MINI-GUIDE FOR

ENGAGEMENT EVALUATION

Evaluation can be a powerful tool to support community engagement. Tracking and understanding engagement can support your ability to increase internal and external capacity, influence policy, and secure funding. It is important to consider evaluation from the outset of your engagement planning and incorporate opportunities to evaluate throughout the lifespan of your engagement. You are likely already doing some sort of tracking, monitoring, or evaluation work, so this guide will help build upon that existing foundation.

The purpose of this mini-guide is to support your organization through the process of creating an evaluation plan, selecting evaluation activities, and sharing findings for your specific engagement. It is intended for engagement planners who are new to evaluation or who are looking to expand their evaluation abilities. This mini-guide will help you:

- Understand why evaluating engagement is important and how to advocate for allocating time and resources
- Create an evaluation plan that aligns with your engagement plan
- Implement evaluation activities that match your engagement purpose and organizational capacity

There is no singular approach to evaluation; instead evaluation is conducted based on an organization's capacity and in alignment with the project's purpose. This mini-guide draws from the vast world of program evaluation and tailors recommendations and resources to the context of engagement. The final section of the mini-guide provides some additional evaluation resources.

2.1 WHY EVALUATE?

Organizations conduct evaluation for a variety of reasons, including to understand the work they do and make strategic adjustments to their operations. "In 2016, nonprofits continue[d] to prioritize evaluation for the purpose of strengthening future work (95% of respondents identified it as a priority), learning whether objectives were achieved (94%), and learning about outcomes (91%)." (Innovation Network, Transforming for Social Change, 2016 State of Evaluation).

Evaluation is a powerful tool for making intentional and impactful adjustments to your work. It is also useful for understanding your team's capacity and ability to produce effective community engagement.

TIP: Evaluation can test a Theory of Change or Logic Model, generating insights about whether your efforts achieved the desired outcomes. These are simple and adaptable tools that can be used to plan your engagement or initiative. Check out this resource from What Works to help build a Theory of Change or Logic model.

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IN THIS SECTION

TIP: Evaluate for authentic engagement. Everyday Democracy has a great framework for defining indicators and measurement methods for authentic engagement.

IT IS NOT ALL ABOUT HOW MANY PEOPLE SHOW UP

Oftentimes, engagements are evaluated solely on attendance numbers which could be an inaccurate representation of success. Attendance could be one standard of evaluation, but should be supported by others that measure if the goals were reached, or if insights are usable.

DETERMINE THE EFFECTIVENESS AND IMPACT OF THE ENGAGEMENT

It is important to understand if your community engagement initiative was effective and why it was effective. As a tool to measure learning and impact, evaluation can provide clarity on what aspects of an engagement worked and which elements need improvement. Understanding what worked or didn't can be utilized to articulate needs and generate support for future engagement efforts.

The act of building an evaluation plan is an integral part of clarifying the purpose of the engagement. Before developing your plan, it is critical that you have identified the purpose, goals, outputs, and method of engagement, along with an assessment of the target audience. To develop an evaluation plan is to identify the reasoning behind evaluating the experience, or the objectives for evaluation. Community engagements are generally evaluated in order to improve the engagement process, hold organizations accountable, discern stakeholder reach/participation, and understand the effectiveness of the engagement.

Improve Operational Processes
Evaluation can help you understand your team's capacity and the effectiveness of your operational design. Understanding the success, struggles, and time and effort allocated to your engagement will help with project planning and management, as well as reporting outcomes. For example, a survey not only gathers important feedback about a program, but understanding how successfully you administered it to get the desired results (e.g. in-person versus email) will help you plan for the future. Ask yourself, "What were some successes and barriers to our community engagement approach?"

Examples of some of the many uses of evaluation activities include:

Building Accountability with Partners
Sharing evaluation outcomes with stakeholders and contributors supports transparency and accountability. Consistent and planned evaluation can encourage honest conversations among stakeholders by building in an appropriate space for giving and receiving feedback. When team members and stakeholders are aware of the evaluation process, they are more informed on how to contribute to the purpose. When possible, efforts should be taken to share data with the community, especially if they contributed to that data or if the results affect them.

TIP: In order to be transparent, inform partners at the start of your engagement that you are doing an evaluation, how the evaluation will be shared, and that you will report back on ways that changes will reflect their feedback.

Advocacy
Evaluation can be used to highlight or make the case for the importance of the engagement initiative. It can focus attention and clarify pathways for those with decision-making power. Evaluation results not only communicate the engagement strategy and value, but they can also be used to make the argument for future needs.

NEGATIVE RESULTS ARE JUST AS IMPORTANT AS POSITIVE RESULTS

When you frame negative results as a learning opportunity, or a call to action or improvement, you foster an atmosphere of transparency and buy-in from those you will need to make the necessary changes. Sometimes, negative evaluation can be more impactful in enacting organizational change than a positive result.

Oversight and Compliance
Having clear and measurable parameters for evaluation at the start of your engagement will build alignment among team members about what is to be achieved through your engagement effort. Using evaluation throughout the engagement, not just at the end, supports team members and stakeholders in knowing if they are meeting expectations. If an engagement initiative is off-track or not meeting expectations, utilize your evaluation plan to communicate or flag the issue with your stakeholders. Evaluating throughout an initiative will help your team understand why expectations were not met.

Capacity-Building
The evaluation process is an opportunity to build your team's and stakeholders' monitoring, evaluation, and learning (MEL) capacity. Check out this toolkit from MEASURE Evaluation for more information. By taking time to reflect on and discuss evaluation findings, your team can make more strategic decisions for upcoming projects and better understand how their work impacts the initiative outcomes.

Sustainability
Evaluation outcomes can be shared with funders and decision-makers to encourage them to invest in or replicate future engagements, expand programs, or take a policy position.

Building Awareness
Sharing evaluation results and asking stakeholders to participate in evaluation is an opportunity to re-engage or introduce the community to the initiative. Build community awareness and leverage more possible evaluation input by providing opportunities for stakeholders to hear about, reflect and discuss the results. This is an opportunity to have the community provide a check on you, ensuring the results reflect their experiences.

Knowledge-Building
Evaluation results can be used as a device to communicate what works. It can help funders and nonprofits discover the 'secret ingredients' of effective community engagement implementation. It can help uncover insights on what stakeholders are feeling and perceiving. Those insights can be used for future work for your organization or can help other organizations working with the same community.

Leveraging Community Support
Through the process of sharing and discussing evaluation results with stakeholders and community members, you can leverage community support. Showcase how your engagement efforts achieved a specific outcome or change and how supporting more efforts like this might further benefit the community. Be transparent with negative findings, as they are an opportunity for learning.

2.2 BUILDING EVALUATION

Determine Why You Are Evaluating
The act of building an evaluation plan is an integral part of clarifying the purpose of the engagement. Before developing your plan, it is critical that you identify why you are conducting an evaluation of your engagement. Perhaps you want to evaluate the impact of the engagement. Maybe you want to learn about where your engagement process could be improved. Maybe you want to learn about both. You can choose from the benefits of evaluating above to help you decide.

It is critical that you have identified the purpose, goals, outputs, and method of engagement, along with an assessment of the prioritized audience. To develop an evaluation plan is to identify the reasoning behind the experience and the objectives of the engagement.

Evaluating Outcomes: These metrics evaluate the effectiveness of your engagement in achieving your desired outcomes and should relate directly to the project goals developed in this Almanac's Purpose and Planning Tool. An example of outcome data might include changes in knowledge, attitudes, or understanding through surveying.

Evaluating Process: These evaluation metrics relate to the planning and implementation of the engagement itself. These objectives can be used to evaluate the effectiveness of your project management, guide program improvement, and assess whether a program was delivered as intended.

The type(s) of evaluation you chose to conduct should support why you are evaluating and what you hope to accomplish with your engagement. You may choose to evaluate participation, process, or a combination of both. As an example, if 'building staff capacity' is your evaluation goal, you may focus your effort primarily on a process evaluation. If your intention is to understand the impact of your initiative, you might focus your effort on impact evaluation, monitoring, or participation evaluation.

Determine Who is Involved
Determine early in your planning process who you need to involve for a successful evaluation. Your evaluation participants will include both the internal staff conducting the evaluation, as well as the stakeholders whose insights will be collected through the evaluation. Will you be interviewing people? Collecting demographic information? Asking people to fill out surveys? Anyone who will contribute to your evaluation outcomes should be engaged as early as possible in the planning process to generate buy-in, solicit feedback and assess risks, and build a pattern of accountability and transparency.

Determine What to Evaluate
There are endless ways to perform evaluation and even more things to evaluate. It is important to narrow your focus to avoid being overwhelmed by possibilities. In narrowing your evaluation focus, refer back to the Purpose and Planning Tool to identify where in your process you can improve.

The table below can be used to help you determine what you are evaluating by guiding you through different ways to evaluate and questions to ask yourself and your evaluation team.

TIP: Have an observer available in your virtual engagements. Observing participation in a virtual meeting can be especially challenging for facilitators, as they cannot easily see all individuals at once, or they may be focused on other technical needs. Having a dedicated observer can help to monitor chat, too.

EVALUATING OUTCOMES

WAYS TO EVALUATE	ASK YOURSELF:
Demographics Understand the population(s) you're engaging	• Do you want to track who you reached? Why? • What information do you want to know about the people you reach? • How does understanding who you reach help you understand the impact of your engagement or initiative?
Participation Understand the experience of participants in your engagement	• How does tracking the participation support your engagement or initiative? • What could the tone or engagement level of participants tell you about the success of an initiative?
Accuracy and Utility Determine the validity of research or data collected and the usability of that data	• How does the data and insights collected support your engagement, program, or initiative? • Were the methods for data collection hindered by bias? How might bias impact the accuracy of our data? • How can you ensure data collected is reliable and valid?
Short-Term Impact Understand immediate effects of engagement or initiative	• What are your short term goals for this initiative? • How does collecting insights help you determine if you've met these goals? • What are the changes in stakeholder perceptions, awareness, or knowledge?
Mid-Term / Long-Term Impact Track longer term effects of an engagement through surveys, observations, data collection, and potentially additional engagements.	• What are your long term goals for this initiative? • How does collecting insight help you see if you've met these goals? • What can evaluation tell you about the success of the initiative? Its barriers? • What needs to be improved and how? • What are the changes in awareness or knowledge of an issue, community behavior, policy, or community capacity?

EVALUATING PROCESS

TYPES OF EVALUATION	ASK YOURSELF:
Project Management Assess components related to project management and strategy used throughout the engagement process-- from planning to follow-up	• How does tracking your project management support leading this initiative again? • How does tracking your project management support reporting this initiative to management? Or the public? • How will you ensure your engagement has met inclusive and equitable requirements? • How can evaluation clarify if your strategy was successful in reaching the intended audience?
Team Capacity Assess your team's ability to work together and accomplish tasks	• How could tracking your team performance, collaboration, and service deliverable support your organization? • How can evaluation clarify if your services were delivered as planned and implemented with a high quality? • How does tracking team capacity support the understanding of your team member's performance and the effectiveness of your collaboration?
Resource Use Assess how efficiently resources were used	• How might tracking your budget be helpful to understand the effectiveness of your initiative? • How does tracking support the understanding of the usefulness of engagement materials (e.g. printed handouts, table activity materials, or virtual tools)? • How can evaluation clarify if the location or virtual platform of the engagement was valuable and/or accessible?

LEVERAGING WHAT YOU ALREADY DO

You do not have to build an evaluation plan from scratch. Leveraging your existing process to be more robust and work specifically for your needs can save you time, money, and frustration!

Get More From Your Registration Process

- Use a tool for engagement registration (e.g. Eventbrite, Google Forms, etc.) to help track the number of participants, follow up and further engage them, and learn more about them.
- Add a survey question, or set of questions, to your registration form. You can make this anonymous, or you can make it a required step.

Take Opportunities to Reflect

- Use the notes from your post-engagement meeting
- in your evaluation. Make those meetings more formal, structured, and repeated.
- Keep track of stakeholder feedback! It can be used as testimonials or quotes in an evaluation report.
- When your team or stakeholders are reflecting on your engagement initiative, take notes to use in evaluation. Take notes of any changes you made during the process to showcase learning.

Record Observations

- Research does NOT have to be formal. Observe what is happening during your engagement initiative (e.g. the overall tone of the event, how engaged participants are, or if they stay for the entire time).
- As you get more comfortable with what observations work for your evaluation, build out a more structured process.

Build in Surveys

- Create short, post-engagement surveys to distribute to participants that include evaluation questions.

Catalog Draft Materials and Utilize Meeting Notes

- Keep drafts of all engagement materials, including promotional content, agendas, presentations, and speaker notes. If you made changes to these documents so they better serve the engagement initiative, those changes are a reflection of your learning.
- Showcase how your work evolved over time to be more responsive to community needs. Articulate these changes through evaluation reporting; those lessons learned can be utilized for future work.

Utilize Reports

- Monitoring, whether its attendance tracking, taking meeting notes, or pulling reports from your web or social media presence, can be key to your evaluation reporting.

Utilize Check-in Meetings

- Check-in meetings with your team, partners, or stakeholders are a great opportunity to fold in evaluation informally by simply keeping meeting notes or more formally by asking a series of questions or facilitating a reflection and analysis conversation.

2.3 CATALOG OF IDEAS FOR COLLECTING DATA

Below is a table of common data collection methods and additional ideas. Each method has its advantages and disadvantages in regards to the amount of time required, the reliability of the data, and the resources you will need to deploy. When choosing a data collection method, ensure it gets at the *why* you are evaluating. Data collection, as part of overall engagement, should be determined by scope, objectives, resources, time, expertise, and other internal/external factors.

TALKING TO PEOPLE	SOLICITING WRITTEN RESPONSES	REVIEWING DOCUMENTATION	OBSERVING IN REAL-TIME
• Interviews • Story circles • Oral histories • Focus groups • Public forums / community engagement events	• Surveys & questionnaires • Polls	• Census data • Reports • News articles • Previous survey results • City records • City data & maps • Data from community partners	• Observe & document participants at events • Map assets & stakeholders • Site visits • Field observational studies

DATA COLLECTION METHODS

Stakeholder Surveys & Questionnaires
Surveys can be built in a number of ways to glean both qualitative and quantitative data. They can be used repeatedly over time to show longitudinal impact or can be used at the end of the event to gather immediate feedback.

Polls
Polls can be a very quick way to receive a large amount of data on a specific topic. They can be used as 'temperature checks' to gauge energy level or understanding and can be used at the start of a program to find out demographic information or at the end to understand sentiment. If your team does not have the capacity for a robust evaluation plan, polls are a great way to showcase stakeholder perceptions quickly.

Observation
Observations about the engagement beyond attendance numbers might include the level of participation or enthusiasm, tone, openness in communication, community trust, etc. It is important to identify what you are observing first, and then create a definition or rubric to measure your observations.

Interviews
Similar to surveys, interviews can be built in a variety of ways to collect both qualitative and quantitative data. An interviewer can pre-create a set of questions or simply practice 'free listening.'

RESOURCES

Stakeholder Surveys & Questionnaires:
- Best Practices for Surveys
- Writing Survey Questions
- Question-Wording Tips
- How to Write Great Survey

Polls:
- The Beginner's Guide To Creating Effective Polls

Observation:
- Ethnography in Evaluation
- Observation in Evaluation
- Qualitative Research & Evaluation Methods
- Data Collection Methods for Program Evaluation: Observation

Interviews:
- Evaluation Interview Guide (doc)
- Data Collection Methods for Program Evaluation: Interviews
- Better Evaluation: Interviews

MORE DATA COLLECTION METHODS

Testimonials
Use an interview to get a testimonial about the project from a stakeholder or partner. You can ask participants to generally share their experience, or give a more structured format.

Monitoring Systems, Logs, Activity Forms, & Registries
These are project management tools used throughout the engagement process that you can refer back to for evaluation. Track attendance over time, monitor how resources were utilized, assess the effectiveness of your process, etc. Alternatively you can track activity forms or meeting agendas to evaluate how staff worked through the engagement process.

Peer Evaluations
Peer evaluations can offer significant insight into your process and impact, as team members are the most familiar with the type of work you are doing. Peer evaluations can also be used for team members to give feedback on one another and the process.

Documentary
Documenting your engagement through video, photos, recordings, or written observations (like journals) can help tell the story of success. While it can be difficult to identify what you will measure beforehand through documentation, analyzing it afterwards can help bolster evaluation data or illustrate gaps and challenges.

Debrief Sessions
These sessions are an important part of improving an engagement's process and impact. They should be completed shortly after the engagement and conducted either formally, with a set agenda, or informally, as a discussion.
Debriefing should always be done with the key planning team and partners, but it can also be completed with key participants in the engagement to understand their perceptions of the process.

Participatory Analysis
Involve stakeholders in the design and decision-making in regards to the evaluation plan. This helps program planners better understand what the stakeholders found valuable and/or impactful about the experience.

Focus Groups
These facilitated and structured group interviews can be used to collect information about a shared group experience. These can be used to support participatory analysis or when individual interviews are not practical.

Story Circles / Oral Histories
These facilitated and structured group interviews ask participants to share their experiences to be used to create case studies or comments in a report.

Information from Community Partners
Share data that community partners may be collecting for their own evaluation, tracking, and monitoring. See if they're willing to add an additional set of evaluation metrics, or if, in return, you can do a specific part of the evaluation and share the results. Leverage this shared work to benefit both of you.

News Articles
External media published about your engagement can be used in reports or presentations and to showcase your reach and impact. **TIP**: Track the number of views or downloads you get to help understand the greater community's interest in your engagement topic.

POLLS, QUESTIONNAIRES, AND SURVEYS

As stakeholders are already on a computer or phone, they can quickly complete the questions in real time. Use these tools to not only measure stakeholder engagement and feedback, but to collect demographic or other important tracking information.

CENSUS DATA / PRIOR SURVEY RESULTS / CITY RECORDS, DATA, & MAPS

Information already created by venerated institutions can help establish a baseline in your evaluation to bolster data sets or create a comparative study. This information can also help in your planning of an engagement - ensuring that your understanding of the target audience and their perceptions are in alignment.

ASSET MAPS / STAKEHOLDER MAPS

Building these types of maps can help you understand participants' perceptions of their needs and their built environment. You can use them at the beginning of an engagement process as your baseline, or you can use them throughout to showcase changes in perception. **TIP**: These maps are visually interesting! They are great to add to reports and presentations.

2.4 BEST PRACTICES FOR UTILIZING EVALUATION

A significant aspect of evaluating an engagement is identifying the ways in which your evaluation will be utilized and by whom. Before collecting the data even begins, a plan should be made on who is responsible for collecting, analyzing, reporting, and presenting the results. These next steps take time and effort, and it is important to ensure your team has the capacity to deliver the desired evaluation results.

Remember that the evaluation format that best fits the needs of your internal and external stakeholders requires an assessment of what data will actually be used. Good evaluation involves a feedback loop.

TOP EVALUATION USES

- Report to the Board of Directors
- Report to funders
- Plan and revise program initiatives
- Plan and revise general strategies
- Report to stakeholders
- Make allocation decisions
- Advocate for a cause
- Share findings with peers

SOURCE: Innovation Network, Transforming for Social Change, 2016 State of Evaluation

METHOD OF SHARING	CONTENT TO SHARE	BENEFIT TO THE AUDIENCE	
		Stakeholders	Internal Team / Organization
Follow-Up Emails **TIP**: Consider what you have promised to provide, and be sure to include it in the email.	• Acknowledgments and thanks • Short summary of outcomes, including photos • Next steps and opportunities for continued participation	T A KB	A KB
Website / Blog Post	• Your approach and process • Photos and 'light' data • Summary of your progress or high-level experience outcomes • Ways to get involved	T A KB	KB
Social Media	• Process highlights (photography, quotations, 'light' data, visuals) • Logistical information about timeline and next steps • Ways to get involved or learn more	T A KB	KB
Case Studies **TIP**: If public-facing, this is a great tool for transparency, and, if internal, it can help focus on process.	• Your approach and process, photos, and 'light' data • Summary of your progress or high-level experience outcomes • Ways to get involved	T A KB	KB
Shareable One-Pager	• High-level topics • Process highlights (photography, quotations, 'light' data, visuals) • Summary of quantitative and qualitative outcomes • Acknowledgment of those involved	T A KB	KB

T TRANSPARENCY A ADVOCACY KB KNOWLEDGE BUILDING

METHOD OF SHARING	CONTENT TO SHARE	BENEFIT TO THE AUDIENCE	
		Stakeholders	Internal Team / Organization
Stories & Participant Anecdotes	• Value of the engagement • Intangible aspects of an engagement	T A KB	A KB
Presentations **TIP:** Presentations can be oral, but a best practice is to have visual aids.	• Data directly presented to viewers • Key findings, in a visual and captivating way	T A KB	T KB
Reports **TIP:** Refer to this checklist on effective reports from the CDC.	• The process and methodology • Details from the engagement • An analysis of the outcomes and data	T A KB	T KB
Data Visualization	• Structured presentation of complex or intangible information • Observer's understanding • Graphs, charts, research walls, journey maps, personal profiles, or infographics	T A KB	T KB

T TRANSPARENCY A ADVOCACY KB KNOWLEDGE BUILDING

IMPLICATIONS FOR THEORY, PRACTICE, OR POLICY FROM YOUR EVALUATION FINDINGS

Sometimes your evaluation findings could have implications on a theory, practice, or policy. Knowing this early on can help you plan how the findings will be communicated, by whom, and when. Such planning is crucial to ensure the findings are shared properly - not taken out of context, exaggerated or dismissed. Here are some questions to guide your approach:

- How interactive should the communication be for each of the intended audiences? (e.g. Written and print materials are least interactive, while discussions and working sessions are most interactive. Verbal and video presentations fall somewhere in the middle.)
- What are the risks in sharing the findings that could affect the strategy, initiative, program, organization, or the community you serve?
- Can the findings be taken out of context and harm the effort, organization, or community?
- What can you do to mitigate the risks and consequences?
- What roles do you, your staff, your board members, and your internal or external evaluator(s) have in summarizing and communicating the findings and insights?
- Who would be the most effective messenger of the information?
- Do you need a facilitator skilled in adult learning techniques to assist with discussions, working sessions, and verbal presentations?
- Should you provide training for the messengers as spokespersons for the media and other types of inquiries?

Excerpted from W. K. Kellogg Foundation Step-by-Step Guide to Evaluation: How to Become Savvy Evaluation Consumers, *2017. (p. 68)*

2.5 CHECKLIST FOR EVALUATION

Identifying what you are evaluating

- ☐ Have we identified our objectives (stakeholder, participation and process)?
- ☐ Have we identified our measurable indicators?
- ☐ Have we referred back to the Purpose and Planning Tool to identify where we can improve in our process?

Methods for collecting data

- ☐ Have we identified quantitative and qualitative methods?
- ☐ Have we identified who on the team is responsible for data collection?
- ☐ Are we prioritizing data collection that will be reported out?

Sharing your results

- ☐ Have we identified who we plan to share the results with and why?
- ☐ Have we identified what exactly is important to share?

SOURCES

The following resources provide an assortment of frameworks, research, toolkits, and materials to support the development of evaluation for your community engagements. Learn more about the principles of evaluation and ways to design meaningful and impactful evaluation for your initiatives.

Americans for the Arts. Arts and Social Impact Explorer.

Center for Disease Control, Criteria for Selection of High-Performing Indicators: A Checklist to Inform Monitoring and Evaluation.

Centers for Disease Control and Prevention. Framework for Program Evaluation in Public Health.

Centers for Disease Control and Prevention. Program Evaluation and Evaluating Community Engagement.

Everyday Democracy. An Evaluation Guide for Community Engagement.

Governance and Social Development Resource Center. Quantitative and Qualitative Methods in Impact Evaluation and Measuring Results.

W. K. Kellogg Foundation. Step-by-Step Guide to Evaluation: How to Become Savvy Evaluation Consumers.

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