



Social Impact Consultants

Discovering better ways
to solve social problems

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

June 2011

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)

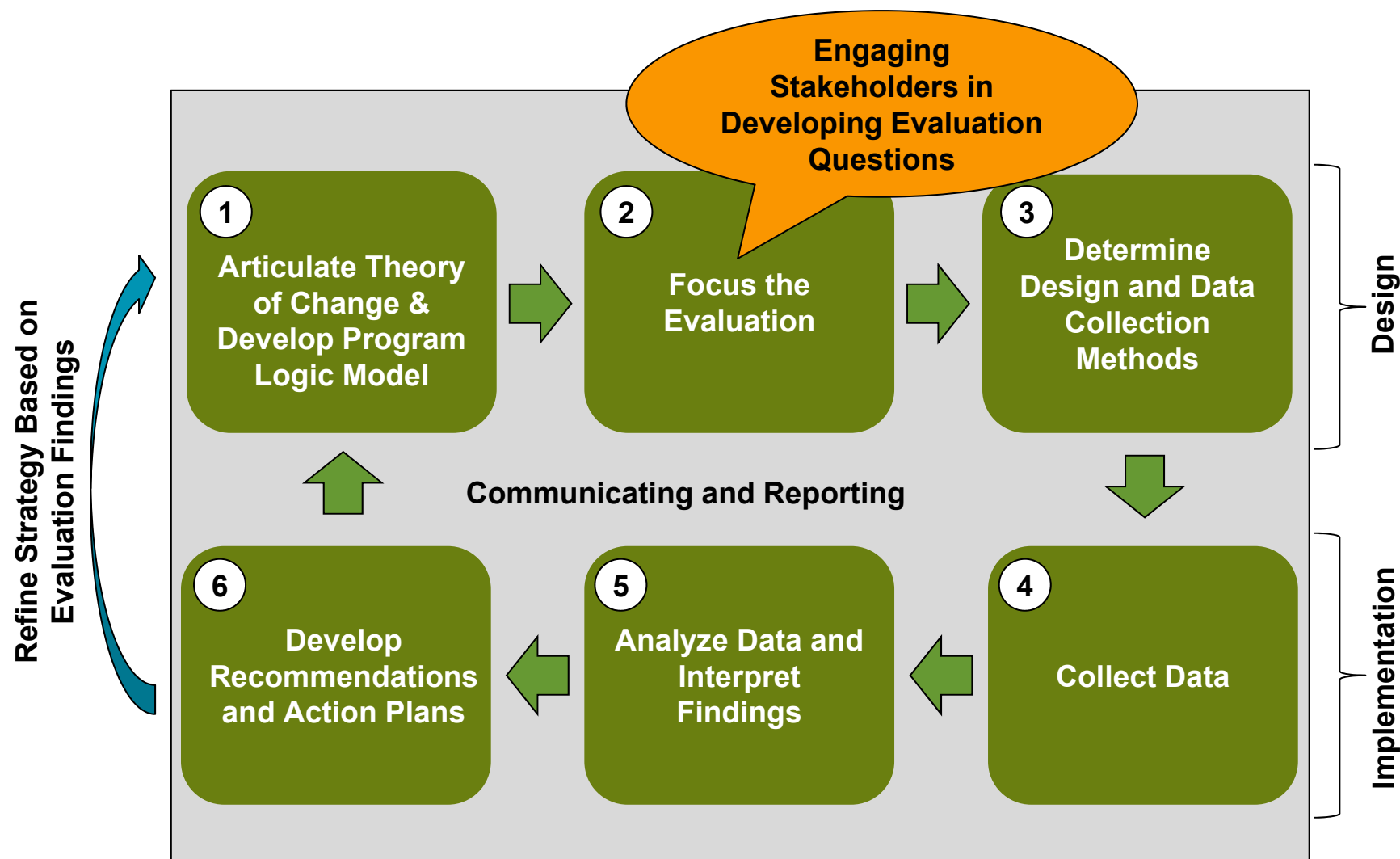
David M. Chavis, Community Science

Audience Questions & Answers (:15)



Laura Leviton, PhD
Senior Adviser for Evaluation
The Robert Wood Johnson Foundation

The Evaluation Process



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

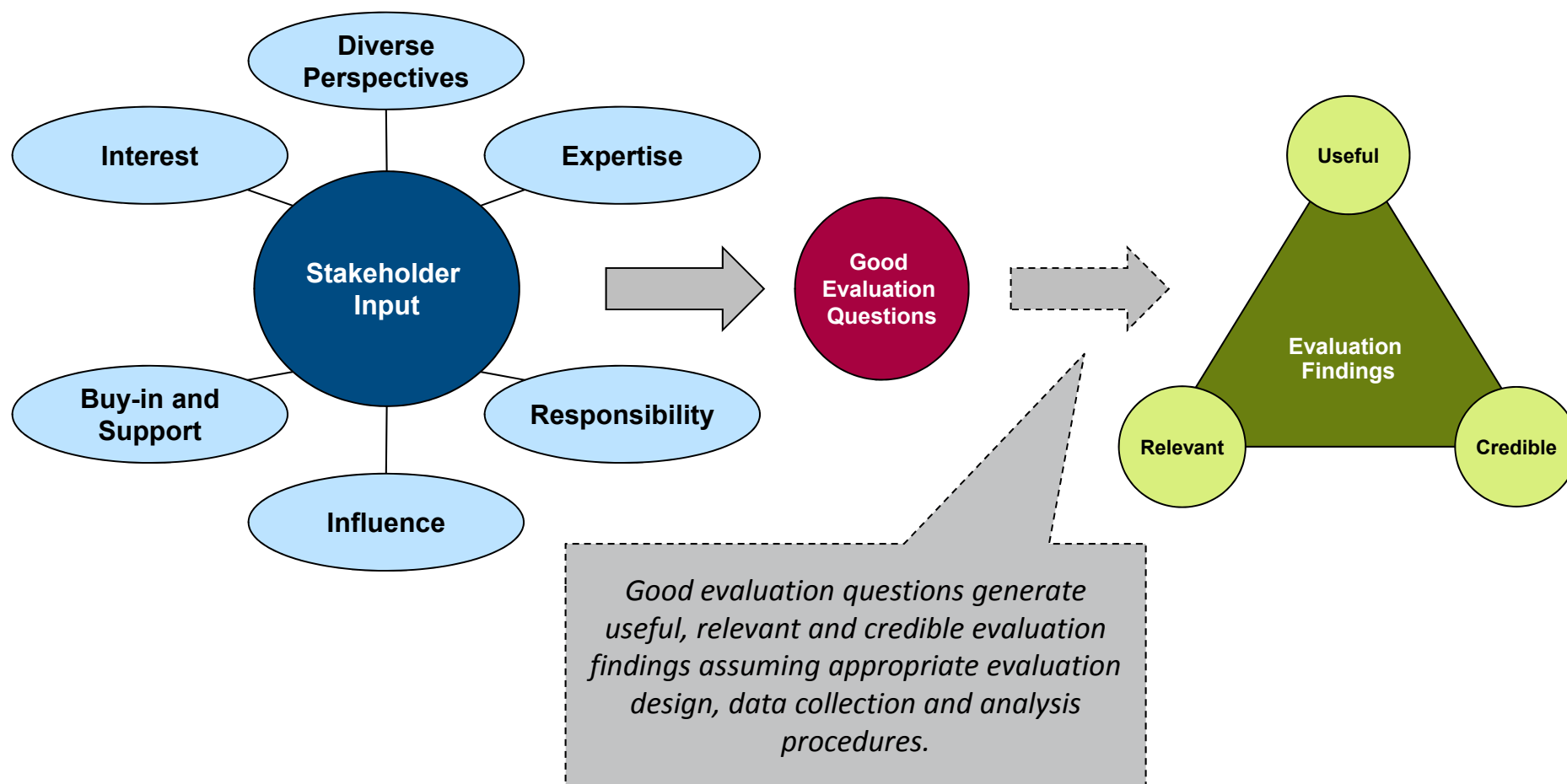
Evaluation stakeholders are those who have a vested interest in the program being evaluated, and thus would be in a position to use the evaluation results in some way

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



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

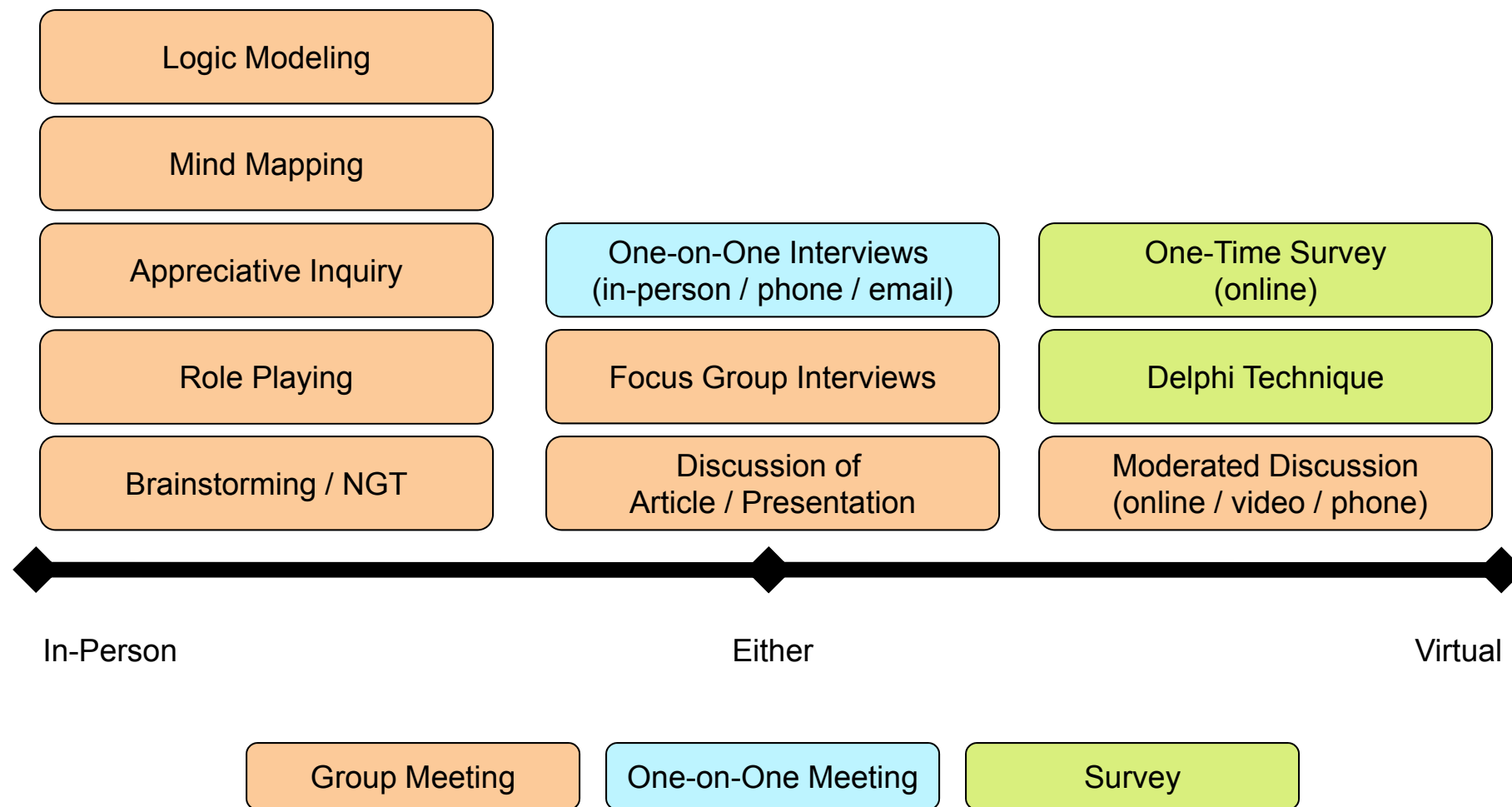
Stakeholder Engagement Strategies and Considerations

Strategies \ Considerations	Group Meetings		One-on-One Meetings		Surveys
	In-Person	Virtual	In-Person	Virtual	N/A
Short Evaluation Timeline					
Limited Budget					
Dispersed Geographies					
Differing Perspectives					
Lack of Existing Relationships					
Limited Stakeholder Availability					
Many Stakeholders					
Little Familiarity with Evaluation					
Complex Program / Initiative					

Strategy is:

-  Well-suited
-  Sometimes well-suited
-  Not well-suited

Stakeholder Engagement Techniques





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.”

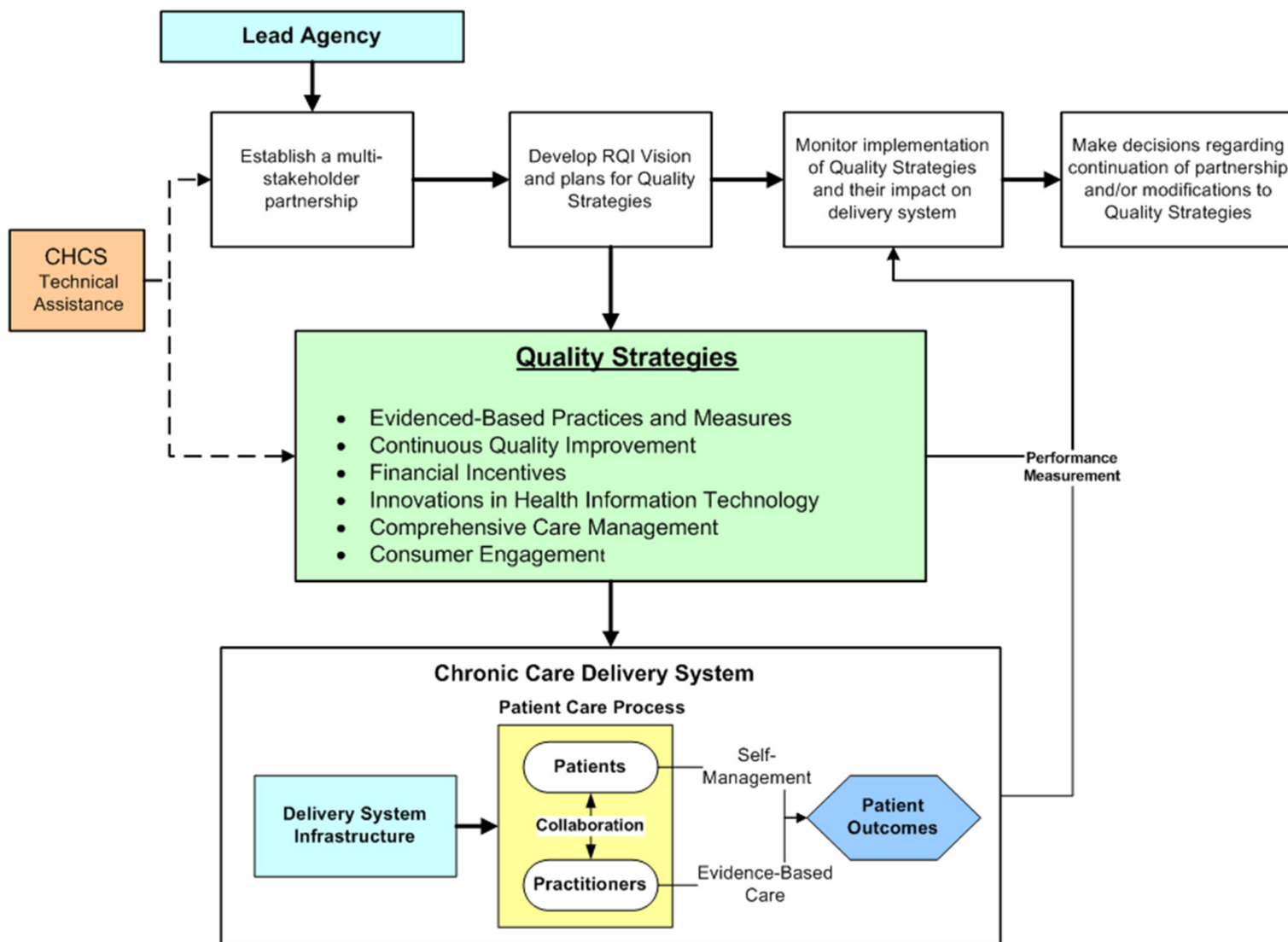
- Interviewed 21 diverse (geography, affiliation, role) adult stakeholders on informational needs and uses of data
- Reviewed national literature
- Presented adult stakeholder interests and overview of existing literature to team of young men co-evaluators
- Co-evaluators determined information gathering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



Center for Health Care Strategies Regional Quality Improvement Initiative

**Dennis P. Scanlon, PhD
Professor of Health Policy and Administration
The Pennsylvania State University**

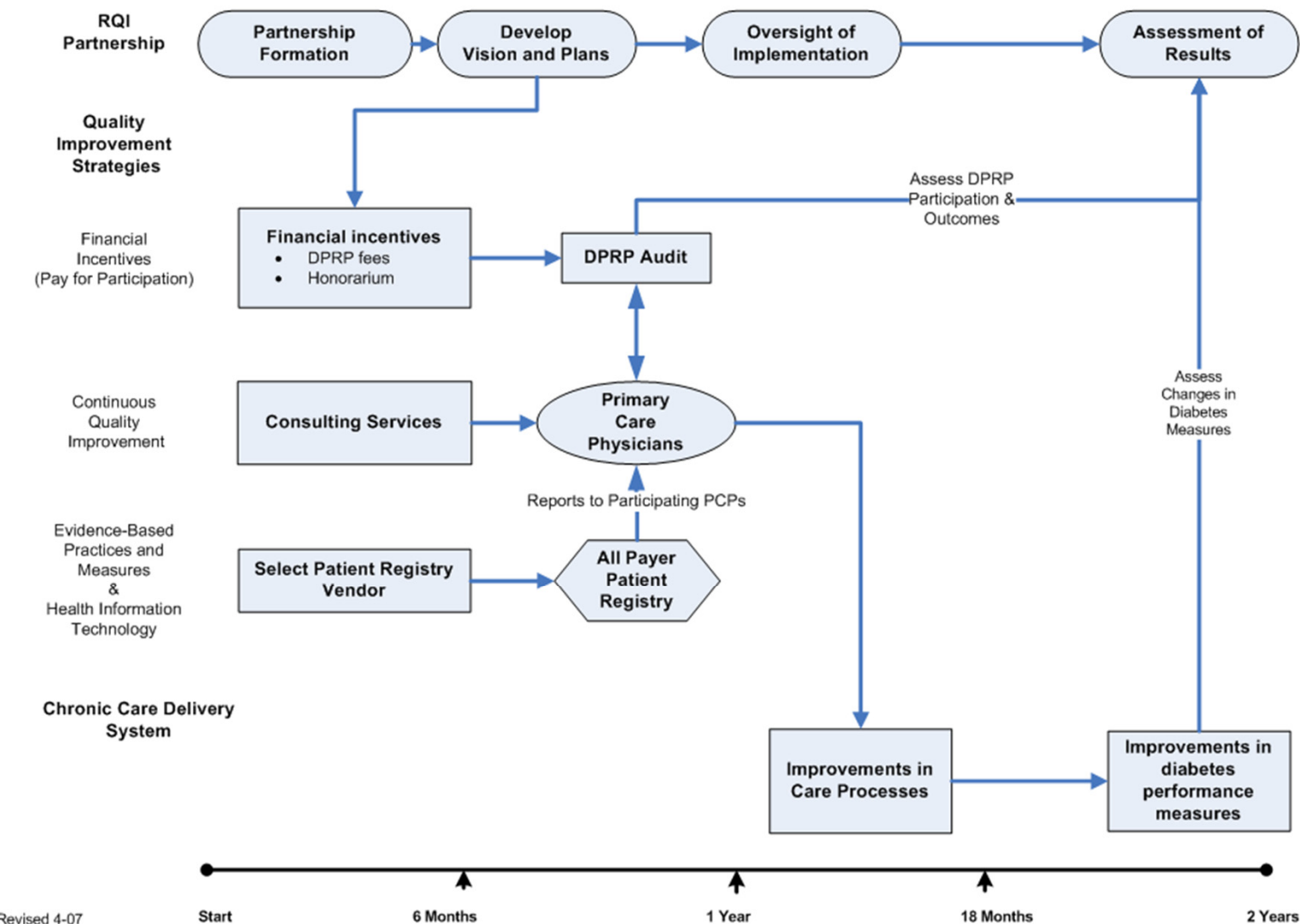
RQI Logic Model



Rev: 11-3-06

Rochester RQI Logic Model

Evaluation Level



Revised 4-07

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
Robert Wood Johnson Foundation
www.rwjf.org