



Social Impact Consultants

Discovering better ways
to solve social problems

Engaging Vulnerable Stakeholders in Developing Evaluation Questions

Presentation prepared for:



By

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Agenda

Assumptions

Review Framework

Discuss
Use/Adaptation

FSG Overview





- **Nonprofit consulting firm specializing in strategy, evaluation and research**, founded in 2000 as Foundation Strategy Group and celebrating 12 years of global social impact
- Partner with **foundations, corporations, nonprofits, and governments** to develop more effective solutions to the world's most challenging issues
 - Advised **over 400 clients** in every region of the world
 - Issue areas include **education & youth, global development, global health, US health, and vibrant communities**
- Recognized **thought leader in catalytic philanthropy, corporate shared value, collective impact, and evaluation**, with multiple articles published in *HBR*, *SSIR*, *Chronicle of Philanthropy*, *American Journal of Evaluation*, and *Foundation Review*
- Staff of **100 full-time professionals** with offices in Boston, Seattle, San Francisco, Washington, DC, Geneva, and Mumbai, India
 - **Passion and knowledge** to solve social problems
 - Combination of **on-the-ground experience and world-class consulting skills**


FSG Offers Strategic Guidance and Conducts Innovative Research for World-Renowned Foundations, Corporations, and Nonprofits

FSG Services

Deep expertise **advising over 400 clients on:**

 **Strategy:** FSG helps clients devise clear goals and implement effective strategies that apply resources to maximum potential

 **Evaluation:** FSG helps clients use evaluation in ways that facilitate organization and community learning, make strategic decisions, and take informed action

 **Research:** FSG is committed to advancing thinking and practice in the social sector through research, publications, and conferences that offer actionable insights

Sample Thought Leadership



Sample Client Organizations

Foundations:



Corporations:



Nonprofits:



What Do You Believe About Vulnerable Stakeholders?

Should use readily available resources to engage vulnerable persons

The voices of vulnerable persons has little relevance on evaluation practice



Should limit engagement of vulnerable persons at particular points

Should embed vulnerable persons in the evaluation planning process wherever relevant

While programs will vary it is important that you, as an evaluator, establish your beliefs about vulnerable persons' thoughts, ideas, and opinions

This Presentation is Based in the Philosophy That All Voices Matter and as Evaluators it is Our Role to Ensure that All Relevant Stakeholders are Effectively Engaged in Evaluation Processes

5 Steps for Engaging Stakeholders

Step 1: Prepare for stakeholder engagement

Step 2: Identify potential stakeholders

Step 3: Prioritize the list of stakeholders

Step 4: Consider potential stakeholders' motivations for participating

Step 5: Select stakeholder engagement strategy

This framework was designed to address any stakeholder group, for the purposes of this session we want to ask unique questions for implementing this with vulnerable populations

1. Prepare for Stakeholder Engagement

Traditional Lens: 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.

Vulnerable Populations Lens: You use a lens of exclusion when collecting information about the program. Asking “Who has been excluded and for what reasons in the design and implementation of this program?”

The offering of the “Vulnerable Populations” perspective throughout the presentation is not to insinuate that any vulnerable people group are different than any other people group, but is being proposed for the distinct purpose of recognizing historical and structural exclusion of certain persons in societies.

Step 2: Identify potential stakeholders

Traditional Lens: This step involves identifying all of the potential stakeholders whom you might engage in the evaluation question development process

Vulnerable Populations Lens: Who are your “vulnerable persons”?
What is considered “expertise” given your particular context?

1	Grantees	Advisory Boards	
	Program/Initiative Beneficiaries	Participants	
Clients			
Patients			

¹Taken from the Stakeholder Identification Worksheet p. 35 of the guide

Step 3: Prioritize the list of stakeholders

Traditional Lens: This step helps determine which stakeholders are most vital to the question development process.

Vulnerable Populations Lens: When using an approach to empowering and increasing involvement from vulnerable populations, these groups will always receive highest priority:
 “Vital to the evaluation’s success and resulting use of findings”

As an example in a substance abuse treatment program

	Advisory Boards	
Grantees		
Program/Initiative Beneficiaries	Participants	
	Clients	
	Patients	

Step 4: Consider potential stakeholders' motivations for participating

Traditional Lens: This step has you consider stakeholders' motivations for participating in the question development process. Knowing this will help you select an engagement strategy.

Vulnerable Populations Lens: Consider how motivations are identified or how can one create a proxy for motivation when working with vulnerable populations

This step is critical as the results will determine how you will engage the necessary and relevant stakeholders



Potential Challenge: In some unusually challenging populations (e.g., where there is severe mental illness, substance abuse, dual diagnosis) positive motivators (e.g., money) can be negative in consequence

5. Selecting a Stakeholder Engagement Strategy

Traditional & Vulnerable Populations Lenses: 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.

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

Now That the Stakeholders Have Been Identified the Strategies for Engagement Need to be Selected

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

Now That You Have Identified the Stakeholders and How to Engage Them, Here is a Planning Sheet to Help the Process Move Forward

<i>Program Phases</i>	Designing Program, Selecting Intervention Practices	Determining Program Goals	Setting Targets for Indicators)	Developing Strategies for Improvement	Implementation
	<i>Primary Focus of Discussion</i>			<i>Secondary Focus of Discussion</i>	
Who should we engage? ¹					
How should we engage them?					
Why do we intend to engage them? What is our goal?					
Does this approach change for <u>South Seattle v. South King County?</u>					

Discussion

Let's Talk About All That We've Seen Here:

- ***How can you use this?***
- ***What needs to be improved?***
- ***What is missing?***

All That We Have Discussed Here Today Can Be Found in the Document at www.fsg.org

ROBERT WOOD JOHNSON FOUNDATION EVALUATION SERIES

A Practical Guide for Engaging Stakeholders in Developing Evaluation Questions

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