

The FERA Stakeholder Evaluation Design Process

Q: What is a stakeholder-focused evaluation, and why is it important?

FERA's stakeholder-focused approach to evaluation is a response to a well-documented organizational fact: the people who need solutions are the most interested in looking at the problems and are the most able to solve them. FERA's user-focused approach begins by identifying the individuals who need evaluation information and who have information that the evaluators need to design an evaluation. We designate them as the "Stakeholders" in the evaluation effort. The "stakeholder" group often includes individuals who have operational responsibilities for the program, individuals who have strategic knowledge of the programs' long-range goals and individuals who receive the services of the program.

FERA's evaluation model helps the stakeholders to clarify what information they need, as well as why they need it, and results in designing the best process to collect, analyze and report the kind of information which can be best utilized by the stakeholders. It is FERA's experience that engaging those people who have an investment in the outcome will enhance the quality of the evaluation and increase the likelihood that the results of the evaluation will be used. In a stakeholder-focused approach, the evaluation process is a collaborative effort between the stakeholders and the evaluators.

A collaborative evaluation in which the stakeholders are identified and directly involved in the design phase of the evaluation ensures that:

- ◆ The central questions, the information the stakeholders most want to know, will be addressed;
- ◆ The stakeholders will establish a sense of ownership in the evaluation process and in the results, increasing the likelihood that the results will be used; and
- ◆ The stakeholders' level of interest in the resulting analysis will remain high throughout the process, and a partnership will be created among the people serving different functions in an organization.

The stakeholder design process has other benefits as well. A shared language and sense of purpose and direction are developed, while both the potential and limitations of evaluations are established. This helps to establish realistic expectations for what can be accomplished. Also the design phase is significant because it builds consensus and trust among various stakeholders who have different perspectives on the program and its evaluation.

Q: How do we proceed to design an evaluation?

The purpose of the design phase is to collect information from the stakeholders which is useful in planning the evaluation. The first step of the design process is identifying the stakeholders. Once the stakeholders have been identified, the design process can take many forms. One highly useful and efficient form is the Design Workshop described below. The design phase results in a detailed evaluation plan.

Q: What is a Design Workshop?

The primary purposes of the workshop are to clarify evaluation needs and develop information useful in planning the evaluation. FERA convenes the designated stakeholders, usually 6 to 12 people, in a workshop setting to: 1) explore the potential and limitations of evaluation; 2) gather relevant information about the organization or program to be evaluated; 3) identify the key evaluation questions and information sources; 4) establish priorities among the questions; 5) identify reporting needs; and 6) build a common evaluation language. The workshop usually lasts between two and four hours.

To facilitate the design process, FERA has developed an inventory of materials and exercises that help clients focus on how they can best benefit from an evaluation effort. FERA evaluators are skilled group leaders and interviewers who make the design process come alive and work effectively.

FERA has adapted the format and purposed of this basic design workshop in many ways. For example, the stakeholders can be divided into two or more groups or they can be interviewed individually. The process can be used to establish, reaffirm, or clarify program objectives and to build consensus about program priorities. Success indicators for measuring program effectiveness can be developed, and organizational characteristics affecting the evaluation can be identified.

Q: What is the product of the design process?

The material developed from the workshop is converted into an evaluation plan. The plan includes: 1) a clear description of the objectives of the evaluation and /or of the program or project to be evaluated; 2) the key evaluation questions; 3) the data sources necessary to answer the questions; 4) the data collection and analysis methods; 5) the reporting process and products; 6) a schedule; and 7) a budget and payment schedule. This plan can easily be converted into a contractual document for services to be rendered and payments to be received.