Mapping your KT evaluation stakeholders

This document provides tips about how to identify and prioritise who to involve when evaluating your knowledge translation (KT) activities.

Why involve stakeholders in evaluation?

Identifying your audiences is an important part of knowledge translation. Thinking about your audiences and other **stakeholders** (people with an interest in your evaluation) is also important when you plan how to evaluate your knowledge translation work.

Knowing what your stakeholders want to find out and how they will use the evaluation will help you decide what questions to ask, which methods to use and how to share the findings.

You might have already thought about your stakeholders when planning your KT activity. It's also a good idea to spend a bit of time thinking about anyone who might have an interest in whether your KT work makes a difference. Stakeholders might include:

- people **doing KT** in Cochrane – they'll be interested in whether what they're doing is making a difference and how to keep improving
- **audiences** affected by the KT activity – they might want to be involved in planning the best methods to use and helping you consider what to do with the results
- people who you want to **use the evaluation** such as your Cochrane Group or funders – find out what people want to know so you can collect the best information and present it in a useful way
- people who will **help** with the evaluation – they might give advice about what is practical for them to do or what resources you might need

Stakeholders are important throughout an evaluation. They can help to describe the KT activity and what you want to achieve, make sure the evaluation focuses on the most important questions and help you reach key audience members and decision-makers. They can also help with one of the most important elements of evaluation: making sure that the evaluation results are used to help plan for the future and improve KT work.

Involving stakeholders when you plan your evaluation will help you:

- bring people along on the evaluation journey with you
- benefit from a range of different ideas and perspectives
- focus on the things that matter most to those who will use the evaluation findings
- identify challenges at the start, including identifying people who may not support your evaluation

Stakeholders can have different levels of involvement in your evaluation and at different times. For example, you may want to work with a group of stakeholders at the start to help develop your evaluation questions and data collection methods. Or you might have individual conversations with some stakeholders to hear what they would like to achieve from the evaluation. You might formally report to some stakeholders at the end of the evaluation, so they can help use and spread the results.

When you are planning your evaluation, you should:

- explicitly think about which stakeholders you will involve and when
- target your key stakeholders to discuss or participate in evaluation activities regularly. **Stakeholders are more likely to support the evaluation and act on the results and recommendations if they have been involved in the evaluation process**.

So how do you identify who to prioritize? There are some simple steps for mapping your stakeholders.

Steps in mapping your stakeholders

Mapping your KT evaluation stakeholders can be broken down into four steps:

1. Identifying: listing relevant groups, organizations, and people

2. Categorizing: understanding your stakeholders' views and interests

3. Visualizing: thinking about how stakeholders relate to your objectives and to other stakeholders

4. Prioritizing: ranking the importance or relevance of stakeholders to involve in your evaluation

The process of mapping your stakeholders is as important as the end result. This will help you think through who you need to involve a lot in planning, who you just need to keep informed, and who you don't need to involve too much.

You don't have to write down all the steps or spend a lot of time. Just use a structured approach to think about who you should include when planning and discussing your evaluation.

Step 1: Identify your KT evaluation stakeholders

Brainstorm a list of people who might be interested in your KT evaluation under the headings of:

- people who work in KT
- audience members
- funders
- evaluation helpers

Where possible, identify people by name.

There may not be an existing list of stakeholders or a 'perfect' list. You will probably keep adding to your stakeholder list as the evaluation progresses.

Example: In 2019-2020 Cochrane tested online KT mentoring, where someone more experienced in KT gave advice to another Cochrane member working on a KT project. We wanted to evaluate whether online KT mentoring was worthwhile.

When we planned our evaluation, we thought about who the stakeholders for the evaluation might be. We used a simple table and inserted people's names.

People who developed the KT mentoring programme	- Cochrane Learning Team - Cochrane Knowledge Translation Department - University helpers
Audience for the KT mentoring programme	- People who volunteered to be mentors - People who volunteered to be mentees - Members of the Cochrane community who might decide to be mentors or mentees in future
Funders	Cochrane Senior Management Team (would decide whether to do this again)
Evaluation helpers	Independent researchers to help collect evaluation feedback

Step 2: Categorize your KT evaluation stakeholders

You might come up with a long list of possible stakeholders for your evaluation. Think about how you can group them to better understand what they might want from the evaluation and how important they are at different stages of the evaluation. For example, some stakeholders might have a lot of influence at the beginning, putting you in touch with audience members or helpers. Others might be more important at the end, when you want to share what you've learnt and planning next steps. Try to categorize whether your stakeholders have high or low influence/importance and high or low interest/involvement in your evaluation.

You could use a table like the one below to think about each stakeholder group.

Stakeholder type	Potential contribution	Involvement / interest	Influence / importance	Risks
KT producer, audience member, sponsor or evaluation helper	Do they have information, advice or skills that could help?	Rate as high, medium or low: How willing are they to engage with the evaluation process? How easy will it be to have them involved?	Rate as high, medium or low: Does the stakeholder have influence on people or groups that are important to you? Will they be able to influence next steps?	Could they impact negatively on the evaluation if they are not involved?

Example: Here are a few examples from our KT mentoring programme.

Stakeholder type	Potential contribution	Involvement / interest	Influence	Risks
People who created the KT mentoring programme	They can provide materials for the evaluation and make introductions to the people participating so important to involve them	**High**: They want to know whether KT mentoring is worthwhile, so they will probably want to be involved	**High**: They have high influence because if they don't agree with an evaluation method it won't get done	People who created a programme may not be open to hearing improvements so reporting would need to be sensitive to their feelings
People participating as mentors and mentees	They will be asked to provide evaluation feedback. They could test out possible survey questions to make sure the language is easy to understand	**Low**: People agreed to provide evaluation feedback when as part of the programme, but everyone is very busy	**Medium**: If they choose not to provide feedback, the evaluation wouldn't include much information	People might have a negative experience of KT mentoring if they are asked to spend too much time on evaluation
Cochrane Senior Management Team	Might be able to allocate someone from the central team to help plan the evaluation or analyze data	**Low**: Very busy with lots of other priorities. Probably can't be very involved in evaluation	**High:** They decide on what will happen as a result of the evaluation	If the evaluation doesn't give senior managers what they need, they won't be able to decide whether to fund KT mentoring in future

Step 3: Visualize your KT evaluation stakeholders

It can help to map your stakeholders visually so you can decide which people or groups it is most important to engage with. Mapping helps you compare different types of stakeholders.

Draw a graph with two axes. One axis is for how much influence the stakeholders have and the other axis is for how interested or involved in the evaluation they might be. Put stakeholder names or types into the quadrants.

Any stakeholders who have high influence and high interest /involvement would go in the top right-hand quadrant. These are the stakeholders that you would want to involve most in your evaluation planning and progress.

Stakeholders who have low influence and who have little interest or willingness to be involved are in the bottom left hand corner. You might monitor them and give them updates, but they probably wouldn't be your highest priority to engage with.
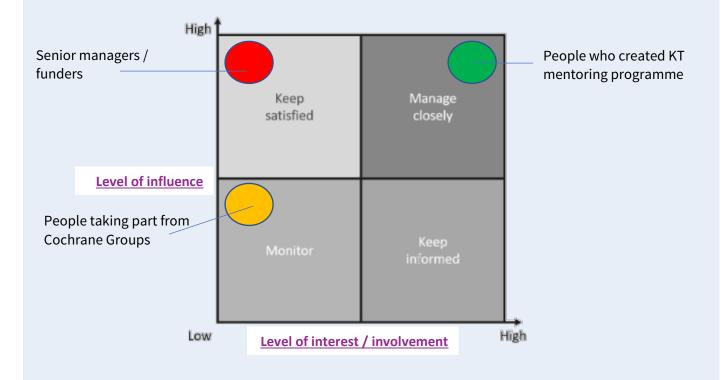
You can even draw circles of different colours to represent how positive a stakeholder might be towards your KT evaluation. Use green to represent positive, red to represent negative and orange to mean neither positive or negative.

Example: In our KT mentoring example, we had:

- People who created mentoring programme = high interest and high influence
- People participating in the programme = low interest and medium influence
- Senior Management Team = low interest and high influence

We've mapped them on the graph below.

As a hypothetical example, we are pretending that senior managers might be 'negative' towards the evaluation, perhaps because they think it might take too much time or money so we've coloured that circle in red.

Step 4: Prioritize your KT evaluation stakeholders

You can use your mapping to plan how to involve your stakeholders throughout the evaluation. Think about any ways you could engage with, produce with and share your evaluation with your main stakeholders. Include these approaches in your **Evaluation Plan**.

Consider:
- What emotional or financial interest do stakeholders have in your evaluation. Is it positive or negative?
- What motivates stakeholders most?
- What information do they want from you and how would they prefer to receive it?
- If they are not likely to be positive about the evaluation is there anything that will encourage them to support you?
- If people are opposed, how will you manage this? Who else might be influenced by their opinions?

Who to involve
- Keep informed the people who do not have much interest in being involved, but don't spend a lot of time trying to engage with them unless they have a lot of influence over what will happen during or after the evaluation.
- Make sure to keep people involved if they have a large interest in the evaluation and can influence what happens during or after the evaluation.
- If a stakeholder might have negative feelings towards the evaluation, you could prioritize trying to engage with them if they have a lot of influence.

Don't only focus on stakeholders who are positive and supportive of your evaluation. Engage with people who might not value your KT work or might not support your evaluation yet. Your 'critics' can help to identify problems with your KT work and evaluation plans, and that can help you strengthen your evaluation approach. Talking to people who are critical can help you understand their views and reasons too.

What to ask stakeholders
It is a good idea to set up time to speak with stakeholders individually or in a group. You might ask your stakeholders questions like:

- What is important to you about this KT activity / programme?
- What would you like this KT activity to achieve?
- How much progress would you expect to have made by now?
- What questions would you like the evaluation to answer?
- How will you use the results of the evaluation?
- What resources might you be able to contribute to the evaluation, such as time, evaluation expertise, access to participants, access to decision-makers, tools or funds.

When to involve stakeholders
Don't just think about your stakeholders after your evaluation is finished, when you want to share the findings. Think about them right at the start to help handle any evaluation issues and to make sure you collect information that will be most useful when your stakeholders are making decisions.