

TIP #1

Hello! We are **Kellie Hall**, from the [National Association of County & City Health Officials \(NACCHO\)](#), and **Emmalou Norland**, from Cedarloch Research, LLC. We have worked in consort as internal and external evaluators on public health programs. During our time together, evaluation has been growing in popularity within the non-profit sector—and with that, so has the need to engage stakeholder groups from multiple levels (i.e., top executives, program managers, and front-line staff).

Lessons Learned: The importance of stakeholder engagement during evaluation—particularly as a critical component in ensuring the evaluation meets the utility standard—is well known in the field. As familiar as the concept is, however, the complex nature of engaging stakeholders in appropriate ways can be a perplexing challenge. For example, when federal funding dictates not only that a program evaluation *must* be done but also specifies its design, engaging stakeholders in the planning phase can seem superfluous. Furthermore, stakeholder engagement sessions typically focus on the *why* behind engagement, rather than the *how* of engagement with those of varying authoritative powers, divergent priorities, and competing needs.

Understanding these contextual factors is crucial to engaging various levels of stakeholders.

Hot Tip: Engage stakeholders in the process of determining how to engage stakeholders! Many evaluators begin their stakeholder engagement by creating a Stakeholder Engagement Plan. Instead, start one step earlier.

One way to do this is to gather your stakeholders together for a “hack-a-thon,” a process that comes from the technology field and is focused on collaborative problem solving. This highly interactive meeting starts with your stakeholders and ends with solutions tailored to address their needs. During a “hack-a-thon,” each stakeholder group works through the following stages *together*:

1. Empathizing with another stakeholder group
2. Defining a focused need for that other stakeholder group
3. Ideating solutions to address that need
4. Deciding on the most effective solution

(Check out an example hack-a-thon setup, including handouts, [here](#).)

Then, you can use the results developed by the stakeholders themselves to create a “Stakeholder Profile” for each group, documenting their power, values, priorities, and engagement needs. This is now the beginning of your Stakeholder Engagement Plan!

Rad Resources: Some great stakeholder planning resources that I’ve referenced in my work include: Maryland

Department of Information Technology’s [Stakeholder Management Template](#),

CDC’s Program Evaluation [Planning Tool](#), and Measure

Evaluation’s [Stakeholder Engagement Tool](#).

If you have a useful stakeholder engagement resource, please share in the comments below.

*The American Evaluation Association is celebrating **Labor Day Week in Evaluation: Honoring the WORK of evaluation**. The contributions this week are tributes to the behind the scenes and often underappreciated work evaluators do.*

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TIP #2

[stakeholder engagement](#)

Hi, I'm [Leah Goldstein Moses](#), Founder and CEO at [The Improve Group](#), an evaluation consulting firm based in Minnesota.

Traditional evaluation approaches can miss important information by failing to account for context or differences across communities. Our firm created and practiced the Community-Responsive Approach to evaluation to engage stakeholders for better data, better relationships – and more fun!

Ultimately, community members know their communities best.

Community members and stakeholders can provide critical input to evaluators in every stage of an evaluation – something The Improve Group has learned yields the most comprehensive and authentic findings.

To share our lessons learned, I created an [E-Study](#) on the importance of community engagement in evaluation. This E-Study was developed for the [Hubert Project](#), an open-source resource for public affairs educators based at the University of Minnesota's [Humphrey School of Public Affairs](#). In the E-Study, I share our model for engaging community members in evaluation, our Community-Responsive Approach.

Rad Resource: The new E-Study, "[Evaluation as Engagement](#)," features two past clients that are masters of working effectively in their communities. [African Immigrant Services](#) works to increase civic engagement among communities of color. [Urban Roots](#) is a Saint Paul organization that works to empower youth through nature. The learning modules in this E-Study speak to the importance of community engagement in every step of evaluation, from defining what is being evaluated to sharing results.

For Urban Roots, using a Community-Responsive Approach meant getting more in-depth, authentic answers from youth through more appropriate evaluation methods, like youth interviewing each other or storytelling. At African Immigrant Services, stakeholder involvement ensured they worked towards a community vision of success – and that the stories of a community are not filtered through the lens of someone else.

Lesson Learned: Through hundreds of evaluations over the last 17 years, The Improve Group team developed and practices a Community-Responsive Approach to ensure that the unique perspectives of all affected communities and stakeholder groups are represented in the evaluation process. By being responsive to each community's distinct characteristics and by involving individual community stakeholders in our evaluation design, we are more likely to hear authentic experiences, concerns, and results.

We developed our Community-Responsive Approach based on what we noticed was working well, such as:

Engaging community members as advisors

Identifying and enlisting community experts to contribute to and lead aspects of the evaluation

Using multiple methods of data collection and analysis

Using a multi-phased, iterative approach that allows you to layer learning from multiple community members in each phase

The American Evaluation Association is highlighting the work of The Improve Group. The contributions all this week to aea365 come from staff of The Improve Group. Do you have questions, concerns, kudos, or content to extend this aea365 contribution? Please add them in the comments section for this post on the [aea365 webpage](#) so that we may enrich our community of practice. Would you like to submit an aea365 Tip? Please send a note of interest to aea365@eval.org. aea365 is sponsored by the [American Evaluation Association](#) and provides a Tip-a-Day by and for evaluators.

TIP #3

I'm **Alice Walters**, a member of AEA's Graduate Student and New Evaluator TIG. I am a doctoral student in human services and work as a non-profit consultant in fund development, marketing, and evaluation. Here, I explore potential pitfalls and recommendations based on experience with stakeholders for new evaluators.

Hot Tip 1: Stakeholders are central to evaluation – include them in every step of the process.

This may be Evaluation 101 but it bears emphasizing. Identify, include, and inform stakeholders. Think carefully and critically about all involved parties in evaluation outcomes. Leaving out key stakeholders may lead to poor quality evaluation in unrepresented perspectives. Key decision-making stakeholders should be engaged in the evaluation process to ensure evaluation relevancy.

Rad Resource: [Engaging Stakeholders](#) This CDC guide has a worksheet for identifying and including stakeholders in evaluation.

Hot Tip 2: Be proactive in frequent & ongoing communication to stakeholders.

Don't assume that initial evaluation conversations and perspectives haven't changed without your knowledge. Frequent communication with stakeholders will alert you to any changes in stakeholder perspectives toward the evaluation. Ongoing communication will also keep lines of communication open and inform stakeholders of evaluation progress.

Rad Resource: [A Practical Guide for Engaging Stakeholders in Developing Evaluation Questions](#) This 48-page resource from the Robert Wood Johnson Foundation covers engaging stakeholders throughout the evaluation process. It provides worksheets and a range of useful communication strategies.

Hot Tip 3: Take the time to consider stakeholder's views at every stage of evaluation.

Stakeholders may be unclear about the evaluation process, its steps, and methods used. Be sure to explain and continue to inform at every stage of evaluation. As a new evaluator, I made the faulty assumption that stakeholder views were unchanging from initial evaluation meetings. I also failed to use opportunities to communicate during evaluation stages that might have signaled changing circumstances from stakeholder response. Evaluators should be cautious about assuming that evaluation environments and stakeholder views are static.

Rad Resource: [Who Wants to Know?](#) A 4-page tip sheet from Wilder Research on stakeholder involvement. Evaluators have an expertise that may require working away from direct stakeholder contact, particularly key decision-making stakeholders. The relevancy of an evaluation requires ongoing stakeholder input. Successful evaluation requires keeping communication channels open with stakeholders.

AEA is celebrating GSNE Week with our colleagues in the Graduate Student and New Evaluators AEA Topical Interest Group. The contributions all this week to aea365 come from our GSNE TIG members. Do you have questions, concerns, kudos, or content to extend this aea365 contribution? Please add them in the comments section for this post on the aea365 webpage so that we may enrich our community of practice. Would you like to submit an aea365 Tip? Please send a note of interest to aea365@eval.org. aea365 is sponsored by the American Evaluation Association and provides a Tip-a-Day by and for evaluators.

TIP #4

[stakeholders](#)

Hi, I am **Jennifer Johnson**. I am the Director of the Division of Public Health Statistics and Performance Management for the [Florida Department of Health](#). I want to discuss how improving stakeholder relationships can improve data collection.

In most evaluations, collection of quantitative and qualitative data forms a critical aspect of stakeholder engagement and relationships. Methods for collecting both types of data can include structured interviews, surveys, and file reviews. Evaluators also analyze data sets that vary in number and types of variables and formats.

Ultimately, however, key stakeholders provide the data. Thus, effective relationships with key stakeholders can be the lifeline to the data upon which a strong evaluation depends.

Whether participation is voluntary or contractually required, evaluators can adopt practices throughout evaluations that enhance stakeholder engagement specific to data collection. These practices foster effective and clear communication and help evaluators to establish trust.

Hot Tips:

1. **Communicate with Leadership.** Initiate engagement with the executive leadership of stakeholder organizations, unless the evaluator has identified specific individuals. Give stakeholder leadership the opportunity to establish parameters and requests for communication throughout the evaluation. These parameters should identify those individuals or groups to always keep informed. Follow up by clarifying what the rules of engagement will be. Ensure that members of the evaluation team follow this agreement.
2. **Communicate Early.** Be forthcoming and transparent from the beginning. Clearly communicate the evaluation scope at initial meetings. Specify data and data collection method that the evaluator may request from stakeholders. Inform stakeholders at this stage whether they will have an opportunity to review and discuss preliminary results and conclusions based on their data.
3. **Communicate Specifics.** Develop clear and thorough processes for collecting data. Develop and submit data requests that clearly articulate and specify the requested data and information. Include specific variables when requesting databases. Include specific and clear instructions for submitting data. Provide an easy and convenient method for feedback and questions. Set reasonable deadlines and consider stakeholder organizational factors, such as crunch times staffing, and workload issues. If possible, modify data requests based on extenuating circumstances or to ease the burden on the stakeholder.
4. **Communicate Strategically.** Data exchanges goes in both directions. Identify opportunities to answer stakeholder questions or provide information. Share results and information that could benefit stakeholders, but only if that sharing does not compromise the evaluation or use additional resources. This could include information that helps stakeholders address organizational problems or improve performance.

*The American Evaluation Association is celebrating **Southeast Evaluation Association (SEA) Affiliate Professional Development Week** with our colleagues in the SEA Affiliate. The contributions all this week to aea365 come from SEA Affiliate members. Do you have questions, concerns, kudos, or content to extend this aea365 contribution? Please add them in the comments section for this post on the [aea365 webpage](#) so that we may enrich our community of practice. Would you like to submit an aea365 Tip? Please send a note of interest to aea365@eval.org. aea365 is sponsored by the [American Evaluation Association](#) and provides a Tip-a-Day by and for evaluators.*

TIP #5

[communication](#) · [Data Collection](#) · [stakeholder engagement](#)

My name is **Dr. Moya Alfonso, MSPH**, and I'm an Associate Professor at the [Jiann-Ping Hsu College of Public Health](#) at [Georgia Southern University](#), and I am University Sector Representative and Board Member for the [Southeast Evaluation Association \(SEA\)](#). I would like to offer you a few tips on engaging stakeholders in participatory evaluation based on my 16 years of experience engaging stakeholders in community health research and evaluation.

Participatory evaluation is an approach that engages stakeholders in each step of the process. Rather than the trained evaluator solely directing the evaluation, participatory evaluation requires a collaborative approach. Evaluators work alongside stakeholders in developing research questions, deciding upon an evaluation design, designing instruments, selecting methods, gathering and analyzing data, and disseminating results. Participatory evaluation results in stronger evaluation designs and greater external validity because community members have a high level of input in entire process. It also strengthens buy-in to the results and a greater use of the evaluation products.

Rad Resource: Explore the [University of Kansas Community Tool Box](#) for introductory information on participatory evaluation.

Hot Tips: Here are a few tips for engaging stakeholders:

Establish a diverse stakeholder advisory group: Community stakeholders have a range of skills that can contribute to the evaluation process. For example, I worked with 8th grade youth on a participatory research project and assumed that I would need to conduct the statistical analysis of survey data. To my surprise, one of the youths had considerable expertise and was able to conduct the analysis with little assistance. With training and support, community stakeholders can contribute and exceed your expectations.

Keep stakeholders busy: A common problem in working with advisory groups is attrition. Keep community stakeholders engaged with evaluation tasks that use their unique skill sets. Matching assignments to existing skill sets empower community stakeholders and result in increased buy-in and engagement.

Celebrate successes: Celebrating successes over the course of the evaluation is a proven strategy for keeping stakeholders engaged. Rather than waiting until the end of the evaluation, reward stakeholders regularly for the completion of evaluation steps.

Keep your ego in check: Some highly trained evaluators might find handing over the reins to community stakeholders challenging because they're used to running the show. Participatory evaluation requires evaluators to share control and collaborate with community stakeholders. Try to keep an open mind and trust in the abilities of community stakeholders to participate in the evaluation process with your support and guidance. You'll be amazed at what you can achieve when stakeholders are fully engaged in evaluation research!

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TIP #6

[participatory evaluation](#) · [stakeholder engagement](#)

Hello, we are **Dani Rae Gorman** and **Angela Nancy Mendoza**, former scholars of the AEA Graduate Diversity Education Internship (GEDI) program 2015-2016 cohort. We'd like to share some of our lessons learned throughout the program in engaging stakeholders from the inception and throughout the process of evaluation.

Lessons Learned:

Consistent Engagement

Evaluation phases change over a project's life, and it is important to include stakeholders at each step. In many cases, stakeholders help to plan what they want, but are less involved with tasks such as helping to understand what the data mean and assisting in creating an effective way to communicate these findings. Having the right people involved from the beginning and keeping them involved throughout the evaluation are critical to the process. It increases the evaluation's accuracy, appropriateness and utility. For example, having evaluation stakeholders involved in the interpretation of results to ensure the evaluators are getting the right message and are aware of important nuances.

Creating Value and Utility

In conducting relevant and accurate evaluations, it is important to understand the cultural context and communities in which the evaluation is to be carried out. Consideration and responsiveness to these factors help to ensure that an evaluation captures nuances and specific needs to help create an evaluation product that is accurate and useful to stakeholders.

Identifying and Engaging a Diversity of Stakeholders

Engaging stakeholders requires the identification of those whom the evaluation will impact. This includes program staff, managers, project leaders, clients, community members, and other stakeholders who may be affected by the evaluation findings. Engaging a diversity of stakeholders aides in creating an understanding of the identity being evaluated, its members and its culture. This in turn helps to ensure that informative questions are asked in the right way and that the outcomes are meaningful and useful to stakeholders.

Hot Tip:

Be patient and flexible in working to engage stakeholders through the evaluation process. It can be a challenge to facilitate engagement throughout the stages of an evaluation and individuals may have different experiences, perspectives, and responsibilities, but consistent engagement can create added value and utility of evaluation findings.

Rad Resources:

[Better Evaluation](#)

Bryson, J.M., Patton, M.Q., & Bowman, R.A. (2011). [Working with evaluation stakeholders: A rational, step-wise approach and toolkit](#). *Evaluation and Program Planning*, 34, 1-12.

[CDC Evaluation Guide Step 1](#)

The American Evaluation Association is celebrating Graduate Education Diversity Internship (GEDI) Program week. The contributions all this week to aea365 come from AEA's GEDI Program and its interns. For more information on GEDI, see their webpage here: <http://www.eval.org/GEDI> Do you have questions,

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TIP #7

[GEDI · stakeholder engagement](#)

Hello, my name is **Kenneth Pass**. I am a doctoral student in the Department of Sociology at Northwestern University and a recent Graduate Education Diversity Internship (GEDI) program alumnus. During my GEDI internship at Growth Capital Network in Ann Arbor, Michigan, I engaged in various health, evaluation, and philanthropic projects with state and local community organizations. Throughout this internship I have learned important lessons on community-centered frameworks, diverse health programs throughout the state, proposal and grant evaluation, and metric and other measurement development.

Lessons Learned:

- 1. Know who is speaking and who is contributing to that voice.** When working with state and local community organizations that are submitting grant proposals to philanthropic and other funding organizations, it is important to know about the applicant and the community they serve, and what major partners and stakeholders are involved. This information ensures that you are able to understand the organization and what role it plays and if it is community centered in that role.
- 2. Take stock of evaluation capacity and investment.** Often I observed that applicants either did not have the capacity to develop and implement an evaluation or prioritize program evaluation. This was an important moment for me – and the applicants. Their lack of evaluation capacities or investment limited how they approached and understood the benefits of program evaluation. Being able to assess an applicant's capacity and investment in evaluation and provide feedback on the meaning, significance, and benefits of evaluation is essential to helping improve community health, as well as working relationships with philanthropic and other funding organizations.
- 3. Encourage potential grantees to think about disparities within communities.** While evaluating applicant proposals, I considered Lessons 1 and 2. I thought more critically about how minority groups would benefit from proposed health programs and initiatives and how communities were being engaged throughout the development, implementation, and evaluation of these health programs. Applicants' programs often involved marginalized or underserved sections of their communities so understanding how proposals addressed gender and racial/ethnic health disparities was key. Given the health burdens that women and people of color carry throughout Michigan and the United States, encouraging state and local community organizations to pay attention to the health disparities present in their communities is crucial to increasing the benefit and scope of any health program.

Through the GEDI internship, I learned more not only about health, evaluation, and philanthropy but also about the importance of discovering, valuing, and centering community voices in program evaluation.

Rad Resources:

- [1. Template for Analyzing Philanthropic Programs Through a Culturally Responsive and Racial Equity Lens](#)
- [2. Advancing Evaluation Practices in Philanthropy by Aspen Institute Program on Philanthropy and Social Innovation](#)

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TIP #8

[culturally responsive evaluation](#) · [GEDI](#)

Hello! We're **Josh Twomey** and **Joan Johnston**, from UMass Medical School's Center for Health Policy and Research ([CHPR](#)). One of the more rewarding opportunities for evaluators is to work with organizations endeavoring towards seismic change. Our own work focuses on helping large medical organizations restructure services to integrate behavioral health care into traditional primary care – a task requiring massive cultural, technological, and logistical shifts. Inherent within this work is an assessment of where the organization is compared to where it hopes to be, along with what changes are needed to achieve transformational goals. While this work can be exciting, it can also be hard to keep all parties motivated. Uncertainty about how large change will impact job satisfaction, concern about working with outsiders (i.e., us), and 'change fatigue' are all common threats to stakeholder engagement. We would like to offer some tips to avoiding barriers to change and keeping clients motivated.

Hot Tips:

Acknowledge the Content Experts – Evaluators often have the benefit of an external perspective (i.e., the bird's eye view of the end goal and how to get there). While this can lead to some great data-driven insights, it is important to recognize that we may not always understand what is happening on the ground. Communicate early and often to clients/stakeholders that they are the content experts and their expertise is essential to driving change.

Reinforce Importance and Value of Data Collection – In large scale change efforts, evaluators often collect a lot of data. Surveys, interviews, and other data requests can tax stakeholder time and squander goodwill. It is vital to be able to explain to stakeholders the importance of all data that you hope to collect. If you cannot justify the value of the data you ask for, stakeholders will see little value in spending time to provide it.

Change is Hard – Whether vocalized or not, change can be filled with fears, tensions, and uncertainties. This happens when people are asked to do their jobs in ways that are different from what they are used to. As evaluators or outside consultants, it is important for us to be beacons of the end goal. However, it is also important for us to recognize and empathize with clients' concerns. Environments where clients can voice these concerns and receive genuine validation can be great incubators of change.

As agents of change, evaluators can have a great impact in helping to support transformational efforts. We have found that the more open we are to the concerns, needs, and contributions of our clients, the more effective we are in supporting organizational advancement.

Rad Resources:

[A Way of Being \(Rogers, 1980\)](#)

[Building measurement and data collection into medical practice \(Nelson et al., 1998\)](#)

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TIP #9

[change](#)

Hello! I am **Ravneet Tiwana**, principal independent consultant with KHOJ Consulting. Evaluation questions are one of the most important elements in an evaluation design because they focus the study by functioning as flashlights in a deep sea of data. Often times, determining evaluation questions is something the client believes the evaluator should do as a hired expert. The evaluator often wants to partner with the client/key stakeholders to determine these questions in order to ensure usability of evaluation findings.

Lesson Learned: As evaluators, many of us know, that more engaged stakeholders lead to increased use of evaluation findings. The process of stakeholder engagement, according to Hallie Preskill Ph.D. and Nathalie Jones of FSG, increases quality, scope, and depth of questions, ensures transparency, facilitates the evaluation process, acknowledges the political context, builds evaluation capacity, and fosters relationships and collaboration. Ultimately, an evaluation supports evidence-based decision-making and brings transparency to this process when commissioned for accountability and/or continuous improvement purposes. Therefore, it is important to have good evaluation questions based on stakeholders' primary information needs in order for the evaluation findings to be useful for these purposes. But, how do you do engage stakeholders? And do it, effectively? I found the included resources helpful in developing strategies to engage key stakeholders. One resource is helpful in identifying what kind of information is needed to create high-quality evaluation questions. The other resource is useful for identifying the most appropriate medium for engaging key stakeholders, particularly when you have quite a few scattered across cities, states, or countries.

Rad Resources: I have found the following resources helpful in developing evaluation questions with stakeholder groups.

Evaluation Toolkit for Magnet School Programs: Provides a checklist for high-quality questions: [Checklist: Developing High-Quality Evaluation Questions](#)

[A Practical Guide for Engaging Stakeholders in Developing Evaluation Questions](#): Provides overall guidance on the purpose of good evaluation questions in ensuring useful, credible, and relevant evaluation findings. The guide also shares techniques and criteria for engaging stakeholders and the best medium for doing so.

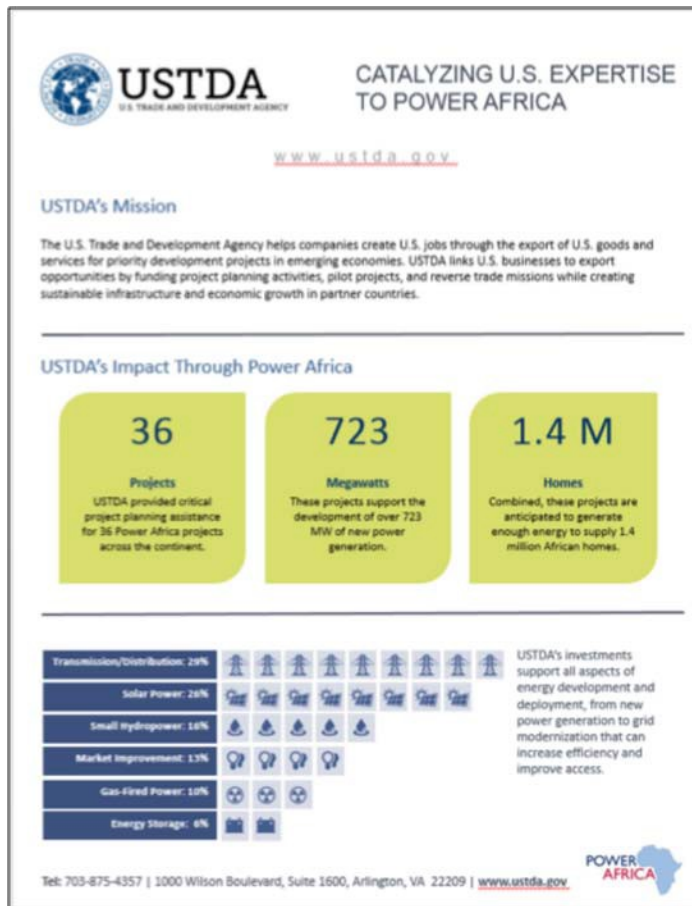
Hope this helps in doing your work!

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TIP #10

[evaluation questions](#)

My name is **Diana Harbison** and I'm the Director of the Program Monitoring and Evaluation Office at the U.S. Trade and Development Agency, which links U.S. businesses to global infrastructure opportunities. According to a recent [survey](#), USTDA has some of the most engaged employees in the United States government. There are countless articles – and entire consulting businesses – built around the concept of “employee engagement,” but I think the reason USTDA is successful is, in part, that our employees are engaged in evaluation.



My office, as well as the rest of the Agency's staff, collects feedback from our partners – over 2,000 last year – to evaluate the commercial and development results of the activities we have funded. We utilize this data to inform our daily, project-specific decisions. We also gather as a group once a year to review our results and discuss where we should focus our resources. This allows us to prioritize the countries and sectors where we work, and to identify new approaches for collaborating with our stakeholders – including our most important customers, the American people. We often employ data to communicate how our partners have or could benefit from our programs.

We also love to tell stories, like the time a South African pilot stood up and told an audience that she had been unsure about her career path but after participating in an aviation workshop we hosted, knew what she wanted to do next and was excited about the future. Or the time a small business owner told me that his first USTDA contract helped him expand his business in just three years, and he now has hundreds of millions of dollars in business, working with new clients. We have so many stories about our accomplishments that we have begun sharing them publicly on our website as [staff commentaries](#).

My colleagues are committed to our mission and engaged in their work every day. Instead of simply doing what is required, they utilize our results to go beyond and do what is possible. So when I'm asked how USTDA continuously [drives performance results](#) and maintains such an engaged staff, I say it's because everyone values – and evaluates – their work.

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