

ROBERT WOOD JOHNSON FOUNDATION EVALUATION SERIES

# A Practical Guide for Engaging Stakeholders in Developing Evaluation Questions

2009

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This report was prepared for the Robert Wood Johnson Foundation, under the direction of Laura C. Leviton, Ph.D., Special Adviser for Evaluation, by Hallie Preskill, Ph.D., and Nathalie Jones. Hallie Preskill, Ph.D. ([hallie.preskill@fsg-impact.org](mailto:hallie.preskill@fsg-impact.org)) is Executive Director of FSG's Strategic Learning and Evaluation Center. Nathalie Jones ([nathalie.jones@fsg-impact.org](mailto:nathalie.jones@fsg-impact.org)) is an Associate at FSG.



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*This guide aims to assist evaluators and their clients in the process of engaging stakeholders—those with a stake or interest in the program, policy, or initiative being evaluated. The guide should assist philanthropy, but also the field of evaluation more generally, as it seeks to increase the value and usefulness of evaluation.*

Evaluation is all about asking and answering questions that matter—about programs, processes, products, policies and initiatives. When evaluation works well, it provides information to a wide range of audiences that can be used to make better decisions, develop greater appreciation and understanding, and gain insights for action. When designed and implemented with care and thought about what we need to know and why, evaluation can be an important strategic tool for measuring the extent to which, and the ways in which, a program or initiative’s goals are being met, and how the program or initiative might be contributing to the organization’s mission. The findings of a carefully planned evaluation can then be used to refine the program’s strategy, design and/or implementation, as well as to inform others about the lessons learned, progress and impact of the program.

One way to ensure the relevance and usefulness of an evaluation is to develop a set of evaluation questions that reflect the perspectives, experiences and insights of as many relevant individuals, groups, organizations, and communities as possible. As potential users of the evaluation findings, their input is essential to establishing the focus and direction of the evaluation. By soliciting the opinions, interests, concerns and priorities of stakeholders early in the evaluation process, the results are more likely to address stakeholders’ specific information needs and be useful for a range of purposes, among them to improve program effectiveness, to affect policy decisions and/or to instigate behavioral change. Engaging a wide range of stakeholders in the question development process also provides opportunities to question assumptions, explore competing explanations, and develop consensus around what it is the evaluation should address. Taking differing views into account creates an evaluation process and eventual set of findings that will be regarded as credible. Finally, recommendations that result from an evaluation in which stakeholders have been involved are more likely to be accepted by a broader constituency and implemented more fully and with less resistance.

The Robert Wood Johnson Foundation (RWJF) is a long-time proponent of evaluation as a means to inquire systematically into the effects and impacts of its grantmaking programs. As the Foundation has reflected on its past evaluation work, it has increasingly come to value a more deliberate and thoughtful process for engaging stakeholders in various aspects of an evaluation’s design. Stakeholders might include internal staff who have decision-making responsibility for the program, such as program managers and officers, but should also include external stakeholders such as policy-makers, researchers, community members,

health care providers, professional organizations, and others who have interest, experience and expertise in the program or initiative being evaluated. RWJF has commissioned this guide to help program officers, grant recipients, evaluators, researchers, and others interested in evaluation think about and plan for soliciting input from stakeholders about the questions that should be addressed by an evaluation.

It is important to note that while this guide specifically focuses on the role of stakeholders in developing an *evaluation's* key questions, considerations of why and how to engage stakeholders may also be useful to researchers in defining their research questions, as well as to foundation staff when designing a program strategy or developing a grant initiative.

### [Overview of the Guide](#)

This guide describes a *five-step process* for engaging stakeholders in developing evaluation questions, and includes *four worksheets* and *a case example* to further facilitate the planning and implementation of your stakeholder engagement process.

[Step 1: Prepare for stakeholder engagement](#): This step includes collecting information about the program or initiative being evaluated—its history, why it came into being, what it is trying to accomplish and what success would look like.

[Step 2: Identify potential stakeholders](#): This step involves identifying all of the potential stakeholders whom you might engage in the evaluation question development process.

[Step 3: Prioritize the list of stakeholders](#): This step helps determine which stakeholders are most vital to the question development process.

[Step 4: Consider potential stakeholders' motivations for participating](#): This step has you consider stakeholders' motivations for participating in the question development process. Knowing this will help you select an engagement strategy.

[Step 5: Select a stakeholder engagement strategy](#): Based on stakeholders' motivations, your reasons for including them and various other considerations, this step helps you choose one or more engagement strategies to facilitate the identification and development of the evaluation's key questions.

Our hope is that this document provides you with concrete information, tools and practices that will contribute to useful, relevant and credible evaluation findings.

Philanthropy, done well, has the potential to affect the most challenging and persistent social problems facing our world today. Evaluating the impact of philanthropic resources in addressing these problems is crucial to making the adjustments and improvements necessary to maximize the philanthropic sector's contributions to social progress. Fortunately, the field's interest in evaluation's ability to provide useful information for decision-making and action has been growing steadily over the last few years. An active participant in this arena has been the Robert Wood Johnson Foundation (RWJF), a long-time proponent of evaluation as a means for systematically inquiring into the effects and impacts of its grantmaking programs.

As the Foundation has reflected on its past evaluation work, it has increasingly come to value a more deliberate and thoughtful process for engaging stakeholders in various aspects of an evaluation's design. Stakeholders might include internal staff such as program managers and officers, but should also include external stakeholders such as policy-makers, researchers, community members, health care providers, professional organizations and others who have interest, experience and expertise in the program or initiative being evaluated.

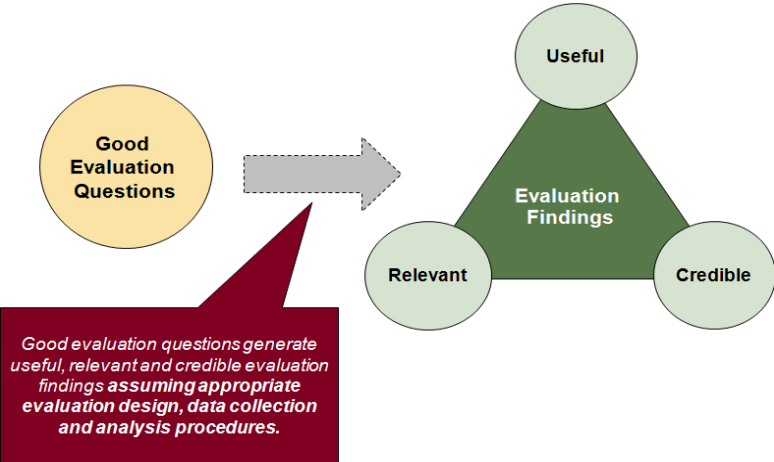
The Foundation's commitment to engaging stakeholders is based on several values and principles. Perhaps most importantly, since RWJF represents a public trust, it is essential that it understands the perceived impact of its work on all of the affected parties. Second, philanthropy can tend to become isolated from stakeholders' diverse viewpoints and experiences, so it becomes important to seek out those perspectives systematically. In addition, because the Foundation seeks social change, it makes sense to seek the input of those with the power and resources to guide such change. And finally, consulting stakeholders generally makes evaluations more relevant, credible and useful; when evaluations provide meaningful results, our grantees and colleagues will be more successful in their work. While external stakeholders' questions and preferences should not drive the resulting evaluation questions, we believe they should certainly inform their development.

RWJF has commissioned this guide to help program officers, grantees, evaluators, researchers, and others interested in evaluation think about and plan for, engaging stakeholders in this phase of an evaluation's design. Ultimately, the Foundation believes that evaluation can play an important role in supporting its own learning and development, as well as enhancing learning for its grantees and the field.

It is important to note that this guide specifically focuses on the role of stakeholders in developing an evaluation's key questions. Considering why and how to engage stakeholders may also be useful to researchers in defining their research questions, as well as to foundation staff when designing a program strategy or developing a grant initiative. Our hope is that this document provides you with concrete information, tools, and practices that will contribute to useful, relevant, and credible evaluation findings.

Evaluations should always be conducted in ways that increase the likelihood that the findings will be used for *learning, decision-making, and taking action*. One way to enhance use is to develop a set of evaluation questions that reflect the perspectives, experiences and insights of as many relevant individuals, groups, organizations and communities as possible. As potential users of the evaluation findings, their input is essential to establishing the focus and direction of the evaluation. When we ask good questions and design an evaluation using rigorous and culturally appropriate methods, instruments and data analysis procedures, then we can anticipate achieving more **useful, relevant and credible evaluation findings** (see Figure 1).

**Figure 1: Relationship Between Evaluation Questions and Findings**



## The Role of Evaluation

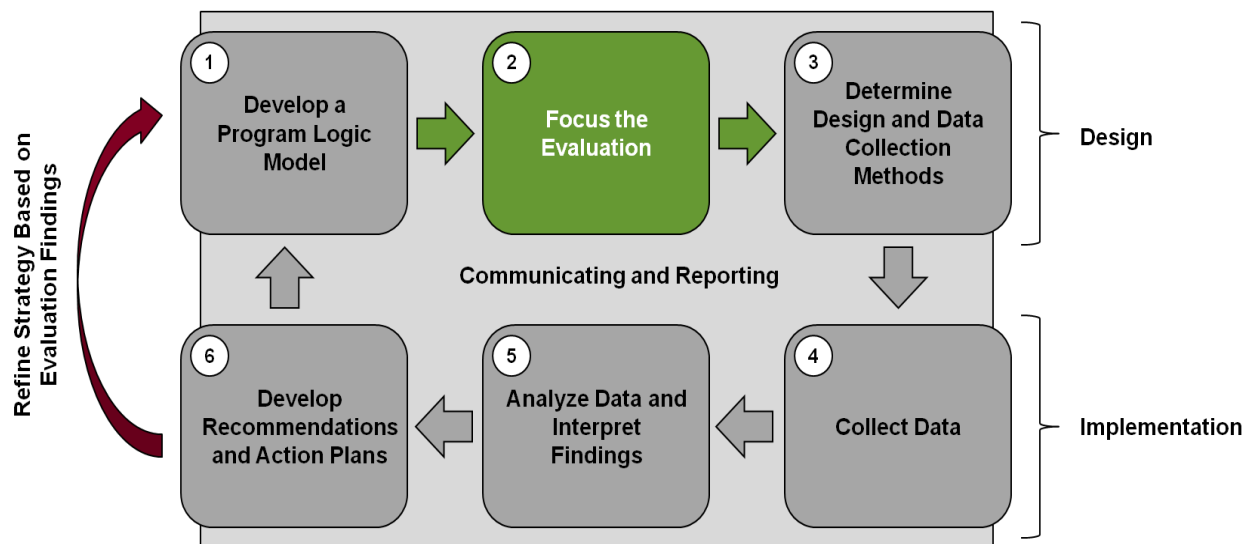
Evaluation is all about asking and answering questions that matter—about programs, processes, products, policies and initiatives. When evaluation works well, it provides information to a wide range of audiences that can be used to make better decisions, develop greater appreciation and understanding and gain insights for action. The question should not be, “Should we evaluate?” but rather, “Can we afford not to evaluate?”

When designed and implemented with care and thought about what we need to know and why, evaluation can be an important strategic tool for measuring the extent to which, and the ways in which, a program or initiative’s goals are being met, and how the program or initiative might be contributing to the organization’s mission. The findings of a carefully planned evaluation can then be used to refine the program’s strategy, design, and/or implementation, as well as to inform others about the lessons learned, progress, and impact of the program.

## The Evaluation Process

Most evaluations follow a common process, as shown in Figure 2 below.

**Figure 2: Phases of Evaluation**



The evaluation process often begins with developing a logic model, which articulates the program or initiative’s theory of change or action (Phase 1). The next phase (Phase 2) is to focus the evaluation, and it is in this phase that the purpose of the evaluation is determined, stakeholders are identified, and key evaluation questions are developed. The following phases include: choosing a design and data collection methods (Phase 3); collecting data (Phase 4);



analyzing and interpreting the data (Phase 5); and developing recommendations and action plans (Phase 6). Throughout an evaluation, efforts to communicate and report on the evaluation processes and findings should be ongoing. Phase 2—focusing the evaluation—is the context for this guide, which highlights ***the role of stakeholders in developing an evaluation’s key questions***. Should you want to learn more about how to design and implement evaluations, a brief list of resources is included in Appendix B at the end of this document.

Yogi Berra is cited as having once said, “If you don't know where you are going, you might wind up someplace else.” Nothing could be truer for evaluation; the questions serve as the road map for the evaluation. Good evaluation questions:

- establish the boundary and scope of an evaluation and communicate to others what the evaluation will and will not address.
- are the broad, overarching questions that the evaluation will seek to answer; they are not survey or interview questions.
- reflect diverse perspectives and experiences.
- are aligned with clearly articulated goals and objectives.
- can be answered through data collection and analysis.

At first blush, developing evaluation questions sounds as if it should be easy. This might be true if the evaluation were to serve only an individual’s own information needs. In reality, every program or initiative involves many actors. If we genuinely care about evaluation results being used to achieve our goals, then we need to understand what others believe is important.

Adding to the fact that it makes good sense to involve stakeholders, doing so also constitutes ethical and professional evaluation practice. The American Evaluation Association’s *Guiding Principles* state, “When planning and reporting evaluations, evaluators should include relevant perspectives and interests of the full range of stakeholders” ([www.eval.org](http://www.eval.org)). In addition, the *Program Evaluation Standards* published by the Joint Committee on Standards for Educational Evaluation (1994), includes a standard that reads, “Persons involved in or affected by the evaluation should be identified, so that their needs can be addressed” (Utility #1).

### *Stakeholders as Intended Users of Evaluation Findings*

The term “stakeholder” within an evaluation context, refers to those who have a vested interest in that which is being evaluated, and thus, would be in a position to use the evaluation results in some way. Depending on their role relative to the program or initiative being evaluated, stakeholders are positioned to use evaluation findings in different ways. For example, some stakeholders have responsibility for the program’s design, implementation, and/or outcomes, and might be in a position to make immediate and tangible use of the results. This *instrumental* use of the findings reflects changes that can be observed.

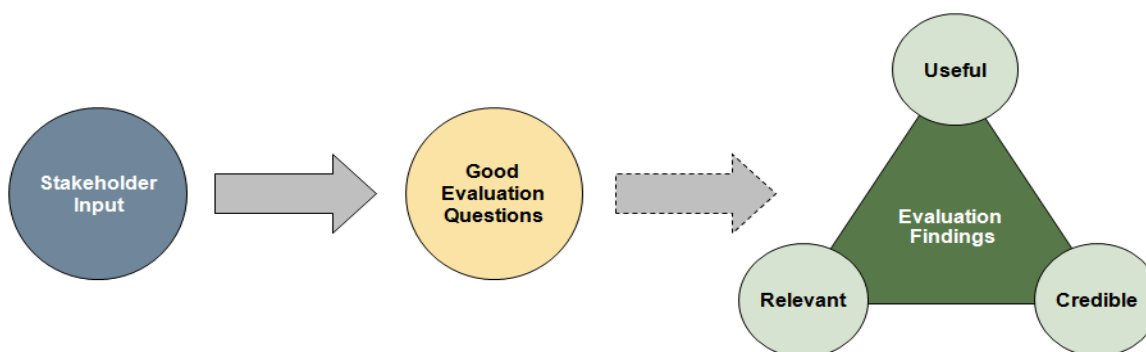
Other stakeholders may develop increased knowledge or understanding based on the evaluation's findings. This *conceptual use* of findings may lead to stakeholders having different kinds of conversations, new insights into future decisions, and/or greater commitment to the program or initiative.

Another group of stakeholders may be those who will make a more *political or symbolic use* of the evaluation findings. Such legitimate uses of the evaluation findings may be applied to advocating the program or initiative, securing new or additional funding, or communicating that the evaluation has taken place.

### Benefits of Engaging Stakeholders

Engaging stakeholders in the question development process yields a variety of benefits. Primary among these is that good questions, when they are thoughtful and well-informed given the range of perspectives that went into developing them, are more likely to yield **findings that are useful, relevant and credible** (see Figure 3).

**Figure 3: Relationship between Stakeholder Input, Evaluation Questions and Findings**



By soliciting the opinions, interests, concerns and priorities of stakeholders early in the evaluation process, the results are more likely to address stakeholders' specific information needs and be **useful** for a range of purposes, among them to improve program effectiveness, to affect policy decisions, and/or to instigate behavioral change. By including stakeholders from diverse backgrounds—cultural, racial, ethnic, geographic, political, organizational and linguistic—you can better determine if the evaluation questions are **relevant** and meaningful to the various stakeholders. Engaging a wide range of stakeholders in the question development process also provides opportunities to question assumptions, explore competing explanations, and develop consensus around what the evaluation should address. Taking a wide range of differing views into account creates an evaluation process and eventual findings that will be regarded as **credible**. Finally, recommendations that result from an evaluation process in which stakeholders have been involved are more likely to be accepted by a broader constituency and implemented more fully and with less resistance.

Several additional benefits of engaging stakeholders in the question development process

serve to support and reinforce the relationship between stakeholder involvement and resulting findings that are useful, relevant and credible.

### ***Increases quality, scope and depth of questions***

Involving stakeholders in the question development process illuminates perspectives that you may not be able to see on your own; it is impossible to know every view point or experience on a given issue or program area. Stakeholders hold valuable knowledge based on their own interests and experiences and can help identify any gaps or inconsistencies in your thinking. By discovering what stakeholders already know about the program or issue being evaluated, you can better ensure that your evaluation is not asking questions for which the answers are already known.

### ***Ensures transparency***

To establish credibility of evaluation findings, the evaluation process from which they emerged should be seen as honest and transparent. In addition to laying the groundwork for credible findings, including a broad range of perspectives communicates openness to others' ideas and experiences and provides stakeholders with an opportunity to raise objections or issues early in the evaluation process. You can then decide how to respond to these concerns and avoid the potential mid-course adjustments that could be required further down the road. Developing evaluation questions with stakeholders establishes a forum for honest communication increases the transparency of the process and provides an opportunity for stakeholders to voice and clarify any misconceptions they—or you—may have.

### ***Facilitates the evaluation process***

Involving a range of stakeholder perspectives ensures that the evaluation questions have been thoroughly vetted and thoughtfully crafted and that they are the right questions to be asking. High-quality, well-informed questions ground the evaluation in a way that facilitates subsequent phases of the evaluation. The relationships that are developed through the question development process may increase levels of trust, and therefore access, when it comes to data collection. Bringing stakeholders into the question development process also raises awareness of the evaluation itself and may contribute to building an audience for the eventual findings. With heightened awareness and expectations among stakeholders, the findings are more likely to be broadly used in a variety of ways.

### ***Acknowledges political context of evaluation***

All programs and initiatives are the result of political decisions—a belief that resources should be allocated to solving a particular problem, or seizing a unique opportunity. As such, it is important to understand that evaluation is inherently political. Involving stakeholders in the question development process communicates a commitment to being inclusive (vs. exclusive), outward looking (vs. inward looking) and expansive (vs. insular). Stakeholders not only help navigate the political waters more effectively, but also serve to position the evaluation so that findings are perceived to be useful, relevant and credible and are more likely to be used as a result.

### ***Building evaluation capacity***

Engaging stakeholders in developing the evaluation questions is an opportunity for them to learn more about evaluation. When they come together to deliberate on what the evaluation should address, they are learning strategic evaluative thinking and practice and what it means to design a professional evaluation. And, when the evaluation process is facilitated in ways that support dialogue, reflection, identifying and challenging assumptions, asking questions and providing feedback, stakeholders' learning about evaluation is enhanced. Furthermore, stakeholders develop a deeper understanding of how to design and implement evaluations that provide useful, relevant and credible findings.

### ***Fostering relationships and collaboration***

When stakeholders have opportunities to meet one another as part of the question development process, they are able to share their interests, experiences and program and content knowledge. As a result, stronger networks of those working on similar social programs/goals are enhanced. These connections may be important for the evaluation's implementation, for future initiatives, and/or for future research, as participants find synergies and possible collaboration opportunities.

Now that you have a good understanding about the value of stakeholders in developing an evaluation's key questions, it is time to focus on the nuts and bolts of how to identify and engage stakeholders in this process. The following sections provide a step-by-step guide and a set of worksheets for engaging stakeholders in developing evaluation questions. Our hope is that these tools will help you consider whom to engage and why and how to engage them in this phase of an evaluation's design.

The following section describes a **five-step process** for engaging stakeholders in developing evaluation questions. This guide also provides **four worksheets** to further facilitate the planning and implementation of your stakeholder engagement process. In the left hand column, each of the steps is described along with a set of tips for implementation. The right side contains information about the worksheet relevant to the step being described, as well as quotes from a variety of practitioners with long-standing commitments to involving stakeholders in their evaluation work. These quotes were obtained from hour-long phone interviews and provide additional insights into why, how and when to involve stakeholders. This set of interviews serves as a complement to FSG's body of knowledge and experience from working in the philanthropic sector over the past 10 years. A list of interviewees can be found in Appendix C at the end of this document.

### *Step 1: Prepare for stakeholder engagement*

*Knowing the background of the program or initiative being evaluated.*

In order to effectively engage the most relevant stakeholders, it is important to have a clear understanding of what is being evaluated.

This might involve knowing:

- when the program or initiative started and who sponsored its development.
- the underlying assumptions about why the program or initiative exists.
- the resources allocated to the program or initiative.
- the activities the program or initiative undertakes to achieve its goals.
- the expected outputs and short- and long-term goals or outcomes of the program or initiative.
- the external forces that have affected or currently influence the program's design and implementation.

A thorough understanding of the program will help ensure that the evaluation involves a wide range of stakeholder perspectives and experiences and that you know whom to engage and why.

*Building relationships.* When it comes to identifying relevant stakeholders, it often begins with whom you know. Spending time to

*“Spend time dissecting the issue. That informs who your stakeholders are and how you engage them.”*

build strong, ongoing relationships with a wide variety of individuals and groups is an excellent investment of time and energy. The larger the network of contacts you have, the more options you will have for including a diverse set of viewpoints and experiences in the evaluation. And the more perspectives you consider, the more robust and inclusive are your resulting questions.

**Tips:**

- ☑ Look for information about the program or initiative in grant documents, board reports, research articles, and specific program documents (e.g., the program logic model or theory of change). If such documents do not exist, talk with two or three individuals who have responsibility for, experience with, or historical knowledge of the program or initiative.
- ☑ Keep track of whom you know and their affiliations in some systematic way. A file or database of your contacts will be an invaluable resource as you look to leverage your relationships to engage the people you know—and the people they know—in your question development process.
- ☑ Develop your breadth of contacts through a membership network or list of individuals interested in the program, initiative and/or issue on which you work.
- ☑ Note important individual, group, or organization characteristics, such as areas of expertise, geographic location and professional affiliations within your network when possible. This information will help you determine if your stakeholders represent target groups, particular experiences, perspectives and/or backgrounds.

[Step 2: Identify potential stakeholders](#)

*Considering your needs.* This is where you begin to assess whom you want “at the table” in the question development process. Since stakeholders offer different kinds of value, your reasons for inviting certain individuals or groups to participate may include the following:

- They have deep **expertise** in the area being studied and can raise questions grounded in extensive research and practice:
  - Who has content knowledge relative to the program or initiative?
  - Who knows of other similar programs?
  - Who is well-respected for his/her knowledge/understanding about this program or initiative?

*“You should develop long-standing relationships. You don’t get very far by selling out. You’ve got to maintain those relationships over many years; most of the people are careerists in their field.”*

*Go to **Planning Worksheet #1** to begin identifying your evaluation’s stakeholders.*

*“For a broadly defined program, you have to involve stakeholders at all levels: those who deliver care, those who receive care, policy-makers at a regional, state and federal level.”*

- Who has evaluated a similar program?
- They represent **diverse perspectives and/or experiences** and can raise questions and ideas that reflect all sides of the issue:
  - Who has needs or perspectives most different from you or those in your organization?
  - Whose voices need to be heard? Whose voices are underrepresented or are missing?
  - Who are the beneficiaries or clients of the program or initiative?
  - Who are the critics of the program or initiative?
- They are **responsible** for the program or initiative being evaluated and can use the evaluation findings to make improvements:
  - Who manages the program or initiative?
  - Who provides funding for the program or initiative?
  - Are there additional individuals with responsibility for the implementation and/or operations of the program or initiative?
- They are in a position of **influence** and can raise questions relevant to politicians and other change agents:
  - Whom do people look to for information on this kind of program or initiative?
  - Who are the power brokers within this community or organization?
  - Who are the policy-makers working on this issue?
- They are intensely **interested** in the issue and want to help the program or initiative reach its goals; they raise questions about possibilities and images of future success:
  - Who are advocates of this program or initiative?
  - Who has been working on this issue (from a research or practice perspective) and has creative ideas for the future?
  - Who would bring a creative energy to the process?
- They are proponents of evaluation and build **buy-in and support** throughout the evaluation's design and implementation:
  - Who can spread positive messages about the value of the evaluation?

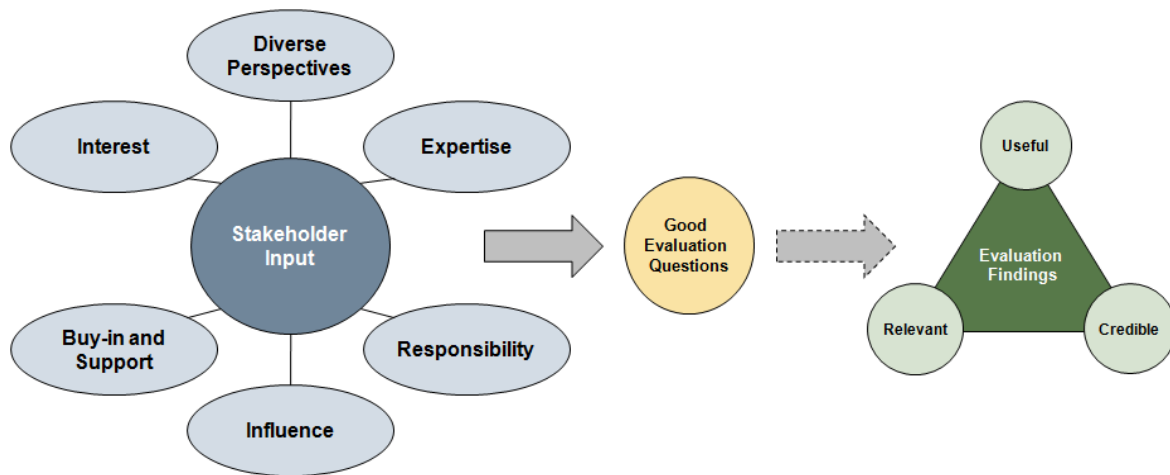
*“Our strategy is to first go to the local politicians to get their buy-in. We let them know what we want them to do, the scope of our resources and what’s in it for them. We ask them, ‘whom do you think are useful informants?’ Once you understand the lay of the land, who the local players are, you start to select individuals whom you think will be productive.”*

*“Identifying stakeholders to involve is determined by what ultimate impact you want to occur. Is it stakeholders who can most directly move a particular issue? Is it those whom you are trying to impact? Ultimately, the decision about whom to involve is based on getting the most authentic voices in the room, but also in the reality of doing the work.”*

- Who can encourage others to support and participate in the evaluation?
- Which supporters of the evaluation have relationships and/or credibility with potential skeptics or opponents of the evaluation?

The range of contributions made by bringing different types of stakeholders to the table is illustrated in Figure 4.

**Figure 4: Relationship Between Stakeholder Contributions, Evaluation Questions and Findings**



*Casting your net.* As you think about answering each of the questions to develop your list of stakeholders, remember that the more voices you hear from and engage in the question development process, the more likely your evaluation’s findings will be useful to a broad range of audiences. Both, the contacts you already have, as well as those individuals and/or organizations that would be useful to include but whom you do not yet know should be considered in this process. Your network of existing contacts will likely prove fruitful in making new connections. Using a snowball sampling method—whereby you approach individuals you already know and solicit their suggestions for additional stakeholders—can effectively expand the pool of potential stakeholders from which you can draw. It’s important to keep in mind, however, that when you begin to hear similar kinds of feedback, or when you hear consistent patterns of ideas, this is probably a sign that you have reached a point of saturation and you have involved a sufficient number of stakeholders.

*“I find that just hanging out is invaluable—what are people talking about, what are they not talking about, who’s not there? It’s an investment of time that is often short-changed. I try to resist the urge to rush through that process.”*



Stakeholders may be both internal and external to the program or initiative, and could potentially include any of the types of individuals and groups listed in Figure 5. Consider if there are existing groups such as advisory groups, task forces or ad hoc committees that could also play a role in the evaluation question development process. Ultimately, the nature of the program—including what it aims to achieve, the people it serves and the geography it spans—will help to determine which of these and other potential stakeholders should be engaged in the question development process.

**Figure 5: Types of Stakeholders**

<ul style="list-style-type: none"> <li>• <b>Program / Initiative Staff</b> <i>Staff, Leadership, Others accountable for program/project</i></li> <li>• <b>Organizational Leadership</b> <i>Executives, Board of Directors, Advisory boards</i></li> <li>• <b>Grantees</b></li> <li>• <b>Program / Initiative Beneficiaries</b> <i>Participants, Clients, Patients</i></li> <li>• <b>Program / Initiative Researchers and Evaluators</b></li> </ul>	<ul style="list-style-type: none"> <li>• <b>Volunteers</b></li> <li>• <b>Contributors</b> <i>Founders, Donors, Other funders and co-funders, Collaborating organizations</i></li> <li>• <b>Community Groups and Leaders</b> <i>Community-based organizations, Community leaders, Religious leaders, Law enforcement, Community service groups, Business leaders</i></li> </ul>	<ul style="list-style-type: none"> <li>• <b>Experts</b> <i>Expert consultants, Evaluators of similar programs/initiatives, Researchers, Academics</i></li> <li>• <b>Policy Groups</b> <i>Policy makers (local, state, federal), Advocacy organizations, Government agencies</i></li> <li>• <b>Other</b> <i>Staff from similar programs/initiatives, Professional associations, Media</i></li> </ul>
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### **Tips:**

- ☑ Avoid narrow alliances that may alienate some individuals or community groups.
- ☑ Think strategically and politically about whom you wish to include.
- ☑ Use data when available to locate those affected by the program.
- ☑ Within foundations, ask program staff to identify key players.
- ☑ Don't avoid individuals or groups who have perspectives that challenge the status quo—they may offer insights and ideas that would otherwise go undiscovered. And, involving them now may prevent future problems if there are significant disagreements. It is better to negotiate these sooner than later.
- ☑ Consider using existing mechanisms for gathering information to inform the evaluation questions. For example, national advisory committees and findings from environmental scans can provide valuable information that can augment what you learn from other stakeholders.
- ☑ Whenever possible, try to engage relevant community-based organizations as an alternative to individuals who would be very difficult and/or impossible to engage. Their ties to the community and knowledge of key issues will prove invaluable to ensuring that the evaluation provides useful information.
- ☑ Once you have identified potential stakeholders, it is a good idea to step back and ask yourself the following questions:
  - Do the stakeholders represent a mix of perspectives, experiences and roles relative to the program or initiative being evaluated?
  - Do the stakeholders reflect diversity in terms of race, ethnicity, age, socio-economic status, sexual orientation, education, or other important characteristics that are critical for the evaluation to be successful and for the findings to be useful and used? For example, if a program is to benefit those with physical disabilities, have we included stakeholders who have physical disabilities?
  - Are there additional organizations and/or individuals who should be included that have not been identified?
  - Who has the most interest in the program or initiative? Who has the most to gain or lose from the evaluation?

*“I used data to determine hot spots across the state. We then identified men in the population of interest in high incidence counties.”*

*“We identify professional stakeholders through literature reviews and Google searches, and then use a snowball technique. We ask whom they have been working with and who is working on the issue. With community-based groups, we initiate conversations with community leaders to find others we should include.”*

### Step 3: Prioritize the list of stakeholders

Sometimes, the process of identifying a list of relevant stakeholder's results in many more than you can possibly include due to time, feasibility or financial constraints. In these situations, you may wish to go through a prioritization process. For example, you might categorize stakeholders as:

1. **Vital** to the evaluation's success and resulting use of findings
2. **Important** to include for practical or political reasons
3. **Nice** to include if possible given time and resources

Going through a prioritization process should also be helpful in determining if any individuals or groups have been inadvertently overlooked. Reviewing the list of those stakeholders that are vital, important, or nice to include may reveal certain points of view that are well represented, and others that are not.

#### **Tips:**

- Identify whose points-of-view you are least familiar with and determine how important it is that you include their perspectives.
- If you are unsure how to prioritize the list of stakeholders, ask for input from those who might see the program or initiative from a slightly different perspective.
- While you might be inclined to place service recipients or program beneficiaries in the "nice to include" category, this is not advisable. While including these groups may pose some challenges, they often add significant value to the question development process. As such, they should be considered either "important" or "vital" to include.
- Consider keeping this part of the planning process confidential, and be careful with how you communicate who is a priority and who is not. If stakeholders hear that they were a lower priority, it could be understood in a way that was not intended.
- Determine if there are other phases of the evaluation process where your stakeholders will be involved, and how this might affect their level of interest and involvement in the question development process.

Go to **Planning Worksheet #2** to consider what value your stakeholders add to the question development process, and the relative importance of involving them.

#### Step 4: Consider potential stakeholders' motivations for participating

Now that you have identified the stakeholders whom you want to include in the question development process, it's important to think about what will motivate them to participate, since this might influence the strategy you use to invite them, as well as how you might engage them in the process. Stakeholders may be motivated to participate for a variety of reasons.

##### **Commitment to the Goals of the Program or Initiative**

Stakeholders, by definition, are those who have some knowledge of, role in, or relationship to the program being evaluated. They are often motivated to contribute their thoughts to the question development process because they are interested in the issue and would like to have their voices heard. These stakeholders usually want to see the program improve and care about the success of the initiative. Some may even want to contribute to the evaluation process out of a sense of commitment and responsibility to their community, while some see participating in the question development process as a way to get involved with your organization.

##### **Personal Stake in the Program or Initiative**

Many stakeholders are those who are responsible for the program or initiative's success, and as such, have a high stake in the evaluation's outcomes. In some cases, an evaluation's findings may have implications for the future of their position or perceived prestige, and this may motivate them to be involved to ensure that the evaluation provides useful, relevant and credible findings.

##### **Professional Development**

Bringing together stakeholders of different backgrounds and affiliations also provides an opportunity to meet and network with people whom stakeholders might not know. Participating in the development of evaluation questions allows stakeholders to meet and talk with others who share common interests, which might lead to new insights and learning.

##### **Opportunity to Earn Additional Income**

Providing a stipend may serve as motivation for those who might not otherwise consider participating in the question development process. And for some stakeholders, they may even expect or require compensation to participate. This may be especially true for researchers who are funded by grant money and may need to be

Continue working with **Planning Worksheet #2** and note the likely motivations of your stakeholders.

*"People are usually happy to participate... they are anxious for us to know their viewpoint, and we are anxious to hear theirs; they have devoted their lives to these programs so they could do good work. They want the quality of the programs to be very high."*

compensated for activities outside of those funded. Knowing that a foundation or other funding agency will be represented among participating stakeholders may also serve as motivation for other groups to get involved, with hopes that making these connections could lead to a grant or other support for their work.

**Tips:**

- ☑ Consider stakeholders' motivations for participating and whether:
  - compensation will be necessary
  - the extent to which you will need to build in opportunities for networking
  - the extent to which they may be interested in and available for participating in other evaluation related activities.
- ☑ Consider the mix of reasons stakeholders are willing to get involved as you think about what methods will be best suited for engaging them in the question development process.

[Step 5: Select a stakeholder engagement strategy](#)

*Criteria for selecting an engagement strategy.* Once you have identified your stakeholders, it's time to think about *how* you want to involve them in developing the evaluation's key questions. Fortunately, there are several factors you can take into account to help determine the approach best-suited to your circumstances. These considerations will help you to determine if it makes sense to engage stakeholders in person or virtually and which engagement methods— individual meetings, group meetings or surveys—are best-suited to your circumstances.

The following is a list of criteria to consider prior to selecting a strategy:

- Amount of **time** you have to develop the evaluation questions:
  - Depending on the timeline for designing and implementing the evaluation, you may have as little as a week to get input into the evaluation questions, or the luxury of two or three months. If you have little time, you may choose a more informal approach such as phone conversations given that bringing people together often requires more planning time.

Go to **Planning Worksheet #3** and determine which factors are most critical for choosing your engagement strategy.

*"We are exploring to what extent we could or should do this by the Web or phone. But our sense is that you get a lot out of the face-to-face. People appreciate that face-to-face time if you're careful about using people's time."*

- **Budget** to cover the costs of gathering input from stakeholders:
  - While there are economical and efficient methods for engaging stakeholders in the question development process, it is important to consider what financial resources you may or may not be able to apply to this phase of the evaluation. Some strategies may require purchasing refreshments or copying materials, and/or paying transportation costs, honoraria, or Web survey subscriptions.
  
- **Geographic locations** of the stakeholders, and the relative importance of bringing a group of them together in the same physical space:
  - There is great value in bringing people physically together. The importance of visual cues and building relationships are critical throughout an initiative and its evaluation. However, depending on the budget, time constraints, and where stakeholders are located, it may not be efficient or feasible to have them in the same room. Using a virtual engagement strategy may be your best option.
  
- Range of stakeholder **perspectives** and how different personalities and agendas may play out in a group setting:
  - As difficult as it may be to balance competing visions for the evaluation, it is also important to avoid a situation that causes “group-think.” If your goal is to surface a variety of opinions and experiences, then you might want to choose strategies such as brainstorming, focus group interviews, or Appreciative Inquiry.
  
- Extent to which the stakeholders have **existing relationships**:
  - If you are considering bringing people together in the same place and they don’t know each other, you might choose a group process that incorporates experiences that enable participants to get to know one another. On the other hand, if the group knows one another, you might choose a strategy that builds from their previous experiences and knowledge of working with one another.
  
- Stakeholders’ **availability** to engage in the question development process:
  - Like everyone else, stakeholders are likely to be very busy and may not be able to participate in the question development process in person. Understanding how willing and able they are

*“In-person is primarily needed and feasible at the local level where an interpersonal approach works a lot better. For them to trust you, you have to first establish that trust in-person.”*

to be involved will help determine your engagement strategy. If they have limited time, you might want to choose a strategy that gives them the most flexibility, such as a phone interview.




- **Number** of stakeholders you hope to engage in the question development process:
  - If you want to seek input from a large number of stakeholders, you might consider using a two-phased process. For example, you could ask one group of stakeholders to attend a meeting (either in person or virtually), whereby you would generate a list of possible questions. You could then ask a larger group to prioritize the questions by sending them a survey.
- Extent to which the stakeholders are **familiar with evaluation**:
  - It may be important to understand the extent to which stakeholders have been involved in previous evaluations. You might be particularly interested in knowing if they have ever contributed to an evaluation’s question development process. If they have little to no experience with evaluation, consider providing them with some background material or including an overview of evaluation as part of your engagement strategy.
- The degree of **complexity** of the program or initiative being evaluated:
  - If the program or initiative being evaluated is multilayered and complex, you might need to provide background materials that allow stakeholders a more substantive understanding of the program. And, the more complex the program or initiative, the more time you will need to ensure everyone understands what is being evaluated and to reach consensus on where to focus the evaluation.

Figure 6 may help you determine when to use each of the approaches based on the criteria you’ve considered. As you think through the options, remember that you can use more than one approach and that you may wish to use one approach with some stakeholders and a completely different approach with others. In addition, you might use a two-part process where you use one approach, such as a group conference call, followed up with a survey asking participants to prioritize the questions based on what was learned on the conference call.

*“We had to do some up-front education about evaluation—this is how we are going to measure, a review of terms; then we were able to share the theory of change we developed. We gave them five slides ahead of time. In evaluation, you need to be sure you are speaking the same language before you get started.”*

Figure 6: Stakeholder Engagement Strategies and Criteria

	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 well-suited     
  Strategy sometimes well-suited     
  Strategy not well-suited

*Options for engaging stakeholders.* Selecting an approach for engaging stakeholders in the question development process boils down to whether you want to obtain their feedback through:

**One-on-one meetings**

Stakeholders can be engaged individually, both formally and informally. With formal one-on-one interviews, you can use an interview guide to gather information that informs the evaluation questions. On the other hand, flexible or ad hoc conversations can allow you to gather feedback from stakeholders in a more casual way. Both formal interviews and casual conversations can take place virtually via phone or email, or in person.

Go to **Worksheet #4** to choose your stakeholder engagement strategies.



## Group meetings

There are a number of facilitation techniques that can work well for developing evaluation questions in a group setting. The following include some familiar as well as, perhaps, some new approaches.

### **Logic modeling**

Engaging stakeholders in the development of a logic model could be particularly important if there is a lack of clarity and explicitness of a program or initiative's goals and expected outcomes (or if there are significant differences in opinion about why the program exists and/or its purpose). A logic model is a visual depiction of a program's theory of action—how the program is supposed to work. A logic model often helps focus an evaluation by making a program's assumptions and expectations explicit, and increases stakeholders' understanding about the program or initiative. Logic models take many forms, but most include information on the underlying assumptions of the program, the resources needed to support the program, the activities of the program, the outputs, and the short-, intermediate-, and long-term outcomes, objectives, or impacts the program is expected to achieve. Developing a logic model with a group of stakeholders can lead to an informed discussion about what aspects of the program should be evaluated and a resulting list of key evaluation questions.

### **Mind mapping**

A mind map is a diagram used to represent words, ideas, tasks, or other items linked to and arranged around a central key word or idea. Within an evaluation context, stakeholders construct a collective view of the activities, actors, purposes, and other topics by arranging concepts or practices into groupings, branches, or areas with the goal of representing relationships and connections. By graphically representing the program or initiative being evaluated, the group can then develop questions based on the components, elements, or relationships that are of interest.

### **Appreciative Inquiry**

Appreciative Inquiry (AI) is a process that explores the best of what is already present in an organization or community in an effort to find ways of enhancing and doing more of what has worked in the past. Engaging stakeholders in the question development process involves: a) conducting appreciative interviews concerning some aspect of the program or initiative being evaluated; b) sharing stories with others in the group; and c) identifying themes in the stories. The result is a collective understanding of what the program looks like when it's

*“The informal way we engage stakeholders is by being out and about and talking to people about what’s going on and the issues of concern to them. We are in D.C. so we have access to the agencies. We make use of personal contacts to be out talking to people.”*

*“Using Appreciative Inquiry allowed us to start off with paired interviews where we invited stakeholders to tell a story about a time they felt the program was clearly achieving its goals—a time when they were proud and excited to be associated with the program. The interviews provided a safe and energizing way to begin the evaluation conversation. From the themes identified in their stories, we developed the key evaluation questions. The process honored a multicultural set of voices and experiences, and prompted many to say, ‘This didn’t feel like evaluation!’”*

successful. Participants then use the themes to collaboratively determine the focus of the evaluation and the questions the evaluation should address.

### ***Role playing***

This technique invites people to assume the roles of different stakeholders in order to understand their perspective on the issue, program, or initiative being evaluated. Role plays can be scripted, semi-scripted or unscripted; it is a good idea, however, to provide some information for each role so that individuals can represent their role effectively. It is important to debrief stakeholders' experiences with the role play by asking the following questions: What was it like to be this person/group? How did this experience affect your thinking or understanding about the program? What surprised you? This conversation can then lead to a facilitated dialogue on identifying the key evaluation questions.

### ***Brainstorming/Nominal Group Technique (NGT)***

There may be times where you want the stakeholder group to be creative and generative in their thinking about potential evaluation questions. Brainstorming is an intensive and energetic group discussion where every participant is encouraged to think aloud and suggest as many ideas as possible. Participants are asked to withhold analysis, discussion or criticism of the ideas until the brainstorming session is over and the group moves into discussing the various questions listed. An alternative to brainstorming is the nominal group technique (NGT). This approach invites participants to individually brainstorm and write down the questions they think the evaluation should address. All of the responses are written on flipchart paper where they can be clarified, though not critiqued. The whole group votes on the evaluation questions they believe would best serve the various information needs of the stakeholders. The questions that receive the highest score or number of votes would reflect the stakeholders' collective views on the most important evaluation questions.

### ***Focus group interviews***

If you want to engage stakeholders in a more structured way, then a focus group interview may be a good option. This strategy is best used with a group of 6–12 stakeholders and requires one to two hours. Focus groups are particularly effective for exploring attitudes and feelings and to illuminate issues that have not been surfaced. Using an interview guide, the facilitator asks a series of open-ended questions

focused on the program or initiative being evaluated. Participants' thoughts may be recorded on flipchart paper so that they can be seen and discussed. The outcome of a focus group interview could be a list of questions and/or a clearer understanding of what the evaluation should focus on.

### ***Discussion of an article or presentation***

There may be situations where you want your stakeholders to react to something they have read or heard to help clarify the evaluation's focus and key questions. For example, you might send out the results from a new research study to stakeholders and when you come together, you ask them to engage in a group discussion about the findings and how these might inform the current evaluation.

Alternatively, you might invite guest speakers to discuss the issue that the program or initiative is trying to address, as a means for inviting dialogue with the stakeholders to surface various perspectives and insights. Such dialogue generates a more insightful set of evaluation questions.

### ***Moderated discussions (online/video/phone)***

When it is not possible to bring stakeholders together in the same physical space, you can engage them virtually through video-, telephone- or Web-based conference calls or online media. For conference calls, it is important to plan in advance what you will be asking the participants to think about and do during the discussion. For example, you may want to develop a discussion guide to send out in advance or upload documents for people to look at on their computers (while on the computer or phone). This approach requires good moderator skills to ensure that all voices are heard and that no one dominates the conversation. Communicating virtually is also often more difficult since our ability to pick up visual cues is limited. Other computer-based approaches could leverage dynamic online collaboration tools (e.g., social networking sites, wikis, blogs) to share information and solicit stakeholder input.

### **Surveys**

Surveys are a way of gathering input from stakeholders who may be difficult to engage in an individual or group setting. Surveys can be used to engage stakeholders at a single point in time or on a repeated basis, as with the Delphi technique.

#### ***One-Time Survey***

A survey could be developed and sent to a group of stakeholders as an

*“We hold small, invitational meetings with 30 to 40 people around a specific topic. We commission a background paper on what’s known about the topic, and the meeting is to review the state of the art and to review pressing research questions. We ask paper authors to present background or perspectives on the topic and allow discussion on different aspects of the topic.”*

e-mail attachment, or developed using one of the many inexpensive Web-based survey vendors. A one-time survey is an efficient, low-cost approach to getting information from a broad range of stakeholders. Clarity and precision in the questions you are posing are critical to getting useful feedback from a survey. A strong understanding among respondents of the program or initiative being evaluated is also helpful for ensuring useful results.

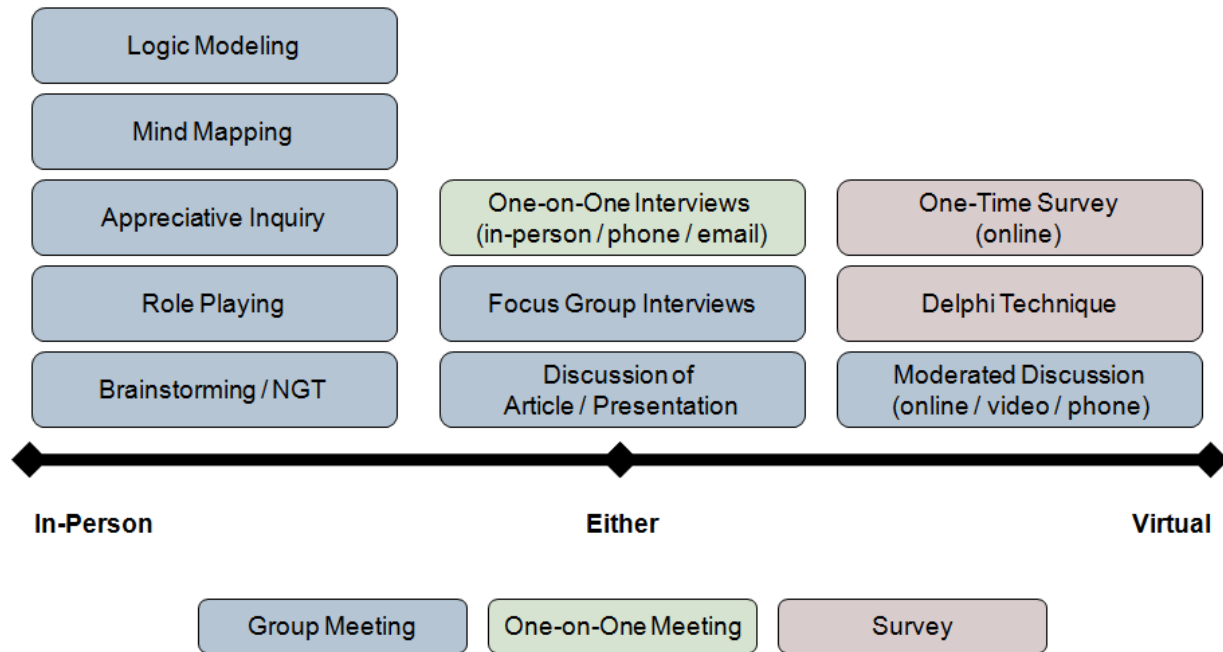
### ***Delphi Technique***

The Delphi process is particularly effective when there are many competing views and experiences related to the program or initiative being evaluated, stakeholders are many, and they are geographically dispersed. With this strategy, stakeholders write down and submit a list of questions they think the evaluation should address. The questions are collected and collated by the facilitator and then sent out to all of the stakeholders. They are then asked to rate the relative importance of the questions using a Likert scale. These results are tabulated, and sent out to the stakeholders for another round of rating/voting. This process is repeated until the final list of questions has emerged. The Delphi process results in a consensus that reflects the participants' combined perspectives and knowledge. While this strategy does require concerted effort, if you think it is vital to engage a large number of stakeholders, then this approach might be well worth the time and energy.

Figure 7 illustrates the various stakeholder engagement approaches, grouped by in-person and virtual techniques as well as those that can be employed in either setting. Your choice of strategy will depend on the stakeholders' characteristics and motivations and your reasons for including them in the question development process (*as determined in Steps 2–4*).

*“A Delphi process is good for addressing subjects where we didn't have a lot of baseline information. When you hit someone cold, it's hard for them to think, 'This is what we need,' so we tried to come up with a systematic approach for getting feedback. We used the Delphi process to add validity and to get community input.”*

**Figure 7: Stakeholder Engagement Techniques**



*Generating the evaluation questions.* Each of the stakeholder engagement approaches will help you collect valuable information that will inform the evaluation's key questions. Regardless of the approach(es) you use, it is important to make efficient use of everyone's time and energy. Think carefully about the input you hope to receive and frame your interactions accordingly. The following questions can be embedded into any one or more of the engagement strategies:

- As you think about the program or initiative, what would success look like? What would we need to know to explore the extent to which the program is effective or successful?
- What do you know about this program or initiative? What do you still not know that would be important to know?
- What are you really curious about? What do you wish you knew about this program or initiative?
- What questions seem to come up repeatedly, in conversations with others or in your own work, concerning the effectiveness, impact, and/or success of this program or initiative?
- Imagine yourself in various other roles— policy-makers, program designers, program administrators, researchers, clients, community members, health care providers, organization leaders. What do you want to know about the program or initiative?

**Tips:**

- ☑ In-person approaches are usually better for locally based programs or initiatives. Virtual methods are useful for large-scale programs with geographically dispersed stakeholders.
- ☑ Make sure that each person has an opportunity to participate and to have her/his voice heard.
- ☑ Reflect on your own skills and knowledge for implementing the activity. For example, if you have strengths in interviewing, but have less experience facilitating large group processes, then consider the implications of this situation when choosing your engagement strategy.
- ☑ Consider the extent to which you have the necessary personnel and financial resources to support the engagement approach.
- ☑ Consider the likelihood that the activity will produce high-quality and useful information for developing the questions.
- ☑ Assess how much stakeholders already know about the program or initiative being evaluated and about the evaluation process itself. Decide how much time you will need to bring them up to speed

*“We would approach the stakeholders with our proposed scope and the questions we need to answer. We would propose this as where we are at, these are the questions we think are important... what do you think? What are the questions that should be answered?”*

*“We grouped the information we gathered together in terms of very rough topics, and then took four hours to [meet with the subjects of the evaluation]. They responded to it—and some of it made them angry—and they worked with us to decide what we would ask. [We talked about] what was missing—they had a lot that they thought was missing. In the end, it was their sorting of the data that provided the framework for the interview guide.”*

about the program or initiative or evaluation practice prior to involving them in developing the evaluation questions.

- ☑ Keep stakeholders' motivations to participate in mind as you select your approach(es). For example, if everyone is participating because of their commitment to the program or initiative, you might choose to host an in-person group discussion rather than using a Web-based survey. On the other hand, if their reasons are mostly concerned with being paid to participate, and you have limited resources, you might choose an e-mail approach to solicit their feedback on the questions.
- ☑ Giving stakeholders something specific and concrete to which they can provide feedback may generate more useful and practical insights. Think about grounding their responses by providing a draft set of questions or areas of interest and then asking them what they would add and/or change.

### **Challenges to Engaging Stakeholders in the Evaluation Question Development Process**

While there are many benefits to engaging stakeholders in developing evaluation questions, doing so is not without challenges. The following are some situations you might encounter, and some suggestions for how you might address the challenges.

#### ***Time Limitations***

Most of us are often racing against the clock – having more to do with less time to do it. There are situations when there is even less time to involve stakeholders in developing the evaluation questions. When you experience this, you might:

- Review the minutes or notes from previous gatherings of stakeholders to identify themes, issues, and comments that could inform the evaluation questions.
- Stay informed and attuned to issues that may lead to future evaluations. If you can anticipate that an evaluation will be expected down the line, you can incrementally gather stakeholder input so that when the evaluation is called for, you will be ready.
- Make sure that the engagement approaches are well thought out and planned so that everyone's time is maximized.
- Establish and communicate precise expectations.

*“Community leaders are extremely busy, so we are very clear about what our expectations are, whether it be one conference call, two conference calls, one survey. We have to be respectful of their time and have fairly short timeframes.”*

### ***Differing Opinions, Priorities, and Information Needs***

Stakeholders often have different interests and needs in terms of what they hope an evaluation will address. To manage those differences, you might:

- Establish decision making roles and responsibilities.
- Prioritize questions based on who needs the information, when, and for what purposes.
- Choose appropriate methods to manage disagreement and/or conflict.
- Set the stage for a two-way dialogue between evaluator and stakeholders.
- Establish a clear understanding about who will make the final decision regarding the final set of evaluation questions.
- Make note of questions that could potentially be addressed in future evaluations/research studies.
- Recognize the value of stakeholders' contributions.

### ***Stakeholder Tensions***

In your efforts to capture a range of perspectives, opinions, and experiences among your stakeholders, you may encounter tension among your participants. Bringing stakeholders together who have different roles relative to the program or initiative being evaluated is important, so bear in mind some strategies for managing the tensions that may arise:

- Consider beforehand how these relationships could affect the roles of each player in the discussion, and plan for how you might create a more equitable balance of power. This might mean rethinking the engagement approach you've chosen.
- Use an ice breaker to create a comfortable climate for sharing ideas and experiences.
- Use a facilitation process that ensures all voices are heard.

### ***Differing Knowledge of Evaluation***

Not all stakeholders have the same depth of experience or understanding about evaluation, and may have differing assumptions about the purpose of the evaluation, how evaluations are designed, and/or what is expected of them in the engagement process. In addressing potential differences, the following considerations should be taken into account:

- Help stakeholders grasp both the possibilities and constraints (e.g. time, resources) of the evaluation process so that they understand the parameters of the effort to which they are being

*"We say up front that the meeting discussion is not neat and clean. Our job is trying to distill what was said and come up with a clearer agenda... but we're not looking for clearance from everybody."*

*"We always figure if it's too unanimous we know we haven't done a good enough job. We try to get people to talk about why there are differences – different priority, different order, different belief in what the evidence says, where more research is needed."*



asked to contribute.

- Outline clear and well-defined instructions and opportunities for providing information that will contribute to the evaluation questions.
- Spend the necessary time to educate stakeholders about the issue, program, and/or evaluation.
- Provide something concrete and specific to which stakeholders can respond. This can help focus stakeholders' attention on what is important, and garner feedback that is relevant and useful to question development and refinement.

### **Stakeholder Indifference**

Some stakeholders you wish to involve may not be particularly motivated to participate, and after considering the motivations of each of the groups and/or individuals you would like to include, you should consider the following when planning how to engage those who may be uninterested in participating:

- Think through what you hope each stakeholder will bring to the process, and what you think they will get out of it.
- Be clear about what you have to offer them. Offering to support some of their efforts of which you are aware could provide a good give-and-take opportunity. Stakeholders may also be motivated by a clear understanding of the importance and relevance of the evaluation and how the findings will ultimately be used.

### **Stakeholder Accessibility**

Gaining access to stakeholders whom you don't already know can be difficult, particularly if privacy issues arise. The following suggestions may help you to identify and connect with those stakeholders:

- Develop relationships with those who are in a position to provide a connection to the groups of interest. In the case of health and health care, the Health Insurance Portability and Accountability Act (HIPAA) may limit your ability to contact patients whom you do not already know. The clinical institutions where they are seen can help obtain the patients' permission to provide you with their contact information.
- Research and leverage relevant registries or member lists to obtain the contact information you need.

*"We often don't have resources to offer, so we're specific in our needs. If they need letters of support from us later down the line, we provide those, or we give a presentation if they ask us to. There is reciprocity."*

*"Because of HIPAA, it was difficult to get access to patients. Providers can't give the names of their clients."*

## ***Conclusion***

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Once you have completed the following set of worksheets, you are well on your way to designing an evaluation that meets a variety of stakeholders' information needs and ultimately, increasing the likelihood that the results will be used in meaningful ways. Remember that while this guide was specifically focused on engaging stakeholders in an evaluation's design, it is equally important to engage stakeholders in a program's design as well as in the development of a program or initiative's strategy. Many of the tools and tips in this guide can be used for those purposes, too.

## Stakeholder Engagement Planning Worksheets

### Planning Worksheet #1: Identifying Relevant Stakeholders (Step 2)

This worksheet will help you think through the various types of stakeholders and identify those who are relevant to the program or initiative being evaluated.

<b>Types of Stakeholders</b>	<b>Possible Stakeholder Groups</b>	<i>Place an X next to those whom you might want to include in the question development process</i>
<b>Program/Initiative Staff</b>	Program/Initiative Staff	
	Program/Initiative Leadership	
	Others accountable for Program/Project	
<b>Organizational Leadership</b>	Executives	
	Board of Directors	
	Advisory Boards	
<b>Grantees</b>		
<b>Program/Initiative Beneficiaries</b>	Participants	
	Clients	
	Patients	
<b>Program/Initiative Researchers and Evaluators</b>	Researchers	
	Evaluators	
<b>Volunteers</b>		
<b>Contributors</b>	Founders	
	Donors	
	Other Funders and Co-Funders	
	Collaborating Organizations	
<b>Community Groups and Leaders</b>	Community-Based Organizations	
	Community Leaders	
	Religious Leaders	
	Law Enforcement	
	Community Service Groups	
	Business Leaders	
	Other	
<b>Experts</b>	Consultants	
	Evaluators of Similar Programs/Initiatives	
	Researchers/Academics	
<b>Policy Groups</b>	Local Policy-Makers	
	State Policy-Makers	
	Federal Policy-Makers	
	Advocacy Organizations	
	Government Agencies	
<b>Other</b>	Staff from Similar Programs/Initiatives	
	Professional Associations	
	Media	

## Planning Worksheet #2: Determining Stakeholder Roles, Priorities and Motivations

(Steps 2–4)

This worksheet will help you finalize the list of individuals and groups you would like to engage, and determine what each of them would bring, how important it is to involve them, and what might motivate them to participate.

<b>Who are your stakeholders?</b> <i>(Refined list of individuals and organizations, from Worksheet 1)</i>	<b>What does each stakeholder bring to the evaluation?</b> <i>(Check all that apply)</i>							<b>How important it is to have their perspectives and experiences represented?</b> <i>(Check level of importance)</i>			<b>What may motivate the stakeholders to participate?</b> <i>(Check all that apply)</i>				
	Interest	Diverse Perspectives	Expertise	Buy-in and Support	Influence	Responsibility	Other	Vital	Important	Nice	Commitment	Personal Stake	Professional Development	Income	Other

### Planning Worksheet #3: Considering Stakeholder Engagement Strategies (Step 4)

With this worksheet, you can consider and prioritize the various challenges you might have when engaging stakeholders in the question development process. You can then determine which engagement strategies are best suited to your needs.

Considerations for Selecting Engagement Strategy	Amount of <b>time</b> you have to develop the key questions is significantly limited	<b>Budget</b> to cover the costs of gathering input from stakeholders is limited	<b>Geographic locations</b> of stakeholders are dispersed	<b>Range or stakenoer</b> perspectives, experiences, and/or characteristics vary widely	<b>Lack of existing relationships</b> with and/or among stakeholders	Stakeholders have very limited <b>availability</b>	There are <b>many potential stakeholders</b>	Stakeholders have little <b>familiarity with evaluation</b>	The program/initiative being evaluated is <b>complex</b>
<b>Is this a critical factor?</b> <i>(Rank top three considerations)</i>									

### Stakeholder Engagement Strategies and Criteria

	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 well-suited



Strategy sometimes well-suited



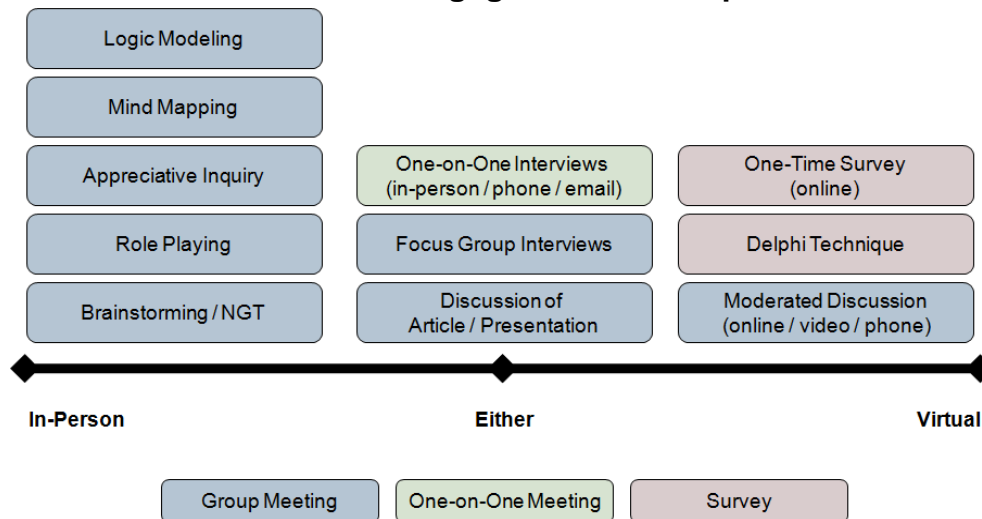
Strategy not well-suited

### Planning Worksheet #4: Selecting an Engagement Strategy (Step 5)

This worksheet will help you to plan the specific engagement techniques you will use, determine with whom you will use them and when, and the resources required to do so. This can then serve as an engagement plan with which to proceed in gathering stakeholder input.

<b>Engagement Technique</b>	<b>I will use this technique</b> <i>(Check all that apply)</i>	<b>To engage these stakeholders</b> <i>(List individuals and/or groups)</i>	<b>Timing</b> <i>(List sequence and/or dates)</i>	<b>Resources needed</b> <i>(List funding, staff, other resources required)</i>
<b>One-On-One</b>				
One-on-One Interviews				
<b>Group Meetings</b>				
Logic Modeling				
Mind Mapping				
Appreciative Inquiry				
Role Playing				
Brainstorming/NGT				
Focus Group Interviews				
Discussion of Article/Presentation				
Moderated Discussions (online/video/phone)				
<b>Surveys</b>				
One-Time Survey				
Delphi Technique				

### Stakeholder Engagement Techniques



### **Evaluation Context**

A community foundation, which is strongly committed to improving the health and well-being of its citizens, provides funding for a variety of health-related initiatives. One such initiative, 3-2-1-Action Health!, seeks to improve the health of adults by promoting physical activity, especially for groups that are not currently active. The foundation's program officer responsible for the initiative, Linda, believes that an evaluation will be instrumental in: 1) determining the effectiveness of the initiative for future improvements and 2) deciding whether the program should be replicated and expanded. She plans to develop an RFP in order to solicit proposals from professional evaluators who will design and implement the evaluation. To ensure that the evaluation accounts for the broad range of experiences, perspectives and information needs of those associated with the initiative and yields findings that are useful, relevant and credible, she wants to include various stakeholders in developing the evaluation's key questions.

### **Step 1: Prepare for Stakeholder Engagement**

As someone who is still relatively new to the foundation and has been focused on managing individual grants and developing relationships with 3-2-1 Action Health! grantees since in the start of her program officer role, Linda wants to revisit the broader context of the initiative before diving into the question development process. She reviews relevant documents describing the history and goals of the initiative and talks with some of her longer-tenured colleagues to learn more about how and why this initiative was developed. From these conversations, she develops a "logic model" that describes the underlying assumptions, resources, activities, outputs, and short- and long-term goals or outcomes. This effort results in a visual description of how the 3-2-1-Action Health! initiative is supposed to work, and what it would look like if it were successful. After developing the logic model, Linda shares it with her colleagues for feedback, and makes a few revisions. She admits to being a bit surprised at how little consensus there was on the expected outcomes of the project. Some of her colleagues thought the initiative should lead to life-long behavioral change, while others thought this goal was too bold and said they would be satisfied with a change in thinking or understanding about the value of physical activity. In the end, Linda decided to have both sets of goals represented on the logic model.

### **Step 2: Identify Potential Stakeholders**

Linda knows that it is important to engage a variety of stakeholders in developing the evaluation questions, since different individuals and groups have diverse information needs, interests and experiences with the initiative. She also knows it is important to go beyond the foundation program staff's knowledge and experience with the program, so she thinks through her networks of contacts who might be helpful to engage in developing the evaluation questions. She remembers that her program officer counterpart at a foundation in a neighboring state funded and evaluated a similar initiative several years ago. She also thought of the keynote speaker—a well-respected public health

researcher from the state's largest university who spoke at the 3-2-1 Action Health! initiative's annual convening last month.

To further develop her list of relevant stakeholders, Linda thought of several grantees that might be willing to participate in the question development process and could recommend others involved in the initiative or similar kinds of programs. From conversations with these grantees, she was able to develop a list of stakeholders that included state department of health representatives, local American Diabetes Association staff, local health clinic providers, program participants from several communities and other regional collaborating funders.

After talking with each of the grantee organizations, she asks her foundation colleagues for feedback on her preliminary list. A program officer working on state-level advocacy notes that the governor's wife has become very active in promoting public health issues and recently conducted a statewide tour of public speaking engagements in support of physical activity and improved nutrition for all of the state's residents. Another program officer suggests that Linda think beyond the "usual prospects" and notes that a new director of a large locally-based insurance company has been vocal in her support of increased physical activity as a way to prevent chronic illness and reduce health care costs. Linda considers both of these suggestions and then adds them to her list.

From her list, Linda considers what each of the stakeholders would bring to the process to be sure that engaging them will be worth everyone's time. She outlines what she would expect each stakeholder to contribute.

- Linda's program officer counterpart at the neighboring state's foundation would bring **knowledge and experience** based on the evaluation he has done of his foundation's similar initiative, as well as his commitment to such programs.
- The public health researcher would contribute **expertise** in the form of relevant research findings concerning the relationship between physical activity and improved health outcomes.
- Grantees would bring their knowledge of how the initiative is being implemented and are positioned to inform the evaluation questions given their **responsibility** for implementation.
- The state department of health would bring important **influence** at the local level, and would contribute a different **perspective** as a government agency.
- American Diabetes Association staff would lend **influence** in the form of their reputation as a nationwide organization committed to working on diabetes-related issues. As a high-profile organization, its involvement would also help to build **buy-in** for the evaluation and its eventual findings.



- Health clinic providers would provide important **perspective** as those with the **responsibility** for reaching initiative participants directly.
- Program participants would bring a valuable **client perspective** as those served by the initiative, with potential insights on questions that address how the initiative is meeting its goals.
- Collaborating funders would contribute an additional **funder perspective** and share **responsibility** for the success of the program through their grant support.
- The Officer of the Governor's First Lady would bring **influence** given her position and ability to affect public support and policy decisions.
- The insurance company director would provide additional **perspective** on the role and importance of physical activity and could help to establish **buy-in** for the evaluation and its findings among other insurers.

As she looks at this list, Linda realizes that most, if not all of these people could be considered advocates of the initiative and would lend important **support** for the evaluation. She is concerned, though, that such uniformity of opinion could limit the credibility of the evaluation's findings. She remembers being at a meeting recently, where a state legislator's aide was arguing that initiatives such as 3-2-1 Action Health! were ineffective. She decided to add him to the list of potential stakeholders. When she counted all of the stakeholders, the total was 30 individuals.

### Step 3: Prioritize stakeholders

While Linda would ideally like to involve all 30 stakeholders, she needs to prioritize whom to include in order to develop the questions in a timely manner. So, she considers the contribution of each stakeholder and notes whether she/he would be *vital*, *important* to the question development process or just *nice to have*. Her review results in five stakeholders in the *vital* category, 15 in the *important* category, and 10 in the *nice to have* category.

It is imperative that Linda include at least the executive director and program manager at a grantee organization working with a large network of regional clinics to implement the initiative. She knows from her experience with this grantee that there are two health clinics that have been particularly engaged with managing and implementing the initiative. Linda thinks the managers of those clinics would be crucial to involve given their position and ability to act on the evaluation's findings to improve the implementation and subsequent outcomes of the initiative. She also needs to include the program officer at the partnering foundation since the evaluation findings would potentially have implications for a number of related initiatives they are planning to launch in the coming year.

Given the influence, expertise and perspectives they would bring, Linda adds 15 *important*

stakeholders to the five stakeholders designated as *vital*. Thus, she decides to focus on the 20 stakeholders who are both “vital” and “important” to the question development process and will develop her engagement strategy with that group in mind. She can then consider inviting the additional 10 stakeholders to participate once her strategy is set.

#### **Step 4: Consider stakeholders’ motivations**

Linda also considers what would likely motivate each of the stakeholders to participate so that she has those motivations in mind as she determines her best approach for engaging the stakeholders.

Given the widespread commitment to the program among Linda’s list of stakeholders, many of them would be likely to participate given their interest in improving the quality of the program and its impact on the people it serves. Depending on the strategy Linda selects, an added incentive for the stakeholders could be the opportunity to network with individuals working on this issue in different sectors. The presence of several funders, the organizations implementing the initiative, a researcher on the topic, and a number of government agency officials would potentially be seen as a valuable networking opportunity.

Linda also thinks that her counterpart at the other foundation would likely be willing to participate since the two of them have talked about collaboratively funding a replication of the initiative if the evaluation findings prove to be promising for expansion.

Her one concern is program participants. She plans to talk with local health providers about the selection of program participants when she calls them to request their participation in the question development process. Their knowledge and experience should be useful in identifying the range of backgrounds and perspectives to be tapped among program participants and they will probably have ideas on how to secure their participation in the question development process. It could be that an opportunity to share their experiences with the initiative will suffice, or offering modest compensation may be required.

#### **Step 5: Select stakeholder engagement strategy**

Linda is ready to design an engagement strategy that is well-suited to her stakeholder engagement needs. She first thinks through a set of criteria to help her assess her options. She considers logistical factors, including the *timeline* for the evaluation, her *budget* for the question development process and the *number, geographic locations* and likely *availability* of the stakeholders she hopes to involve. She also thinks about the individuals she hopes to engage, including the range of their *perspectives*, the extent to which there are *existing relationships* with and among stakeholders, and stakeholders’ *familiarity* with evaluation. She also considers the *complexity* of the initiative to allow for adequate up-front explanation.

Linda identifies the most pressing constraints for which she must account. She is on a relatively short timeline for the question development process and she is aware of the range of perspectives that

would potentially be represented in the room. She also has a very limited budget for the question development process, as virtually all of the 3-2-1-Action Health! evaluation budget will go toward the evaluation design and implementation. Linda considers the most appropriate strategies given her budget and time constraints and the potential tensions that could arise among stakeholders given their diverse views and interests.

She decides to focus first on her five key stakeholders—the director and program manager from the grantee organization working with a network of clinics to implement the 3-2-1-Action Health! initiative, the two clinic managers most actively involved in implementing the initiative, and the program officer from the partnering foundation. Because Linda has developed close relationships with the staff members from the grantee organization and the other foundation’s program officer, and had met the clinic managers at last month’s initiative convening, she decides to schedule **one-on-one phone interviews** with each of them to discuss their information needs and thoughts on what the evaluation’s key questions should address. She prepares several questions that she wants to be sure to cover in each conversation, but wants to be flexible enough to provide each stakeholder space to describe what they see as key information needs and questions to be answered.

After gathering a set of questions based on her five one-on-one interviews, she can engage the rest of the stakeholders through an **online survey** where they will be asked to rank the proposed questions, and to provide thoughts on key questions that might be missing. Though it won’t provide stakeholders the networking opportunities that might be a compelling incentive for an in-person meeting, this approach works well given her short timeline, and respects the limited availability of busy stakeholders. She hopes that the initiative participants, in particular, who might be hesitant to engage in a way that requires a significant commitment of time, will be willing to give 20 minutes for the survey. Linda plans to clearly explain that their participation will help the initiative improve and better respond to participant needs in the future. Providing the questions that come out of the one-on-one conversations for the broader group of stakeholders will give them something concrete to respond to, while still allowing them to make their thoughts known in a more open-ended way.

Linda will take the feedback from the survey to finalize the five to seven evaluation questions to include on the RFP for the evaluation’s design and implementation. Linda will also note any questions that are suggested that may be relevant for future evaluation or research studies. She will be sure to thank all of the participating stakeholders for their involvement and add them to her distribution list to be kept up-to-date throughout the subsequent phases of the evaluation process.

## Appendix B: Evaluation Resources<sup>1,2</sup>

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\*Patton MQ. *Utilization-Focused Evaluation* (4<sup>th</sup> ed.). Thousand Oaks, CA: Sage, 2008.

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<sup>1</sup> The Robert Wood Johnson Foundation does not endorse any one evaluation model, design or method. It believes that each evaluation should be tailored to the particular questions, stakeholders' information needs and evaluation context.

<sup>2</sup> Those with an asterisk provide more detailed discussions about the role of stakeholders in an evaluation.

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### Journals

- *American Journal of Evaluation*
- *New Directions for Evaluation*
- *Evaluation Review*
- *Evaluation and the Health Professions*
- *Evaluation and Program Planning*
- *Evaluation*

### Web sites

- American Evaluation Association [www.eval.org](http://www.eval.org)
- Claremont Graduate University Professional Development Workshops [www.cgu.edu/sbos](http://www.cgu.edu/sbos)
- The Evaluator's Institute [www.evaluatorsinstitute.com](http://www.evaluatorsinstitute.com)
- The Evaluation Center at Western Michigan University [www.wmich.edu/evalctr](http://www.wmich.edu/evalctr)

### Appendix C: List of Interviewees

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Name	Title and Organization
Sharon B. Arnold	Vice President, AcademyHealth Director, Health Care Financing and Organization Initiative
Nancy Barrand	Special Advisor on Program Development, Robert Wood Johnson Foundation
Kipling J. Gallion	Assistant Professor of Epidemiology and Biostatistics, University of Texas Health Science Center at San Antonio Deputy Director, Institute for Health Promotion Research
Claire B. Gibbons	Program Officer, Robert Wood Johnson Foundation
George F. Grob	President, Center for Public Program Evaluation
Astrid Hendricks-Smith	Director of Evaluation, The California Endowment
Mona Jhavar	Evaluation Officer, The California Endowment
Robin Lin Miller	Associate Professor, Michigan State University
Lori Nascimento	Evaluation Officer, The California Endowment
Amelie G. Ramirez	Founding Director, Institute for Health Promotion Research Professor of Epidemiology and Biostatistics, University of Texas Health Science Center at San Antonio
Janice B. Yost	President, The Health Foundation of Central Massachusetts



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