



Stretch2Engage evaluation toolkit

Brief guide to monitoring and evaluating service engagement initiatives

Stretch2Engage provides a powerful framework that organisations can use to strengthen their engagement capacity and practice. This guide provides assistance and simple tools to help organisations monitor and evaluate their engagement initiatives, and to keep them focused and effective.

This article was written by Lirata Consulting and draws on thinking from the Evaluation of the Stretch2Engage Framework Pilot in 2019. The evaluation was commissioned by Queensland Mental Health Commission (QMHC) and was undertaken in partnership with Queensland Network of Alcohol and Other Drug Agencies, Queensland Alliance for Mental Health and Enlightened Consultants.

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The Stretch2Engage Framework

Stretch2Engage is a contemporary set of best practice principles to guide the engagement of people using mental health (MH) and alcohol and other drugs (AOD) services, and their friends, families and supporters, in designing and re-designing services. Stretch2Engage acknowledges engagement as a human right fundamental to citizenship, as well as highlighting the benefits to services that engage effectively.

The Stretch2Engage Framework outlines principles and processes that organisations can adopt to offer more contemporary, inclusive and comprehensive engagement practice in direct service settings. Stretch2Engage's focus is not on therapeutic engagement, but on engagement in service design, improvement and evaluation.

Evaluation toolkit

Meaningful engagement asks organisations to think and act differently, which requires a significant investment of resources. It is important that organisations monitor and evaluate the progress of their service engagement initiatives to:

- understand their engagement capacity and how it changes over time
- identify whether new engagement approaches are having positive outcomes
- learn from the engagement processes that are tested, and identify how to further strengthen them in future.

The Stretch2Engage evaluation toolkit is a collection of resources that helps organisations to monitor and evaluate service engagement initiatives. The toolkit includes:

- a brief guide to monitoring and evaluation of service engagement initiatives
- Stretch2Engage Theory of Change
- organisational survey template
- a brief staff survey template



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- **service engagement capacity wheel template and instructions**
- **significant change story template and instructions.**

More information about the Stretch2Engage Framework and the evaluation toolkit is available at: www.qmhc.qld.gov.au/engage-enable/lived-experience-led-reform/stretch2engage.

Introduction

The Stretch2Engage Framework was piloted in Queensland during 2018 and 2019, with the aim of supporting participating organisations to deepen their understanding of service engagement and implement new engagement approaches. Lirata Consulting was commissioned to evaluate the Stretch2Engage Framework in the context of the pilot, to better understand the value of the framework in improving the service engagement capacity of AOD and MH services.

The evaluation found that organisations developed significant new engagement capacities through participating in the pilot, including increased staff knowledge, skills and confidence in using engagement tools and practices, and emerging cultural changes within organisations. As a result, a more diverse range of stakeholders were engaged, and people using services and their families provided more input. Staff became more open to receiving feedback and were able to act on it more effectively. Examples of service improvements included:

- more welcoming waiting rooms
- better intake processes
- improved information for family members.

The evaluation also explored participating organisations' views on how sustainable these improvements are likely to be. While a number of factors were identified that will help to sustain lasting change—including cultural changes,

organisational commitment and leadership support, and access to further resources and coaching—the evaluation also found potential barriers to implementing new engagement initiatives and to sustaining improvements over time.

Therefore, it is important that organisations monitor their progress as they develop their engagement thinking and practice, and evaluate the effectiveness of the initiatives they undertake. Systematic monitoring and evaluation (M&E) will help organisations to clearly see whether enhanced engagement capacity is being developed and sustained, and when corrective actions are required.

This guide outlines some practical tools that organisations can use to independently monitor and evaluate their service engagement capacity and practice.

What is M&E and why is it so important?

M&E can sometimes sound rather academic and complicated, but it does not need to be. Good quality M&E of service engagement initiatives is not hard to do, it just requires a bit of planning and can be scaled to suit the level of resources available.

M&E in a nutshell

Monitoring is the “...planned, ongoing and systematic collection and analysis of program information, to track progress in implementation, and performance against stated objectives and expectations”.¹ The purpose of monitoring is to advise about program performance, and warn of deviations from the original plan or intent.

Evaluation is also planned and systematic; however, it differs from monitoring in that it is a

¹ Adapted from Markiewicz, A, & Patrick, I, *Developing Monitoring and Evaluation Frameworks*. Sage Publishing; 2015.



“...periodic determination of the quality and value of a program, with summative judgment as to the achievement of a program’s goals and objectives”.¹ The purpose of evaluation is to inform program development, implementation and governance by enabling sound decision-making.

Monitoring helps us to see **what** is really happening in our work and to identify any potential issues. Evaluation, on the other hand, can help us understand **why** something is happening, and makes a judgement about the **merit and worth** of our work. M&E go together because monitoring informs evaluation.

So what’s in it for me?

M&E can have important benefits. Some key benefits to organisations include:

- **Demonstrating value:** being able to clearly demonstrate what has been achieved—especially to external audiences such as funders, government and the community.
- **Morale:** helping all staff to understand exactly how the work is progressing, see tangible results from their efforts, and celebrate key achievements.
- **Management of risk:** when things that are slipping off track are identified early, we can address them before they become major issues.
- **Program improvement:** identifying what works well and why—and what does not work so well and why—enables sound decisions to be made about continuing or changing aspects of our work based on evidence.

Ultimately, the information that M&E provides enables organisational learning—which means efforts can be improved, be more effective, and achieve greater social outcomes. To achieve these benefits it is well worth investing a little time and effort in planning for M&E.

How to plan for M&E

Step-by-step

What can organisations do to set up efficient, high-quality M&E of their service engagement capacity and practices? Following is a simple, high-level process outlining the key steps, and some important considerations and tips.

1. Identify and involve the key M&E stakeholders

Consider who should be involved in planning and implementing M&E. This should include service engagement representatives from key programs or service delivery teams—particularly staff with a role in implementing M&E data collection or analysis.

Of course, Stretch2Engage is all about engagement of people who use services, their families and supporters, in service design—they will have an important role to play in evaluating service engagement initiatives. Consider establishing an M&E working group, or inviting service user representatives on existing committees to have input to the M&E plan.

The people who will be most affected by M&E processes or decisions should have meaningful opportunities to inform its design.

2. Define the desired outcomes

Robust M&E is built on a foundation of clearly articulated outcomes. What kinds of changes do we want to see in our organisation’s engagement capacity and practices, as a result of implementing the framework? And what are we ultimately trying to achieve by better engaging with our service users?

Desired outcomes at the organisational level could include increasing staff knowledge, skills and confidence, improved attitudes, and cultural changes. They may also include changes in priorities or the allocation of resources.



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It is also important to focus on the **desired changes in engagement practices** and resulting **medium- to long-term outcomes**. Do we want to see new and different ways of seeking and gaining service users' input, or an increase in the level of information gathered from service users? And how do we expect that to contribute to better quality services, and better experiences for service users?

TIP: The Stretch2Engage Theory of Change is very useful for helping to understand desired outcomes resulting from implementing the framework. Consider what stage of service engagement your organisation is currently at, and what types of changes you are looking for.

Prioritise a small number of outcomes that are most important and appropriate for your organisation at this time. Do not try to focus on too many things at once, or the M&E workload will become overwhelming.

3. Define your evaluation questions

Once the M&E stakeholders have agreed on the desired outcomes, the next step is to decide what you want to know from your M&E. Asking the right questions will ensure the M&E information collected and analysed is useful and relevant. You do not want to end up with reams of data that does not tell you what you need to know.

Formulate a short list of high-level evaluation questions—a bit like research questions—that will guide and focus all M&E activities. Consider things like:

- How **effectively** were the desired outcomes achieved? Why or why not?
- How **efficiently** was the work delivered?
- Were the activities and resources delivered **appropriate** for the people they were designed for, and fit-for-purpose to meet their diverse or specific needs?
- Did we engage people in the **process** effectively? Were various stakeholder groups

satisfied with their involvement and with how the work was managed?

- What needs to be considered to support the future **sustainability** of the achievements and benefits, or of the program itself?

Evaluation questions are not data collection questions, so do not get too detailed at this stage. Focus on the desired outcomes.

For example, if a desired short-term or organisation-level outcome is 'increased staff knowledge and skills in engagement practices', an evaluation question focused on effectiveness could be:

- **'To what extent did the project contribute to increasing staff knowledge and skills?'**

4. Identify indicators

To answer evaluation questions properly, relevant indicators need to be measured. Indicators are items that can be measured to provide evidence of whether a particular change or condition has occurred, and to what extent.

What tangible changes can be measured that will give evidence about whether the desired outcomes were achieved? Examples of some indicators relevant to Stretch2Engage could include:

- the proportion of staff with increased knowledge of (or skills in) engagement practices
- the number or type of new engagement mechanisms implemented over a certain period
- growth in the number of service users and family members whose feedback is sought by the organisation.

Indicators need to be specifically chosen to suit each evaluation question, and there is likely be more than one indicator per question.

Tip: The metrics and questions in the Stretch2Engage capacity wheel and survey tools are a useful source of possible indicators.



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Consider which metrics and questions are most relevant to the desired outcomes and evaluation questions your organisation has prioritised.

5. Select data collection methods

In planning for data collection, for each indicator, think about:

- **Who** do we need to ask about this? Or **where** is this data kept?
- And, **how** can we best collect it?

Keep the data collection plan contained and practical. Many organisations will not have lots of time or money to spend on collecting data, so consider what is feasible to collect within the available resources.

Tip: You can build on the Stretch2Engage survey, capacity wheel and significant change story tools to collect data from your service users and staff. These tools can be tailored to better align with your evaluation questions and indicators if necessary.

Also consider what will work best for the stakeholders you need to collect data from. How much time are they likely to have to share their feedback? What channels or formats work best for them—verbal or written, individual or in groups? The easier you can make it for people to participate, the more complete and reliable your M&E information will be.

Tools for data collection

The Stretch2Engage evaluation toolkit includes four data collection tools available to organisations to help them monitor and evaluate their service engagement work—an organisational survey, a staff survey, the capacity wheel template and the significant change story collection template. These tools were trialled in the Stretch2Engage pilot and have been adapted to make them easy for other organisations to use.

- **Organisational survey**—an in-depth evaluation survey, which collects a mix of

qualitative and quantitative data on implementation and outcomes of Stretch2Engage and associated service engagement activities. Potentially suited to a range of stakeholders.

- **Brief staff survey**—a short monitoring survey suitable for quickly gauging staff views on service engagement. It can be used periodically to track progress over time.
- **Service engagement capacity wheel**—a visual format, which can be used in conversation with stakeholders to rate key dimensions of organisational capacity and culture, which support service engagement.
- **Significant change story template**—a tool for documenting positive, personal stories from a wide range of stakeholders about changes that have occurred as a result of implementing Stretch2Engage. These stories are valuable for demonstrating progress and achievements, celebrating success, advocating for funding, and wider sector capacity building.

Consider using one or more of these tools periodically—for example every six months or annually. This will give your organisation a clear and up-to-date understanding of how it is tracking with service engagement, whether achievements are being sustained, and where future efforts should be focused.

Other methods

Focus group discussions and one-on-one interviews can also be useful evaluation methods, especially for capturing more reflective or qualitative feedback from stakeholders. If the organisation lacks time or expertise to run these in-house, an evaluation consultant could assist, budget permitting.

Using M&E information

Think about how you will analyse, report on, reflect on, and use the information collected. Interpreting the data and presenting findings in an engaging way can take time. However, it does



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not need to be a significant task. A three-page summary of themes and key statistics may be more useful than a 50-page document.

Consider the most effective way to communicate with different stakeholder groups—a report may not suit everyone. How will management receive the M&E findings and think about the suggested improvements? How could frontline staff or service users best engage with the findings?

Clear accountability for implementing the key lessons and improvements that emerge from M&E is vital. Who is in charge of actioning the decisions? How can service users and their families, carers and supporters be involved? And how will progress be communicated?

When M&E becomes an ongoing cycle of continuous learning and improvement, rather than a one-off exercise, organisations are powerfully equipped to make sound decisions that can further improve engagement capacity, enhance the effectiveness of their practice, and ultimately support better outcomes for service users and the organisation.

Resources

More information about the Stretch2Engage Framework and the evaluation toolkit is available at: www.qmhc.qld.gov.au/engage-enable/lived-experience-led-reform/stretch2engage. The following resources may also be useful for

organisations in planning and implementing M&E initiatives:

- **Lirata: DIY Outcomes Measurement** (www.lirata.com/index.php/resources/14-evaluation-and-monitoring/11-d-i-y-outcome-measurement). This article provides some general guidance and considerations for organisations starting out with measuring the outcomes of their work.
- **Better Evaluation: Rainbow Framework** (www.betterevaluation.org/en/rainbow_framework). Describes the key stages of evaluation and provides a range of options for tasks within each stage.
- **Book: Developing Monitoring and Evaluation Frameworks** (us.sagepub.com/en-us/nam/developing-monitoring-and-evaluation-frameworks/book243779) by Anne Markiewicz and Ian Patrick (2015). A practical and comprehensive book providing clear, step-by-step guidance on how to develop an M&E framework in a participatory, logical and integrated way.

Further information

For further information about Stretch2Engage or the evaluation toolkit, contact **Queensland Mental Health Commission**:

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