Collaborating on Collaboration

Stakeholder engagement is abundant in evaluation. Each new evaluation brings about the questions of who to engage, when to engage, and how to engage. Along with these questions come contextual concerns like how to engage all relevant stakeholders in a culturally competent way while dealing with the complicated nature of power dynamics, maintaining objectivity, including underrepresented voices, etc. This session at the American Evaluation Association Conference used an appreciative inquiry framework to tackle these questions. While there were plenty of brilliant things discussed by attendees, this handout has some of the nuts and bolts from the evaluation literature on how best to engage stakeholders.

IN THIS HANDOUT...

Strategies for engaging stakeholders from evaluation theory

Specific activities for engaging stakeholders in different stages of the evaluation

Specific skills evaluators need to be competent at engaging stakeholders

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(Cousins & Whitmore, 1998; Greene, 2012; King, 2012; Mertens, 2007; Stake, 2003; Patton, 2012; Preskill, 2012)

Strategies

Shed your personal agenda and prior preferences
Don't come into the conversations with stakeholders advocating for any specific method/design/questions. You need to figure those out in collaboration with an identified group of primary users based on their needs, context, wants, etc.

Start creating a plan of engagement from the very beginning
In the planning stages of the evaluation, you should also be gaining information about who the potential pool of stakeholders may be, when to include them, and how best to engage them. This may take some investigative work since you will likely only have face time with your main stakeholder at the beginning.

Get them on board through shared goals and caring
We do this work because we care. The best way of getting others on board with the evaluation is to show them you are all working toward the same goal. Additionally, people have evaluation anxiety. It's important to have a warm, friendly demeanor and interpersonal effectiveness as you start to engage your stakeholders. Genuinely care about your stakeholders and they'll genuinely care about you too.

Keep them on board by building trust and mutual respect through responsiveness
Maintaining good stakeholder relationships takes more than interpersonal skills - it takes hard work, a humble spirit, and being responsive. Listen to what they have to say, incorporate their voice into the evaluation, and respond in a timely manner.

Working groups as a tool to sustain engagement and tap into stakeholders' intrinsic motivation
All stakeholders don't need to be involved in every step of the evaluation. Creating working groups helps disperse responsibility across stakeholders (less evaluation burnout) and lets stakeholders choose what they want to be a part of (driven by what they value/care most).

Incorporating evaluation training to enhance effectiveness
Training staff in the technical skills and considerations of evaluation helps build the capacity to better use data, understand how to contribute toward the evaluation effectively, and more critically think about their work. Evaluators need to take on the role of teacher in these instances.

Bring in the often-unheard voices
To fully understand the context and to ensure the evaluation is as sound and usable as possible, you must bring in the unheard voices (i.e., marginalized voices, devalued roles, quieter stakeholders, and naysayers). Be sensitive to barriers that may make it difficult for these voices to be hear (e.g., language, access to transportation or child care, meeting times, power dynamics, etc.).

Specific Activities

The following are a few suggestions for evaluators. Some are specific activities to do with stakeholders at key phases of the evaluation. Others are lenses to incorporate throughout the entire evaluation.

Appreciative Inquiry

Ask questions about peak experiences (major successes), what they value most about the topic of inquiry, and how future successes can be achieved.

Learning culture

Help build a culture of risk taking, trust, tolerance for failure, and curiosity through reflection, dialogue, asking questions, identifying and challenging values and assumptions, and seeking feedback.

Building rapport

Spend time onsite, conduct informal interviews with various stakeholders, adopt a volunteer role and do small tasks onsite, talk to community 'old-timers', show up at community gatherings.

Vision statement

Ask questions about the role of learning/evaluation in the organization, the value it brings, and how it can contribute to decision making.

Systems Map

Provide a flipchart to groups. Have them draw a map of the system in which their work lives (e.g., college readiness). Have them talk about what other orgs play a role in/work toward the same goals.

Fake findings

Guide users through fabricated findings to see if any design changes or additions to data collection could increase utility.

Empowerment

Have the group decide on what the mission is for the organization. Ask them to prioritize activities required to get there. Have them rate how well they're doing on each. Talk about low rated areas.

Self-study meetings

In groups, stakeholders look over new data, draw conclusions, and share out. Only rule is that you can't make a claim unless you have data to support it. Have them do this anytime there is new data to interpret.

Communicating Findings

Jointly develop a plan for communicating findings by answering who can learn from the evaluation, what the key messages of the eval are, and how will the intended audience best receive it?

Specific skills

Although this is not a comprehensive list of skills that would be useful in your quest to engage stakeholders effectively, these are pertinent ones to keep in mind.

Interpersonal skills

- Building relationships
- Facilitating groups
- Managing conflict
- Walking political tight ropes
- Being transparent with stakeholders
- Engage in ongoing communication with stakeholders

Facilitating evaluative thinking

- Making assumptions explicit
- Operationalizing program inputs, goals, and processes
- Valuing empirical evidence
- Promoting ongoing learning
- Separating statements of facts from interpretations and judgments

Self work

- Humility
- Tenacity
- Patience
- Love
- Flexibility
- Reflection

Culturally sensitive

- Being actively cognizant, understanding, and appreciative of the cultural context in which the evaluation takes place
- Articulating underlying motives for each step of the evaluative endeavor
- Using stakeholder-generated interpretive means to arrive at the results and further use of the findings

Qs to ask

Who is essential to engage to create buy-in and enhance collaboration (considering power dynamics and including a range of voices)?

How do we engage stakeholders in a way that is culturally competent, inclusive, and collaborative while remaining objective and unbiased?