Case study example:
The *Health Connect* Stakeholder Engagement Plan

The *Health Connect* program team started by brainstorming who their stakeholders might be and how they would be involved. Once they had completed a draft of the template, they were ready to bring everyone together for a conversation and finalize their plan.

Who are our evaluation stakeholders?	How might they be involved? What will they do?	What might they be interested in learning from the evaluation?	What do we need to do to get them involved and keep them engaged during the evaluation?
Program team: Leads from partner organizations: food bank, community center, community clinic	• How is the referral process is working in real time? • Are vulnerable populations are being reached? • Is the program improving health behaviors and outcomes?	• Give feedback on evaluation design • Provide data (e.g., referral data) • Provide insights about the data • Identify ways to improve, including links between their organizations • Share findings and lessons learned	• Set up initial meetings to design the evaluation and then a quarterly meeting (or piggy back on existing program team meetings) • Set up communication (e.g., email, online portal, etc.) to share important information in between meetings
Community Health Workers (CHW)	• How is the referral process is working in real time? • How can we improve the program? • Stories of client experience and if their clients are experiencing changes in health behaviors or outcomes	• Give feedback on evaluation design • Participate in the program team (paid time) • Help develop the data systems and lead on data collection with clients (i.e., filling out key forms) • Engage in interpreting the data and identifying lessons learned • Recruit clients for the evaluation • Interview clients to capture stories	• Hold initial engagement meetings and ask what's most important to them • Provide training/support on evaluation activities • Develop data systems that work for CHWs • Set up communication (e.g., email, online portal, etc.) to share important information in between meetings Celebrate key accomplishments
Clients served by the CHW program	• What program improvements can be made? • Is client feedback being used to improve the program?	• Give feedback on evaluation design • Help tell the story of the program • Describe level of satisfaction with services and individual outcomes • Engage in interpreting the data and identifying areas for learning and improvement	• Provide background on the project and goals and ask how they would define success • Support clients in completing any forms that capture key data. • Interview them to capture stories. • Schedule a meeting to review findings and ask them to help interpret data and identify potential improvements • Pay them for their participation and schedule it to reduce burden of participation
Other social service organizations receiving CHW referral	• Is the program improving health behaviors and outcomes? • What program improvements can be made to strengthen services for shared clients?	• Develop a method for them to track and report data • Gather data from their organizations • Engage in interpreting the data and identifying areas for learning and improvement	• Hold initial engagement meetings and ask how they would define success • Engage early to learn what data is needed to understand progress • Share learnings and findings with these stakeholders and discuss potential opportunities for improvement and alignment