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Monitoring & Evaluation

Monitoring & evaluation in context

context

Monitoring and evaluation are important across all public engagement activities. *Monitoring* is the process of tracking progress in the achievement of a program's objectives. *Evaluation* is the systematic assessment of that progress,or lack thereof, in relation to goals. Investing in monitoring and evaluation is a crucial component in determining whether the desired social change is taking place, and adjusting practices accordingly.

Monitoring and evaluation for public engagement is important for four complementary reasons:

1. to make progress in achieving our desired outcomes;
2. to improve our programming as public engagement practitioners;
3. to ensure we are communicating our work effectively with our network and stakeholders; and
4. to justify the need for ongoing public engagement funding to donors.

In the Inter-Council Network's 2012 focus groups and interviews with public engagement practitioners across Canada, *measuring the effectiveness of public engagement* was identified as one of the top five peer learning priorities. However, monitoring and evaluation in public engagement can be very challenging. These challenges were a common theme in this Knowledge Hub and across public engagement practitioners and organizations.

As a result, the goal of this Knowledge Hub was to articulate and share good practices to address these challenges. As a group, we articulated a number of challenges and gaps related to monitoring and evaluation in public engagement, including:

- the tendency to report only to donors, basing our monitoring and evaluation around donor requirements, instead of program or organizational objectives. This tension can also be articulated as evaluation for donors versus evaluation for learning and stakeholder engagement.
- a lack of human and financial resources for monitoring and evaluation – another symptom of evaluation for donors versus evaluation for learning and stakeholder engagement. If monitoring and evaluation is primarily valued to fulfill donor needs, the commitment of time and resources will be lacking to measure the internal outcomes for long term organizational needs for public engagement learning. These internal outcomes will involve collection and analysis of qualitative data (i.e. participant reporting on how their behaviour has changed), often requiring a greater investment of time and resources than a donor's quantitative data requests (i.e. number of participants).
- diversity in types of public engagement has led to a large diversity of tools, and there is not one central place for these tools. Further, there is a lack of knowledge on what tools and methods are good (or not) and rigorous (or not).
- public engagement is challenging to measure. It is often not quantifiable, and attributing causality to changes in knowledge and behaviour is not easy. Combined with unspecified engagement targets such as "the general public" and a focus on short-term public engagement campaigns, measuring the results of public engagement can be difficult.

The context in which monitoring and evaluation for public engagement takes place is one in which the very definition of public engagement seems to be fluid and different between places and times (Webber 2012). Importantly, this toolkit has articulated a new definition of public engagement that captures the current context of public engagement in Canada:

> *Public engagement is the practice of inspiring, supporting and challenging people and groups in dynamic cycles of learning, reflection and action on global issues. Public engagement is a transformative process that works towards more equitable social, economic, environmental and political structures.*

Finally, the Istanbul Principles are an important guide for public engagement and for monitoring and evaluation. The principles relate to personal, relational, and societal change and therefore apply to all levels of public engagement. There is no one prescription that can ensure your organization's monitoring and evaluation activities will be perfect, but keeping the spirit of the Istanbul Principles of "empowering people" front and centre in planning and implementing your monitoring and evaluation plan is an excellent start.

Develop a theory of change

good practices

> *"Public engagement activities often include events or one-time workshops with Canadians. How can we evaluate the*

impacts of these smaller engagements and ensure that they are contributing to our vision? Placing these activities in the context of an explicit and thoughtful theory of change illuminates their role in the profound social change that we are working towards. It can be very empowering to see all of your organization's activities connected in this way."

-Communications Specialist for a large NGO

Has your organization talked about:

- Where you are in terms of public engagement?
- Where you are going?
- How you will get there?

Because of the breadth of public engagement activities in which organizations are engaged, articulating your desired outcomes and the actions required to achieve them is crucial to evaluating the success of your activities. A "theory of change" can be a very useful tool for clarifying these processes.

Developing a theory of change takes time. You can dedicate time and resources to it over a specific, defined time period and then revisit it periodically, or you can develop it in an evolving, ongoing process. Rest assured, however, that there are always ways to discuss theories of change and to do good evaluation, even with limited resources. The key is to be clear about what you want to achieve, and set realistic, measurable objectives that are meaningful to the change you are aiming for.

Clearly articulate your vision, goals and desired outcomes

good practices

Do's:

- Seek out tools to clarify your organization's belief in how change happens, such as those found in the "How Change Happens" section of this site. These tools allow you to approach change in a strategic and thoughtful way while considering the qualitative and quantitative measures you might use in your monitoring and evaluation efforts. Some examples of commonly used tools include the theory of change, the pyramid of engagement, outcome mapping and the logic model. These tools will help you to find the best means of achieving the changes you seek.
- Consider your public engagement activities and how you evaluate them as part of an overall development program.
- Approach your beliefs about change for public engagement in Canada with the same two-way engagement that characterizes work with Southern partners. Public engagement in Canada should have the same reference points as international work, such as values of solidarity, anti-oppressive practice and equity. Ask yourself: How do you conduct and measure public engagement in your work with partners? Do you measure changes in behaviour or attitude? Can you look at your public engagement work in Canada with the same lens?
- Ask yourself the following questions:

    What level(s) of change are you working with (personal, relational and/or societal)?

    What are your assumptions related to these desired changes?

    What would you like the outcomes to be?

    What is your organization or activity's role in this outcome?

    Where do you fit in the big picture?What are all the conditions you need to reach in order to be able to achieve your organization's vision?

    What actions do you need your audience to take to achieve your desired outcomes?

    How will you measure those actions? The progress towards your outcomes?

Don'ts:

- Don't base your actions solely on assumptions or intuition.
- Avoid looking at only one part of the process; use a holistic approach and take the time to articulate your whole vision.
- Don't keep your theory of change hidden. It can be a powerful tool to inform and engage your target audience and others.
- Don't simply apply someone else's theory of change to your work. While the Theory of Change for Public Engagement provides an excellent entry point, your organization's activities and initiatives will benefit from their own tailored theory of change. If your organization does not have a theory of change, start the discussion to develop one for your organization. In the meantime, you could refer to the broader Theory of Change for Public Engagement module of this toolkit.

Practitioner's perspectives:

"In 2012, my organization went through a process of determining how we believe change happens. This process involved gathering input from the majority of our staff over several months. With the help of outside consultants we

mapped out the conditions we need to reach, the actions that we encourage specific audiences to take, and our current campaigns and how those all reinforce our vision. The result of the exercise allows us to be clear on our organizational theories of change."

-Public engagement specialist for a large NGO

"As part of a new public engagement program, we were working with a consultant to help us develop our monitoring and evaluation system. To start the process off, the consultants took us through a Theory of Change workshop. The workshop helped us to clearly articulate who our target audiences are, what changes we are hoping to bring about, and how we think the changes will happen. The session was very useful to help us think these things through and come to a common understanding as a team. We were then able to design a practical, useful monitoring and evaluation system around our theory of change."

- Communications specialist for a large NGO

Involve a variety of stakeholders in articulating your beliefs about change

good practices

Do's:

- Involve a variety of people, including staff, participants (members of your target audience), volunteers, alumni and others in your visioning work. The participants and alumni have directly experienced the change processes that you believe in; they can give you a very good perspective on your organization's beliefs about change.
- Use multiple methods of involvement in order to involve multiple stakeholders in your visioning. Participatory methods are especially powerful in engaging participants in discussions about change. Focus groups could help, as well as individual phone calls or an online survey sent to participants. Make sure to involve both men and women in the discussion and address the specificities of public engagement and change for both sexes.

Don'ts:

- Don't discuss your beliefs about change only in a small closed group or with just your public engagement team. Your beliefs will become clearer as you share and discuss them with a variety of perspectives from different stakeholders. Wider stakeholder engagement also tests your internal perspective with your external target audience.

Know your target audience's current level of engagement

good practices

Do's:

- Ask yourself: Who are your public engagement activities targeting? At what point are they on your engagement continuum? Consider the agenda of your target audience. What changes or progress do you want to see from them? For instance, do you want the youth involved to move from receiving your emails to actually participating in your events, or even to organize events themselves? Return to your theory of change and the original project design and adjust accordingly.
- Close the loop with your participants and others by reporting evaluation back to them.

Don'ts:

- Don't assume each of your audiences should be engaged in the same way. Your previous reflection on your theory of change will help identify at what point each of your target audiences are and how to maintain that engagement or move them along the engagement continuum.

Practitioner perspective:

"We realized that to be able to monitor and evaluate people's level of commitment, and their change in commitment over time, we needed to decipher the different levels at which people can engage with our work. The exercise began with determining our audience, the actions they take, and sketching it out within a six-level pyramid framework. We later changed the pyramid framework into an engagement spectrum."

–Public engagement specialist for a large NGO

Be a learning organization

good practices

Do’s:

- Make sure to occasionally revise your theory of change (or the other model you chose to work with) to adapt to unexpected results. Even though it is important to have a clear direction for what you hope to achieve, practice might bring you to realize that you need to further adapt those goals. Be critical, reflective and flexible to improve your model. This is called “double-loop learning”, in which organizations “critically examine our assumptions and our theories in light of the results”, going beyond changes to programs and activities.
- Take time to reflect after each public engagement activity. You can reflect on: What was supposed to happen? What did happen? Why? Include your lessons learned in an internal report, so future employees can learn from your experience instead of making the same mistakes or starting all over again. After each of your public engagement activities, take some time to reflect on what worked, what unexpected results can be incorporated in future, and what should be improved. Reporting is about learning to improve, not only about reporting to donors.

Don’ts:

- Don’t modify your theory of change on a frequent basis. Your theory of change can be dynamic, but it is still a foundational document that shouldn’t be changed without careful consideration. Changing it will have impacts down the line – on your methodologies and therefore your data, which can make it harder for statistical analysis and data comparison.
- Don’t believe there is “no time” for reflection or that you can “do it later.” If you do not take the time to reflect after each activity, your team will end up losing more time by making the same mistakes with new activities, and the quality of your public engagement evaluation data will suffer from it.

Practitioner perspective:

> *“Through our public engagement campaign to raise awareness among Canadian teachers, students, and union members about global issues, we had some unexpected and unintended positive results, which we discovered through our regular monitoring activities. One of our Canadian partners spontaneously initiated the formation of a permanent international solidarity fund, funded directly from its own members. This is something that occurred as a direct result of our engagement on international development issues, but was not one of our anticipated outcomes or part of our theory of change. We learned from this and adapted our approach, and are now including the formation of an international fund as a possible “step” in the engagement ladder which we encourage.”*
>
> – Program Director for a small NGO
>
> *“At our planning stage, we elaborated two logic models: One for the desired poverty reduction changes in the field, and one for the desired behaviour changes (public engagement) to support poverty reduction from Canada. Even though complementary, the two logic models have been used and implemented separately with separate approaches. The regular monitoring of our results helped us realize that the Canadian and overseas logic models would benefit from being more integrated to better show how public engagement concretely supports international development initiatives beyond Canadians’ current targeted attitude or behaviour changes. This is the next step for us.”*
>
> -Public engagement specialist for a large NGO

Reflection questions for developing a theory of change

tools

It is vitally important to start your evaluation with three basic questions about your organization and activities as a whole:

1. Where are you at?
2. Where are you going?
3. How will you get there?

In articulating your vision of change, you should be able to answer:

- How do you conduct and measure public engagement in your field work or partnerships? Do you measure changes in behaviour or attitude? Can you look at your public engagement work in Canada with the same lens?
- At what level or levels does your organization direct its public engagement work in Canada (personal/relational/societal)?
- How would you like to see change happen at these different levels?
- How does this change contribute to your broader organization/project mission? (e.g. How is your engagement moving a youth from an observer to a contributor?)
- Is your organization already using a theory of change or another tool to articulate and measure change?
- If your organization already has a theory of change or other strategic planning document, who was involved in articulating the change your organization wants to see? Was it a small team? Was it done through a broad consultation? Did key stakeholders from your target audience take part in the discussion to validate/invalidate your organization’s vision?
- If your organization doesn’t have a theory of change or other strategic planning document, what tool would be most useful in helping your organization to articulate the change you want to see and the best means of getting there?
- How will your monitoring and evaluation reference your theory of change? How will your theory of change be adjusted in

future as a result of your monitoring and evaluation?
- How open is your organization to being a learning organization? Is it willing to give enough value to monitoring and evaluation to support the learning process in all public engagement activities (ex. by allowing time after each activity to re-analyze data and reflect on their validity and contribution to change)?

Embed monitoring & evaluation in each stage of your public engagement plan

good practices

Organisations should have a clear understanding of why they are conducting evaluations. The question of why should be asked particularly in the planning stages of your public engagement campaign. Ask yourself: What do you hope to learn from the evaluation? How you will use the information? Keep in mind the spirit of the Istanbul Principles, which insist on an evaluation that empowers people and demonstrates multiple accountability.

The following questions will help to determine the indicators, processes, tools and overall approach to use in your evaluation:

- What do you want to know? (i.e. What is the change you hope your public engagement work will achieve? How is it affecting women and men?)
- How will you know it? (i.e. Which indicators will give you the information you want?)
- Where can this information be obtained? (i.e. What are your data sources?)
- How and when will this information be collected? (i.e. What tools and methods will be used to collect data? What resources are required?)
- How will you maintain rigour in your data collection and data reporting? (i.e. Are your methods and processes replicable? Is your data reliable and valid? Do your methods align with the specific scale of change you are working towards? Have you identified variables and considered external forces that impact your results?)
- How will you use this information? (i.e. program improvement, reporting to participants, donors or internal stakeholders, etc.)
- How can you engage your participants meaningfully and respectfully throughout the process?

Define the scope of your activities

good practices

Do's:

- Ensure evaluation and monitoring and its indicators are relevant to the objectives and outcomes of the specific public engagement initiative. Consider the elements that your organization wants to measure, including factors such as diversity or gender equality.
- Make indicators and tools appropriate to the change that you can realistically expect to see. Have indicators for width, depth, and height (for an explanation of those concepts, see “Towards good practice in public engagement”).
- Ensure indicators and tools are realistically measurable and manageable based on the resources you have available (both human and financial).
- Verify that indicators and tools are applicable to, and implementable in, the context in which your public engagement activities are taking place.
- Establish a reference point or baseline at the design phase, and monitor progress throughout the process. In some cases, baseline data may not have been collected or may not be possible given the available resources. Depending on the type of change you want to measure, you can use other techniques such as a retrospective “post-then-pre” question design to measure change over time.
- Use a diverse set of indicators and methods, including qualitative and quantitative measures (a mixed method approach). Using a complementary suite of indicators is more important than any single indicator alone. At a doctor’s office, for example, one’s blood pressure alone may not reveal much, but when considered in concert with family history, cholesterol levels, weight, etc., a more complete picture can emerge. This practice is called "triangulation" or "cross examination" in social sciences.

Identify your target audience

good practices

Do's:

- Be clear as to who your audience is and whether they are online or offline. In order to measure the impact of your public engagement activities, it is necessary to have direct knowledge of and access to your audience. Different methods of interaction will also require different approaches and different definitions of “target audience.”
- Adopt a participatory approach as much as possible, and engage your stakeholders at all stages in the monitoring and

evaluation process. Make your evaluation fun and empowering for participants. Close the loop with your participants by reporting back to them on your findings.

Don'ts:

- Do not use broad audience targets, such as 'the general public' or 'Canadians'. Measuring the engagement, knowledge, interests or behaviour changes of all Canadians is likely not realistic for your organization. This would need to be done through public polling. Instead, use existing research to situate your public engagement activities in the broader Canadian context; this will help your public engagement be credible and realistic, and will allow you to show more efficiently the impact of your activities in your reports.

Practitioners' perspectives:

> *"In 2011, we received funding for a two-year project to engage youth on issues related to gender as well as to train volunteers as peer educators. One of the first steps that we undertook was to meet with an external evaluator to develop a comprehensive evaluation plan. In these initial planning stages, we identified our different participants – volunteer peer educators, workshop participants, community mentors, teachers and others – and identified the different outcomes and objectives that the project would lead to for each of them.*
>
> *Once we had articulated and documented the targets, outcomes and objectives, we were able to create the evaluation tools that we needed to monitor the project's success in engaging these different audiences along the way. In the end, we developed short surveys for workshop participants and teachers, an interview guide for mentors, and a series of surveys, focus groups, and arts-based tools for the volunteer peer educators (the most engaged participants in the project).*
>
> *By having these discussions early on in the project and recognizing that we had different audiences for different activities, we were able to prepare the evaluation tools that we needed and were ready to hit the ground running regarding evaluation as soon as we started on the different project activities. Importantly, while this project had some funding dedicated to working with an external evaluator, we extensively documented our experiences working with her and used those lessons (e.g., starting early, developing diverse tools for diverse audiences, ensuring strong baseline data, etc.) and adapted those tools for other projects where we were not able to support an external evaluator."*
>
> - Project Coordinator for a small NGO

Evaluate your evaluation regularly

good practices

Do's:

- Commit to midterm evaluations at a minimum to ensure that the correct indicators and methods are being used. A midterm evaluation also allows you to incorporate new learning for the remainder of your public engagement campaign or project.
- Consider iterative evaluation (ongoing evaluation which incorporates feedback in a cycle of learning, adjustment, monitoring, and evaluating during the project). Building on the point above, iterative evaluation would have several moments identified in the life of your public engagement project to incorporate lessons learned. Iterative evaluation is of great value in creating a responsive public engagement program and a learning culture in the organization.
- Ensure that your evaluation methods can be replicated and scaled up.

Don'ts:

- Do not wait until the end of your project to conduct your evaluation, or the accuracy and credibility of the data and reporting will suffer. Your data will be less meaningful and less exact. Also, you might not have used the right indicators nor the right methods to efficiently measure your impact, thereby distorting your data. You will also have missed many opportunities for learning and improvement throughout the project.
- Don't collect data that is not meaningful or useful. If an audience is witness to pointless data collection, it can lead to disengagement or apathy. Be careful and mindful about why and when you collect data. Ask yourself: What are you promising people in return? What is the benefit for participants? Be transparent about what the data will be used for.

Practitioner's perspectives:

> *"There is pressure to have quantitative results and quantitative indicators, such as number of pamphlets that we handed out or the number of participants that came to the workshop, as these things are easy and cheap to count. There are definitely funders who want to take that approach; this is challenging, as sometimes the indicators that are easy to get are not the ones that are really meaningful."*
>
> -Monitoring & Evaluation Specialist

Reflection questions on monitoring & evaluation

tools

1. What are the three most important things that you want to get out of your monitoring and evaluation? Keep these in mind as you design your system, and throughout your project so that you don't lose track of what is most important to you.
2. How can you ensure your data collection and monitoring and evaluation activities are respectful of your participants?
3. Given that monitoring and evaluation data is often used to justify funding projects and programmes, how are your monitoring and evaluation activities making space for negative feedback?
4. Are the voices of participants being reflected in real changes to your programs?

Ensure your whole organization supports and benefits from monitoring and evaluation

good practices

The organizational context within which monitoring and evaluation for public engagement are conducted has an impact on the evaluation process and outcomes. Evaluation is valuable not only as a tool for responding to funders (i.e. funder-directed or mandated evaluation), but also as a way for the organization to reflect on and learn from its work internally and to determine if long-term goals and outcomes are being met. It is critical that monitoring and evaluation activities are properly resourced and supported, including both financial and human resources as well as attention from the organization's leadership.

Consider these questions:

- How does your organization view monitoring and evaluation? As a valuable tool from which you can learn? As a means of measuring your progress towards long-term change through public engagement? Or as strictly a funding requirement? Do you do it for yourselves? Or for others' sake?
- Who is accountable for monitoring and evaluation in your organization? Is there buy-in on the importance of monitoring and evaluation from all levels of the organization? How is that exhibited?
- How does the organization plan to learn from its monitoring and evaluation?

Do's:

- Promote multiple accountability: Monitoring and evaluation activities should answer questions that are important to the organization and participants, as well as those identified by funders. It is helpful if there is an overall organizational plan or approach to monitoring and evaluation in place (i.e. one flowing from the organization's theory of change).
- As a learning organization, all relevant stakeholders (e.g. leadership, staff, project participants, funders, etc.) should be engaged as appropriate throughout the stages of monitoring and evaluation (planning, implementation, reporting). Stakeholders can then identify important evaluation questions (both for the specific public engagement project and for the organization as a whole) and ensure buy-in and support for monitoring and evaluation. When identifying stakeholders to engage in this process, be sure to consider the needs of participants using a gender/anti-oppressive lens.
- It may also be helpful to take a longer-term view than just the timeline of a public engagement project when evaluating outcomes for the organization as a whole.
- If the outcomes are unexpected or not positive, be sure to include a learning component to the evaluation for internal growth and development.

Don'ts:

- Too often, monitoring and evaluation are driven by the requirements of project funders. Organizations get stuck in the often-limited boxes provided by funders, causing a silo effect in their organizations and a missed opportunity for learning. While accountability to funders is an important function of monitoring and evaluation, ensuring accountability is only one of its many functions.

Practitioners' perspectives:

> *"We feel, and are, really accountable to the funders. So if they want the numbers of participants, that's sometimes all they're interested in seeing. One meeting with one funder was quite shocking, where we were basically told in no uncertain terms that the unintended results that we thought were amazing - they fundamentally altered how we were doing some things - were of no interest to them. As they pass these results up the line, the only thing that starts to matter is how many people attended this workshop and how many volunteers there were. This was difficult to hear, since we didn't see that as having as much of an impact. It is disempowering in terms of the work that we do, if it is reduced to just those numbers."*
>
> -Project Coordinator for a small NGO

Ensure that sufficient resources are available to support monitoring and evaluation activities

good practices

Do’s:

- Keep the organization’s resources in mind in the planning phase, such as people, money and time. When identifying your indicators and data sources, consider the resources required to actually collect and report on the data. Be mindful of the resources needed to implement evaluation at several points in a project, including mid-term and final.
- Remember that monitoring and evaluation is an ongoing process for your organization’s learning, as well as measuring the organization’s steps towards long-term goals. Considering how monitoring and evaluation extends beyond the life of a particular project (long-term impact) is also important in your resource allocation.
- Delineate roles for staff and volunteers in conducting monitoring and evaluation. Identify who will be responsible for data collection, analysis, reporting, etc. and allocate time for staff/volunteers accordingly. Someone needs to be in charge of evaluation to ensure that all the necessary pieces of work are happening. This lead person must also be able to count on the help of other key team members. These responsibilities should be made clear from the beginning, in the planning phase of a public engagement project, and should be valued by the organization as a whole on an ongoing basis.

Don’ts:

- Don’t underestimate the time and resources required to conduct your monitoring and evaluation activities. If you don’t plan realistically, the quantity and quality of your data will suffer.
- Don’t leave the responsibility for conducting monitoring and evaluation unassigned. Something that is everyone’s job can sometimes become no one’s job.
- Don’t give up on evaluation because you think the knowledge or resources aren’t available to carry it out.

Practitioners’ perspectives:

> *"I have been involved in evaluations with budgets ranging from under $1,000 to the hundreds of thousands. An evaluation with a smaller budget is not necessarily less valuable, but it does often require organizations to be very focused and specific about what they want to measure and how they can best measure it given the resources available. For example, rather than conducting a large-scale survey of all public engagement program participants, the organization may choose to do a smaller-scale focus group with a few participants to gather participant feedback."*
>
> - Monitoring & Evaluation Specialist
>
> *“At the planning stage of each public engagement activity, we identify who is in charge of the coordination of the activity, and who will support this person. Together, the group agrees on the objectives, target audience, deadlines, evaluation methods and responsibilities. The Coordinator writes all of it in a Terms of Reference document for the activity, which becomes the reference document for all the people involved. He/she is in charge of making sure the activity is organized according to what has initially been decided, supporting the team members with what they need (often with reminders), and writing the final report, including compiling the evaluation data provided by everyone. This process works very well for us and ensures that nothing is left out.”*
>
> -Communications Specialist for a large NGO

Take a long-term view when monitoring and evaluating public engagement

good practices

Do’s:

- Ensure that program participants are aware of the long-term nature of evaluation initiatives, and engaged accordingly. Collect and maintain contact information early in the project, so that you will be able to reach out to participants to evaluate longer-term changes to behaviours, attitudes, etc.
- Be consistent with the timing and frequency of long-term evaluation (i.e. will you do evaluation on a quarterly or yearly basis?). The timing of your evaluation can have an impact on the results.

Don’ts:

- Don’t reinvent the wheel for each of your public engagement activities. Learn from what worked or what needed improvement in past activities. Refer to your own experience, to the experience of people in your organization, to activity reports, etc.

Use an anti-oppressive lens in designing your monitoring and evaluation

good practices

Do’s:

- Disaggregate data to capture relevant information for your organization and its values. In addition, try to understand the values that are most important for your programs, networks and funders; make sure these values are measured, so you can report on them.
- Evaluate your public engagement activity, as well as your outcomes, through an anti-oppressive lens. Ask yourself if the public engagement activity itself was inclusive and accessible. Was it designed in such a way as to be inclusive of, and actively promote the participation of, a diverse group of participants? Refer to the “Gender Checklist” (link below) to help you find gender-aware indicators.

Don’ts:

- Don’t assume that disaggregating the data is sufficient in assessing your programs through an anti-oppressive lens. Instead, disaggregated data should be seen as a necessary, though not sufficient, first step in evaluation.

Practitioners’ perspectives:

> *“All of our facilitation and leadership training sessions begin with an introduction to anti-oppressive practice. This happens before we introduce participants to public engagement topics and activities. We consider it to be a foundational piece without which effective public engagement simply could not take place.*
> *We work with community partners to offer this training. Quite often, in post-facilitation training feedback forms, participants note that their introduction to anti-oppressive practice was the most valuable part of the training weekend. For our youth facilitators, this is often new information that they are keen to hear about and reflect upon.”*
>
> –Project Coordinator for a small NGO

Reflection questions for ensuring your whole organization supports and benefits from monitoring and evaluation

tools

The following questions can be helpful in ensuring that everyone in your organization supports and benefits from monitoring and evaluation:

1. How does your organization currently approach monitoring and evaluation activities? Are monitoring and evaluation activities integrated or project-specific? Are they linked to an overarching organizational theory of change?
2. How could your organization apply the Istanbul Principles in your monitoring and evaluation work?
3. What resources are available to support monitoring and evaluation for public engagement within your organization? Externally?
4. How could you help your organization build a stronger culture of learning that values monitoring and evaluation activities?

Participatory, dialogue-based evaluation

case studies

By Vince Terstappen, Project & Operations Coordinator for Check Your Head: The Youth Global Education Network

For a project to train youth as peer educators, we experimented with several participatory, dialogue-based evaluation methods that yielded great results. The impact of this approach was twofold. First, it created powerful opportunities for participants to share, take ownership of the project, and engage with one another, strengthening their relationships. Second, it created a great deal of very interesting, unexpected, and useful evaluation data that we incorporated into reports to participants, members, and funders. Two particularly interesting approaches were used.

First, after participants completed an online survey with a number of quantitative and qualitative questions about actions they had taken in the community, we created a visual representation of the information in aggregate. We ‘closed the loop’ by presenting this visual to the participants during a gathering and supported them as they facilitated a dialogue on what it meant to be part of an active and engaged community.

When the online surveys were considered in isolation, the participants may not have felt that their impact was substantial; however, when seen as one part of a larger movement, the actions appeared much larger. In post-evaluations, several participants noted that one of the biggest things that they took away from the project was knowing that they are part of a community of like-minded youth.

Secondly, as a closing exercise after a year of training and engagement activities, participants were able to give feedback to one another anonymously. For this, 15 participants stood in a circle with their eyes closed. One participant was selected to step outside of the circle, open their eyes, and think of one person who inspired them over the last year. They walked to that person, tapped them on the shoulder, and silently returned to their spot in the circle, closing their eyes. The person who was tapped could then open their eyes and was asked to anonymously tap someone who taught them something and then return to their spot. This process continued with a number of questions about different contributions made by participants until everyone had been anonymously tapped a few times.

Participants remarked later that they really enjoyed this evaluation exercise, that they were caught off-guard (in a good way!) by the reasons they were tapped, and that it created a sense of community. It was a great way to 'close the loop' with participants, to report back to them in a participatory and creative way, and to have them take a leading role in providing feedback to one another and, as a result, to the organization and the project evaluation.

Additional resources on monitoring & evaluation

resources

Note that many of these resources are not focused on public engagement, but are intended as helpful tools for public engagement practitioners to adapt for their own projects and programs.

1. Better Evaluation Website
An international collaboration to improve evaluation practice and theory by sharing information about options (methods or tools) and approaches

2. Integrated Monitoring: A Practical Manual for Organisations That Want to Achieve Results
A user-friendly guide to monitoring and evaluation for non-profits. Note - there are several language variations to choose from on this webpage.

3. Review of Best Practices in Public Engagement Measurement
Research pulled together by One World Inc. consultants in the summer of 2012 for Aga Khan Foundation Canada.

4. Approaches to Measuring: Community Change Indicators
Assembled by Tamarack – An Institute for Community Engagement, 2010. The measurement summaries and annotated lists in this document act as a starting point for exploring different measurement approaches. These approaches can also aid in developing further conversations about measurement tools and techniques employed by organizations that measure community change efforts.

5. Retrospective "post-then-pre" question design
A useful technique for measuring change over time.

6. A primer to developmental evaluation
Developmental evaluation applies to an ongoing process of innovation in which both the path and the destination are evolving. Includes a checklist for assessing who makes a good evaluator and the skills they should have (pages 37-45).

7. Project Evaluation Guide for Nonprofit Organizations
An excellent guide developed by Imagine Canada to assist non-profits "to conduct precise and appropriate project evaluations, and then communicate and use the results effectively." While not focused specifically on public engagement, the guide takes one through the language, tools, and steps of evaluation.

Additional resources on organizational support for monitoring & evaluation

resources

1. Toward Good Practice in Public Engagement
CCIC's excellent document on participatory evaluation in public engagement. See pages 13-16 on organizational readiness and enabling environment.

2. Project Evaluation Guide for Nonprofit Organizations
An excellent resource developed by Imagine Canada to support non-profits "to conduct precise and appropriate project evaluations, and then communicate and use the results effectively." See pages 20 to 22 in particular for organizational support

information.

Additional resources on models of change

resources

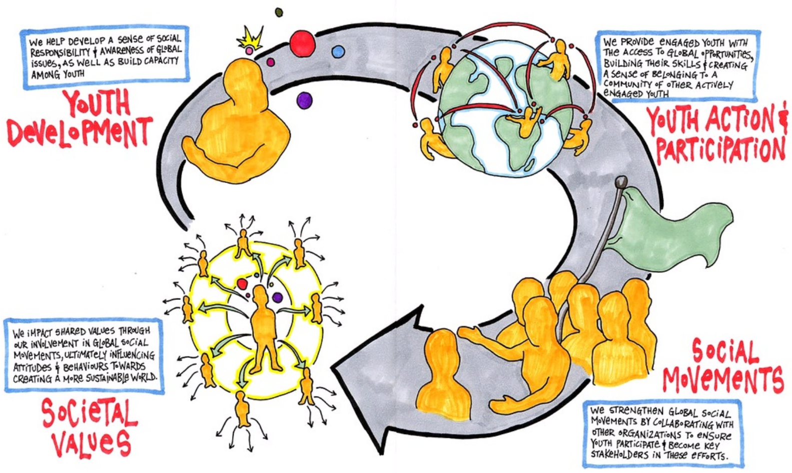
These four tools present models of change that your organization can use to clarify your belief in how change happens – the first major step in effective public engagement.

1. Theory of Change

> *"For many, a theory of change is a road map that shows the linkages between an organization's goals and its strategies, activities and outcomes."*
>
> - CIC, 2009. "Toward good practice in Public Engagement. A participatory evaluation guide for CSOs", p.17.

Resources:

- The Berkana Institute's theory of change is a good example.
- INTRAC describes the importance of a Theory of Change in M&E and how to develop it
- TakingITGlobal describes their theory of change



Caption: TakingITGlobal's Theory of Change 2010

2. Pyramid of Engagement:

> *"The Engagement Pyramid is an integrated approach to spanning engagement in both the electronic world and the real world. Organizations can use it as a way to think more holistically about the range of engagement strategies and tactics they have at their disposal. It also provides a framework for matching these opportunities with those constituents most likely to succeed in carrying them out."*
>
> -Gideon Rosenblatt, "The Engagement Pyramid"

Resources:

- This pyramid of engagement was developed by Groundwire, a non-profit consulting firm focused on the environmental

  sector. It is a popular one for public engagement:

Source for image: www.toolsforchange.net

This short video from Surfrider Foundation explains how the Pyramid of Engagement can be applied:

- Grist.org's ladder of engagement is four simplified stages.

3. Outcome Mapping:

> *"...the focus of outcome mapping is on people and organizations. The originality of the methodology is its shift away from assessing the products of a program (e.g., policy relevance, poverty alleviation, reduced conflict) to focus on changes in behaviours, relationships, actions, and/or activities of the people and organizations with whom a development program works directly."*
>
> –Outcome Mapping: Those Who Dream Make a Difference

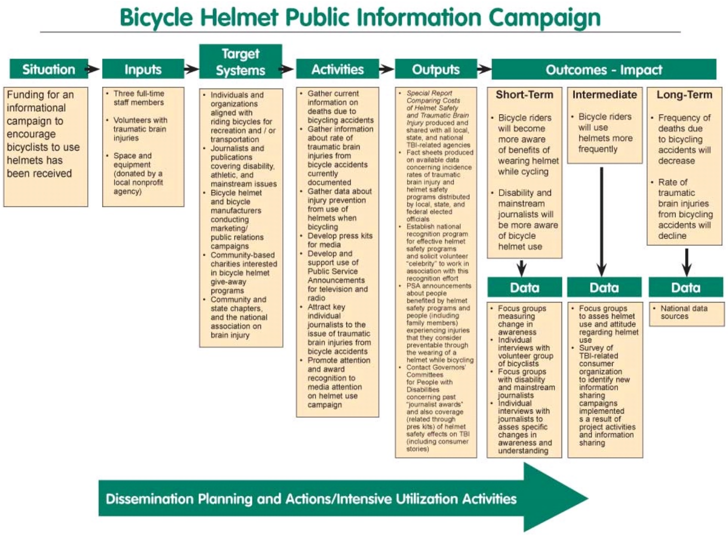
- Introduction to Outcome Mapping
- Use of Outcome Mapping by Jamaican Self Help & CCIC, 2009: "Toward good practice in Public Engagement. A participatory evaluation guide for CSOs.", p.18.

4. Logic Model

> *"A logic model presents a picture of how your effort or initiative is supposed to work. It explains why your strategy is a good solution to the problem at hand. Effective logic models make an explicit, often visual, statement of the activities that will bring about change and the results you expect to see for the community and its people. A logic model keeps participants in the effort moving in the same direction by providing a common language and point of reference."*
>
> –Developing a Logic Model or Theory of Change, The Community Tool Box

Resources:

- Bicycle Helmet Public Information Campaign (Logic model for a bicycle helmet public information campaign, courtesy RUSH Project)



- Developing a Logic Model or a Theory of Change ([The Community Tool Box](#)):
- [Ten logic model examples](#)

Monitoring & evaluation checklist

tools

This tool is for preparing and reviewing your monitoring and evaluation of public engagement.

The three overarching good practices below are intended as an all-encompassing approach to the monitoring and measurement of your organization's public engagement strategy. While every checklist point stands as its own toolkit module, they are each only one intrinsic part of this whole monitoring and evaluation system.

This checklist tool is offered as a summary document that can help you and your organization determine where the gaps are in your current practice of evaluating and monitoring public engagement.

A. Develop a theory of change

- Clearly articulate your vision, goals and desired outcomes
- Involve a variety of stakeholders in articulating your beliefs about change
- Know your target audience's current level of engagement
- Be a learning organization
- Use the reflection questions for developing a theory of change

Notes:

B. Embed monitoring & evaluation in each stage of your public engagement plan

- Define the scope of your activities
- Identify your target audience
- Evaluate your evaluation regularly
- Use the reflection questions for embedding monitoring & evaluation

Notes:

C. Ensure your whole organization supports and benefits from monitoring & evaluation

- Ensure that sufficient resources are available to support monitoring &
- evaluation
- Take a long-term view when monitoring & evaluating public engagement
- Use an anti-oppressive lens in designing your monitoring & evaluation
- Use the reflection questions for ensuring organizational support and benefit

Notes: