visit www.fsg.org and click on Strategic Learning and Evaluation or contact us at info@fsg.org

Today’s webinar presented in cooperation with the
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