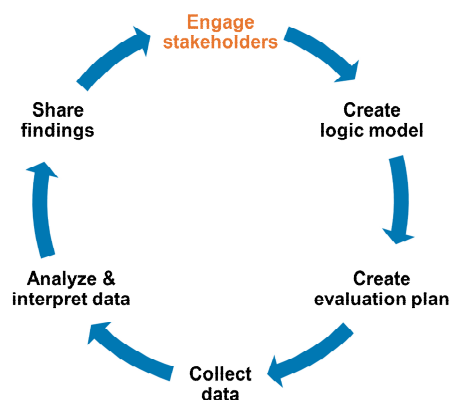


Engaging stakeholders

This tool is part of an evaluation toolkit called Measuring What Matters. It includes information about how to complete this essential step of evaluation, including templates and a case study example of how a typical community organization — *HealthConnect* — might complete this step for their community health worker program.



Why engage stakeholders?

The first step in evaluation is engaging your stakeholders — those who are connected with or have an interest in the program. Involving stakeholders in every stage of your evaluation builds buy-in, gives a voice to those affected by the program, identifies equity concerns, and ensures that the evaluation is useful to the greatest number of people.

Who are your key stakeholders?

- **People who support and carry out the program:** collaborative partners, program managers, staff
- **People served or affected by the program,** as well as other service providers and partner organizations
- **Decision-makers:** people who are in a position to create change, take action, or decide funding, such as your leadership/governance boards, funders, and policy makers

How do you engage stakeholders?

Ask stakeholders for their input and actively listen to their opinions as you plan and carry out the evaluation. A great first question is "What does success for this program look like to you?" Stakeholders may advise on evaluation design and directly participate in the evaluation itself, either by gathering or helping interpret data. Ideas about how to successfully involve stakeholders will be provided throughout this toolkit.

Stakeholder checklist

A comprehensive and thoughtful evaluation plan is an essential component of a quality evaluation. Engaging your stakeholders is how you begin – but it also is something that is included throughout your evaluation! Use the items in this checklist to ensure you've followed these key steps.

Have you identified your key stakeholders?

- People who support and carry out the program
- People served or affected by the program
- Decision-makers and those who request the evaluation

□ Have you talked with stakeholders about what they are interested in learning from the evaluation?

Engaging stakeholders throughout your evaluation is invaluable because it:

- Increases the chance that evaluation will be useful and equitable
- Enhances credibility of the evaluation
- Increases understanding of results
- Help avoid potential conflicts or misunderstandings about the purpose of evaluation or findings.

Involvement in the evaluation provides the opportunity for stakeholders to learn more about your work. This can result in:

- Bringing in more talent and expertise to the evaluation
- Spreading responsibilities and roles, including sharing power with affected communities
- Creating new or additional access to resources

Purposeful engagement is also a way to address equity issues as you ask evaluation questions and collect data that is useful to a range of stakeholders who are central to your program.

Understanding what your stakeholders are interested in learning is the cornerstone of the process.

By doing so, you can:

- Show respect and ensure cultural responsiveness
- Better understand cultural context, structural conditions, and bias
- Strengthen the evaluation through diversity of perspectives

The Stakeholder Engagement Plan Template includes questions to spark this kind of conversation.

□ Did you determine what role each stakeholder group or individual will play in the evaluation?

Potential roles for stakeholders might include:

- Designing the evaluation
- Constructing data collection protocols/instruments and collecting data
- Assisting with analysis and interpretation
- Being an advocate for your program and/or the evaluation
- Raising funds
- Communicating/disseminating findings
- Serving as a member of an advisory group

□ Do you have a plan for keeping stakeholders involved and engaged in the evaluation, including the ways you will communicate and exchange information?

A great way to figure out how to involve stakeholders is to talk about it! Have a conversation upfront about how they want to be involved and ask them:

- What is important to you? What do we need to accomplish?
- What are the critical questions at this time?
- What types of bias, context or inequities should we be aware of as we plan and implement the evaluation?
- How can you be involved in this evaluation, and how would you use the results?
- Is there a regular way to communicate findings and share lessons learned?

As you begin to plan for regular stakeholder engagement, think about what will make things easiest for them:

- Is there a standing meeting you can use for regular stakeholder feedback and engagement?
- How can you equitably engage participants? Will you need to provide incentives for some stakeholders to participate, particularly those who receive services from your program?
- Are there key points you want to make sure you check in with your stakeholders about?

□ Have you used the Stakeholder Engagement Template?

Once you have an initial plan, write it down in the Stakeholder Engagement Template and check back with them to make sure you are on the same page. Provide regular updates to your stakeholders to keep them engaged and invite feedback throughout the evaluation process.

Case study: The *Health Connect* program team started by brainstorming who their stakeholders might be and how they would be involved. Once they had completed a draft of the Template, they were ready to bring everyone together for a conversation and finalize their plan.

The Center for Community Health and Evaluation designs and evaluates health-related programs and initiatives throughout the United States.



CCHE's *Measuring What Matters* curriculum is informed by the following resources:

- [Centers for Disease Control and Prevention: A Framework for Program Evaluation and A Practitioner's Guide for Advancing Health Equity](#)
- [University of Wisconsin–Extension: Program Development and Evaluation](#)
- [Northwest Center for Public Health Practice: Data Collection for Program Evaluation \[online course\]](#)

Engage stakeholders template

Who are our evaluation stakeholders?	How might they be involved? What will they do?	What might they be interested in learning from the evaluation?	What do we need to do to get them involved and keep them engaged during the evaluation?
Example: Board members	Review and comment on the evaluation plan; assist with interpretation of evaluation results	How the program can be improved	Include the evaluation as a board meeting agenda item; identify a champion on the board to ensure involvement

Case study: *HealthConnect* completes the engage stakeholders template

Who are our evaluation stakeholders?	How might they be involved? What will they do?	What might they be interested in learning from the evaluation?	What do we need to do to <i>get them involved</i> and <i>keep them engaged</i> during the evaluation?
<p>Program team: Champions/leads from each key partner: community center, food bank, health department</p>	<ul style="list-style-type: none"> • Give feedback on evaluation design • Provide data (e.g., referral data) • Engage in interpreting the data & identifying ways to improve • Share findings and lessons learned 	<ul style="list-style-type: none"> • How the referral process is working in real time • How to use the findings to make the program work better • How successful the program has been 	<ul style="list-style-type: none"> • Set up initial meetings to design the evaluation and then a regular quarterly meeting (or add to program team meetings) • Set up a process to share information between meetings
<p>Community Health Worker (CHW)</p>	<ul style="list-style-type: none"> • Give feedback on evaluation design • Participate in the <i>program team</i> (paid time) • Help develop the data systems and collect data from clients (e.g. filling out key forms) • Help interpret the data and identify lessons learned • Recruit and/or interview clients to capture stories 	<ul style="list-style-type: none"> • How the referral process is working in real time • How to use the findings to make the program work better • Stories about client experiences and any changes in health behaviors or outcomes resulting from the program 	<ul style="list-style-type: none"> • Hold initial meetings where we ask what is important to them • Provide training and support around evaluation activities • Develop data systems that are useful for CHWs • Set up a process to share information in between meetings • Celebrate key accomplishments
<p>Participants served by the CHW program</p>	<ul style="list-style-type: none"> • Give feedback on evaluation design, e.g. areas of potential bias • Tell the story of program impact through interviews, e.g. understanding how satisfied they are and if the program makes a difference • Help interpret the data and identify areas for learning and improvement 	<ul style="list-style-type: none"> • What the program impact has been • How their insights have contributed to making program improvements 	<ul style="list-style-type: none"> • Ask how they would define success • Support them in completing program forms that capture key data • Schedule a meeting to review findings and identify potential improvements • Pay them for their participation and make participation easy (e.g., schedule meetings at times that work best for them)