

Community Engagement Plan for the Development of the Mental Health Student Services Act (MHSSA) Evaluation Plan

Created by WestEd for the California
Mental Health Services Oversight &
Accountability Commission

September 2023

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Background

The Mental Health Student Services Act (MHSSA) “provides grants for partnerships between county mental health agencies and local education agencies to deliver school-based mental health services to young people and their families. These partnerships support outreach to identify early signs of unmet mental health needs, reduce stigma and discrimination, and prevent unmet mental health needs from becoming severe and disabling.”¹ Grant applicants include “counties, cities, or multicity mental health agencies, or consortiums of those entities, working in partnership with one or more school districts and either a county office of education or a charter school.”² Representing 57 of 58 counties across the state, MHSSA grantees are using their funds to support a range of practices and programs to build capacity for school-based mental health service delivery. These include implementation of mental health screenings and assessments, school-based wellness centers, social and emotional learning (SEL), multi-tiered systems of support (MTSS), direct service provision, and professional learning for providers and educators, among other school-based mental health efforts.³ The MHSSA is led by California’s Mental Health Services Oversight and Accountability Commission (MHSOAC) (also referred to as “the Commission”).

¹ Mental Health Services Oversight & Accountability Commission. (2023). *Mental Health Student Services Act*. State of California. <https://mhsoac.ca.gov/initiatives/school-mental-health/>

² Mental Health Services Oversight & Accountability Commission. (2023). *Mental Health Student Services Act*. State of California. <https://mhsoac.ca.gov/initiatives/school-mental-health/>

³ Examples of programs are drawn from the 2022 MHSSA Grantee Survey, representing 51 partnerships.

Purpose of the Community Engagement Plan

The Commission has contracted WestEd to develop a plan for evaluating the MHSSA. This document outlines the Community Engagement (CE) Plan for developing the MHSSA Evaluation Plan. The CE Plan describes how WestEd and the Commission will partner with MHSSA-impacted community members—including students, parents/caregivers, educators, providers, and system administrators—to develop an evaluation framework, research questions, school mental health metrics, and the broader evaluation plan. The document also describes how WestEd and the Commission will conduct outreach and communicate information to MHSSA partners, as well as manage the implementation of the CE Plan.

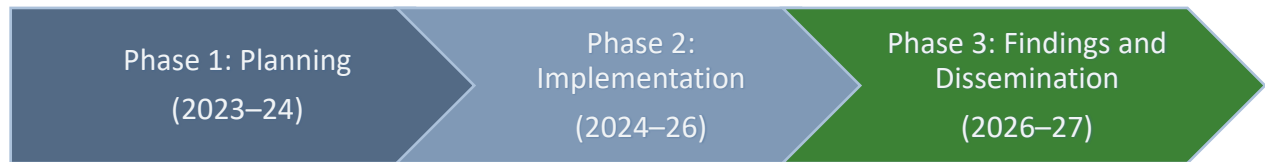
The Commission aims to conduct an evaluation that supports transformational change in school mental health. Community engagement is foundational to the Commission’s goals for the MHSSA evaluation, which include the following:

1. Develop performance metrics that cut across systems to create a shared understanding of student success and well-being.
2. Understand the impact of MHSSA on cross-system partnerships, access to comprehensive mental health services in schools and the local communities, and student outcomes (e.g., educational, mental health, and social–emotional).
3. Understand MHSSA implementation (e.g., successes, challenges, and lessons learned) to identify best practices and the need for technical assistance.
4. Understand the different needs/experiences of student subgroups (e.g., socially and economically disadvantaged, BIPOC, and LGBTQ), and the provision of mental health services to close the equity gap.
5. Build comprehensive, effective, and sustainable school mental health systems in local communities.⁴

⁴ Mental Health Services Oversight & Accountability Commission. (2022). *Evaluation budget proposal*. State of California.

The key phases of the MHSSA Evaluation are illustrated in Figure 1. This CE Plan will be implemented in *Phase 1: Planning*.

Figure 1. MHSSA Evaluation Phases



A Working Plan

WestEd recognizes the importance of adapting to emerging needs, interests, and ideas that will inform the design of the MHSSA Evaluation Plan. We also acknowledge the unique and shifting contexts in which the MHSSA evaluation is being implemented at the local and state levels. With this in mind, the CE Plan will be considered a dynamic working plan that may be iterated over time as WestEd, the Commission, and MHSSA community partners learn our way into meaningful community engagement approaches that will inform the design and implementation of a comprehensive, relevant, and responsive evaluation plan.

Key Terms

This document includes the following key terms:

- **Community engagement:** The process of bringing people together who are affiliated by geographic proximity, special interests, or shared experiences to cocreate solutions for meaningful change in their communities.⁵
- **Community partners/impacted community members:** The individuals, organizations, and agencies connected to and/or directly impacted by the MHSSA, including students, parents/caregivers, educators, providers, and system administrators across all levels of the school-based mental health system.
- **Participatory evaluation:** An evaluation approach that involves close collaboration with those who are most proximal to the program, initiative, or organization that's being evaluated. Participants are ideally engaged in all stages of the evaluation, including evaluation design, data collection, analysis, dissemination, and decision-making.⁶
- **Participatory design/co-design:** When individuals or organizations most proximal to a design challenge work together to design or rethink a product, service, program, initiative, or system.⁷

⁵ Adapted from CitizenLab. (2022). *Community engagement: A practitioner's guide. Part two.*

<https://www.citizenlab.co/ebooks-en/community-engagement-a-practitioners-guide-part-2> Also, The Centers for Disease Control and Prevention. (2022). *Engage the community.* <https://www.cdc.gov/chinav/tools/engage.html>

⁶ Cousins, J. B., & Whitmore, E. (1998). Framing participatory evaluation. *New Directions for Evaluation*, 1998(80), 5–23.

⁷ Beyond Sticky Notes. (2023). *What is co-design? An overview.* <https://www.beyondstickynotes.com/what-is-codesign>

Guiding Principles

The following guiding principles are adapted from the Participatory Systems Change for Equity (PSCFE) framework⁸ and will guide our approach to partnering with the MHSSA community to co-design the MHSSA Evaluation Plan:

- **Share power and center self-determination.** Decision-making power is shared by MHSSA community partners. The members of the MHSSA community are experts on their own experiences and are therefore well positioned to help determine what is best for their communities and for the evaluation of the MHSSA.
- **Elevate community strengths and attend to place.** Evaluation efforts center the wisdom of community partners and elevate the strengths of the broader community through meaningful participation in the evaluation process. Evaluation efforts attend to the unique history, relationships, and political and economic contexts of each community with the understanding that no one place is the same. The priorities in one community are not necessarily the same priorities in another, nor should the evaluation efforts across communities be designed to be exactly the same.
- **Build individual and collective capacity and recognize interdependence.** Evaluation efforts recognize that all participants must have the information, tools, skills, and liberatory consciousness they need to participate meaningfully and make informed decisions. Equally important is that communities have the collective capacity to collaborate, make shared decisions, recognize interdependence, and practice reciprocity.
- **Promote culturally responsive and sustaining change.** Evaluation efforts recognize and regard the cultural assets within a community and are responsive to diverse ways of knowing, being, and relating as this process is carried out.
- **Prioritize transparency and accessibility.** Transparent decision-making processes, accessible information, and bidirectional communication among community partners are fundamental to inclusive evaluation processes that seek to build relational trust and effectively partner with the community.

⁸ Valdez, A., Cerna, R., & Hashmi, S. (2023). *Participatory systems change for equity: An inquiry guide for child-, youth-, and family-serving agencies*. California Center for School Climate & Center to Improve Social and Emotional Learning and School Safety. WestEd.

- **Illuminate oppression and take liberatory action.**⁹ Evaluation processes and the resulting actions must be rooted in antiracist, decolonizing approaches and focus on seeing and transforming oppressive system conditions to increase opportunities for Black, Indigenous, and people of color and other minoritized communities, including people with disabilities and mental illness.

Key Considerations

The following key considerations will guide our engagement efforts:

- **Representation.** Ensure that those closest to the impact of the MHSAA are participating in the process, that participants reflect the diversity of MHSSA beneficiaries, and that we center the voices of participants closest to the margins. We will co-design an approach to elevate youth voice and meaningfully engage students and families from underserved communities throughout the MHSSA evaluation.
- **Accessible participation.** Make participation easy and accessible (e.g., drawing on existing events, groups, and venues that are proximal to the community). Communicate clearly and widely and through relevant, accessible communication channels about how community members can participate in the process.
- **Setting expectations.** Set expectations for how, when, and why members of the MHSSA community should participate. Confirm the amount of information, input, and feedback the project team has the capacity to manage and synthesize.¹⁰
- **Attending to bias.** Create frequent opportunities to consider how implicit biases, confirmation biases, and positional power may be influencing sense-making and design.¹¹
- **Closing feedback loops.** Regularly demonstrate how the emerging evaluation plan components are grounded in what has been learned so far from information gathering, sense-making, and co-design efforts. Close feedback loops early and often.¹²

⁹ Valdez, A., Cerna, R., & Hashmi, S. (2023). *Participatory systems change for equity: An inquiry guide for child-, youth-, and family-serving agencies*. California Center for School Climate & Center to Improve Social and Emotional Learning and School Safety. WestEd.

¹⁰ CitizenLab. (2022). *Community engagement: A practitioner's Guide. Part two*. <https://www.citizenlab.co/ebooks-en/community-engagement-a-practitioners-guide-part-2>

¹¹ Valdez, A., Cerna, R., & Hashmi, S. (2023). *Participatory systems change for equity: An inquiry guide for child-, youth-, and family-serving agencies*. California Center for School Climate & Center to Improve Social and Emotional Learning and School Safety. WestEd.

¹² CitizenLab. (2022). *Community Engagement: A Practitioner's Guide Part two*. <https://www.citizenlab.co/ebooks-en/community-engagement-a-practitioners-guide-part-2>

Community Engagement Plan

What We Are Co-Designing: Key Components of the MHSSA Evaluation Plan

WestEd and the Commission will work with MHSSA community partners to co-design processes that inform the development of the key components of the MHSSA Evaluation Plan (Table 1).

Table 1. Key Components of the MHSSA Evaluation Plan

Evaluation plan component	Example topics
Evaluation framework	<ul style="list-style-type: none"> • Description of MHSSA programs (match to need and population/cultural responsiveness and sustainability, evidence-based/informed) • Components of MHSSA implementation • Implementation drivers/systems (e.g., data processes, professional development, leadership, etc.) • Education (ED)/Behavioral Health (BH) partnerships • Key outcomes of MHSSA activities and for whom
Research questions	<ul style="list-style-type: none"> • Most important/meaningful MHSSA outcomes • Understanding facilitators and barriers to cross-system partnerships at the local, county, and state levels • What partners are curious about • What is important to know to improve MHSSA implementation • How MHSSA is informing/contributing to transformational change
School mental health metrics	<ul style="list-style-type: none"> • Current metrics that are used • Metrics to monitor individual and systems outcomes • Metrics to monitor individual- and systems-level implementation • Metrics to assess other inputs such as partnerships, cultural responsiveness, sustainability, etc. • Local level data practices, systems, and capabilities • Needs or gaps in data collection and systems to inform and improve implementation
Data collection plan	<ul style="list-style-type: none"> • Youth and family engagement • Infrastructure for data sharing • Challenges to data collection • Data collection tools to collect individual-level data (surveys, focus groups, etc.)

Evaluation plan	<ul style="list-style-type: none"> • Youth participation in the evaluation • Partner engagement strategies • Concerns and potential barriers to evaluation • Supports for evaluation plan implementation • Design of evaluation dissemination and communications for youth, families, and the public • Alignment with other related initiatives • Supporting capacity building for equitable and sustainable impact beyond MHSSA
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Who Will Co-Design: MHSSA Community Partners

A sample of the following MHSSA community partners will participate in the design of the MHSSA Evaluation Plan. Table 2 describes the partner group we will engage, who the sample of participants is, and strategies that we will likely use to engage the partners. Engaging partners will be an iterative process, as relationship building takes time. As we begin to implement our community engagement plan, we will leverage our relationship with the Commission and grantees to establish relationships with other partners and expect deeper levels of engagement over time as relationships are strengthened.

Table 2. MHSSA Evaluation Planning Partners

Partner	Description	Recruitment approaches
Students	Students who are the beneficiaries of the MHSSA and/or have experiential knowledge of the school-based mental health/behavioral health (MH/BH) system. We will primarily engage students in grades 6–12 directly and lean on the insights of parents and caregivers to understand the experiences of students in grades K–5.	<ul style="list-style-type: none"> • Explore engagement with youth through existing programs on campuses and youth advisory boards. Youth-led initiatives that are already familiar to the MHSSA may be engaged during the MHSSA evaluation planning process^a • Intentionally create opportunities to learn from specific populations of youths through existing advocacy groups and commission stakeholder groups such as the California LGBTQ Health and Human Services Network, California Youth Empowerment Network, and Immigrant and Refugee group contracts. • Partner with organizers of youth convenings, for example, Commission organizers of convenings of 20 local youth student groups in 2024. • Leverage MHSSA grantees and MHSSA committees and other related MHSOAC initiatives (e.g., Youth Advocacy Contracts) to learn about additional spaces to engage

Partner	Description	Recruitment approaches
		<p>youth and to provide an introduction to groups of potential youth participants.</p> <ul style="list-style-type: none"> • Recruit youths through trusted partners in the community, such as local school districts and service providers. • Gather feedback and suggestions from partners about what youth voices are missing and develop responsive strategies to prioritize equitable youth representation. • Collaborate with program partners to elevate youth voice and engage students.
Parents and caregivers	Parents and caregivers of students who are beneficiaries of the MHSSA and/or who may bring experiential knowledge navigating the school-based MH/BH system with and on behalf of the young people they care for, particularly students who are in grades K–5	<ul style="list-style-type: none"> • Learn about spaces to engage parents and caregivers of children who have participated in MHSSA-funded programs from MHSSA grantees and service providers. • Leverage Commission to connect with parents and caregivers through contracts such as NAMI California, United Parents, and the California Association of Mental Health Peer-Run Organization. • Lean on expertise of Commission committees and workgroups to identify ways to recruit parents and caregivers (e.g., Client and Family Leadership Committee, Cultural and Linguistic Competency Committee). • Employ outreach efforts to outside organizations to draw participation from a specific population or context (e.g., CA State PTA).
School-based educators and staff	Teachers, classified staff, and principals who bring experiential knowledge of MHSSA implementation at the school level	<ul style="list-style-type: none"> • Leverage grantees and local education agencies (LEAs) to identify the partners to engage and provide an introduction to prospective participants. • Employ outreach efforts to professional organizations to draw participation from a specific population (e.g., CA Teachers Association). • Leverage existing WestEd connections to connect to educators.

School district and county office of education system administrators	School district and county office of education administrators who contribute to MHSSA coordination and implementation	<ul style="list-style-type: none"> • Leverage grantees to connect to local education system administrators. • Employ outreach efforts to professional organizations to draw participation from a specific population or context (e.g., CA county superintendents, CA Charter Schools Association, Association of California School Administrators).
School-based MH/BH service providers	Service providers, including school- and community-based clinicians and providers (e.g., social workers, counselors, psychologists), as well as case managers, family liaisons, and systems navigators who support implementation of MH/BH services for young people and their families	<ul style="list-style-type: none"> • Leverage county behavioral health and LEA partners to provide recommendations and connection to service providers. • Engage Client and Family Leadership Committee for suggestions to recruit service providers. • Leverage existing WestEd connections to connect to school-based MH/BH service providers. • Employ outreach efforts to professional organizations to draw participation from a specific population (e.g., CA Association of Marriage and Family Therapists, CA Association of School Counselors, CA Association of School Psychologists).
County MH/BH system administrators	County behavioral health department administrators who coordinate the implementation of MHSSA grant programs	<ul style="list-style-type: none"> • Facilitate a warm introduction by the Commission to grantees at a previously scheduled grantee meeting.
State agency administrators	Education and MH/BH state agency administrators who can provide insight on policies, practices, and system alignment and collaboration efforts that may inform MHSSA implementation and continuous improvement	<ul style="list-style-type: none"> • Leverage Commission and existing WestEd connections to connect to state agency administrators. • Invite administrators to scheduled session to respond to components of the MHSSA evaluation plan.
Evaluators of MHSSA Grantee programs	Contracted evaluators responsible for evaluating MHSSA grantee programs	<ul style="list-style-type: none"> • Identify existing evaluators. • Facilitate a warm introduction by the Commission to new grantee evaluators as they are identified.

^a These programs include Bring Change to Mind (BC2M) High School Clubs, NAMI California’s NAMI on Campus High School (NCHS) Clubs, Genders & Sexualities Alliance (GSA) Network, Directing Change Program and Film Contest, and Mental Health America of California’s Youth Empowerment Network (CAYEN).

How We Will Co-Design: Participatory Design Methods

We will use participatory design methods¹³ to co-design an evaluation framework, research questions, school mental health metrics, data collection plan, and the broader evaluation plan with MHSSA community partners. Design efforts will be organized by the following learn/engage/act cycle: **learn** about existing experiences, knowledge, and assets; **engage** in collective sense-making and prototyping of ideas; **act** on moving ideas forward. The design of each MHSSA evaluation plan component will include the following activities:

- **Information gathering.** Learn about existing information, experiential knowledge, and ideas related to the MHSSA evaluation by conducting a combination of document and data reviews, informational interviews, and listening sessions with community partners. These activities are further described in Appendix B.
- **Documentation of learning.** Document and synthesize learning from information gathering along the way to help inform the ongoing development of each evaluation plan component.
- **Sense-making and co-design.** Facilitate sense-making and co-design sessions with MHSSA community partners to make sense of the information that's been gathered and synthesized, to generate ideas, and to prototype components of the MHSSA Evaluation Plan. The gathered and synthesized information shared with participants will be presented in ways that are accessible, engaging, and relevant. Activities may include data walks and design charrettes, among others. These activities are further described in Appendix B.
- **Finalize MHSSA Evaluation Plan components.** Finalize each evaluation plan component based on the prototypes generated during the sense-making and co-design sessions with MHSSA community partners. Incorporate all finalized components into a final MHSSA Evaluation Plan.

Summary of What, Who, How, and When

Community engagement will inform each deliverable through a cyclical, dynamic approach beginning with information gathering, documentation of learning, and sense-making and co-design. The narrative in Table 3 describes the priority groups, by deliverable and subtask, that will likely be engaged, as well as the focus of this engagement.

¹³ Participatory design is a collaborative design process that involves end users in the design process. Definition retrieved from Interaction Design Foundation: <https://www.interaction-design.org/literature/topics/participatory-design>. Participatory design methods will draw from [Liberatory Design](#), [Street Data](#), and [Participatory Systems Change for Equity](#).

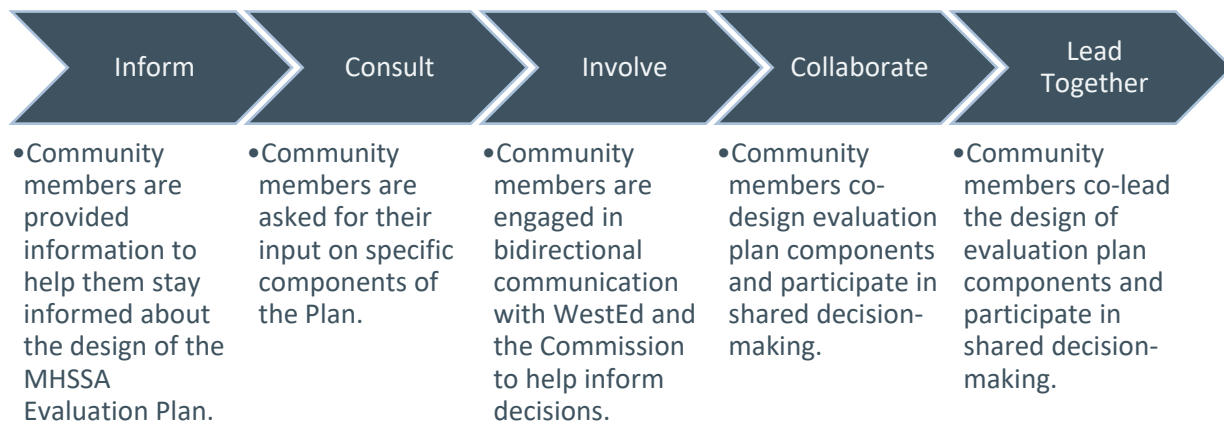
Table 3. Summary of MHSSA Evaluation Planning What, Who, and How

What	Who	How
Evaluation framework and research questions	<ul style="list-style-type: none"> • County behavioral health administrators • School district and county office of education system administrators 	Information gathering to understand MHSSA programs, outcomes, and research questions
	<ul style="list-style-type: none"> • Students • Parents/caregivers 	Information gathering to prioritize outcomes and research questions
	<ul style="list-style-type: none"> • School district and county office of education system administrators • County behavioral health system administrators • External evaluators 	Sense-making to respond to components of the evaluation framework
School mental health metrics	<ul style="list-style-type: none"> • School district and county office of education system administrators • School-linked MH/BH service providers 	Information gathering to understand current metrics used and data collection capabilities
	<ul style="list-style-type: none"> • Students • Parents/caregivers 	Information gathering for accessibility, cultural relevance, and equity considerations
	<ul style="list-style-type: none"> • School district and county office of education system administrators • School-based educators and staff 	Design sessions to co-identify metrics and methods of data collection
	<ul style="list-style-type: none"> • External evaluators • County behavioral health system administrators • Statewide agency administrators 	Sense-making to assess alignment between logic model, indicators, and metrics across the behavioral health system
Evaluation plan	<ul style="list-style-type: none"> • Students • Parents/caregivers 	Information gathering to understand how they would like to be engaged and recruited in an evaluation
	<ul style="list-style-type: none"> • School-based educators and staff • School-linked MH/BH service providers 	Information gathering to capture strengths and concerns related to an MHSSA evaluation
	<ul style="list-style-type: none"> • County behavioral health system administrators • School district and county office of education system administrators 	Design sessions to co-design specific data collection processes
	<ul style="list-style-type: none"> • School-based educators and staff • School-linked MH/BH service providers • School district and county office of education system administrators 	Sense-making to assess feasibility and alignment of evaluation plan with local context
	<ul style="list-style-type: none"> • County behavioral health system administrators • Statewide agency administrators 	Sense-making to assess whole system alignment of the evaluation plan

Levels of Engagement

It will be important to identify appropriate degrees of participation throughout the community engagement process and to avoid forms of nonparticipation, including placation or tokenization. Interest and readiness to engage are influenced by a range of factors, including the level of trust and understanding that individuals may have based on previous experiences with evaluation and/or concerns related to mental health stigma, particularly for youths and their families who are the beneficiaries of the MHSSA and/or have experiential knowledge of the school-based mental health/behavioral health (MH/BH) system. As we aim to build trust, we will work collaboratively with MHSSA partners to determine appropriate forms of participation throughout the development of the MHSSA Evaluation Plan, including involving, collaborating, and leading together. Figure 2 is an illustration of the continuum of engagement that informs the evaluation planning process.

Figure 2. Continuum of Engagement¹⁴



Timeline of Activities

A timeline of community engagement activities is provided in Appendix A. The timeline of activities is organized by deliverables, although we will engage groups in iterative processes that span deliverable deadlines. Thus, the timeline is not meant to be prescriptive, and we will allow for flexibility to engage partners when they are available.

¹⁴ Adapted from [Hart's Ladder of Participation](#) and [Californians for Justice Student Voice Continuum](#).

Project Management of Community Engagement Plan Implementation

Community Engagement Work Plan

The WestEd team has developed a detailed project work plan to guide the implementation of the CE Plan. The work plan includes key CE milestones, supporting activities, staff assignments, and dates to ensure successful and timely completion of the evaluation framework, research questions, school mental health metrics, and evaluation plan. A high-level timeline for the implementation of the CE Plan is included in Appendix A. To successfully implement the activities described within this plan, WestEd will partner with the Commission to establish routines for communication, collaboration, learning, and content production.

Data Security and Management

The WestEd team will adhere to data security protocols, developed in collaboration with the Commission, that emphasize the privacy and security of data, the protection of all human subjects (when applicable), and other ethical standards for research and evaluation. These data security protocols will detail the organization, accessibility, archiving, and secure destruction of project information and data.

Community Engagement Implementation Documentation

The WestEd team will work with the Commission to implement the CE Plan during the 18-month evaluation planning phase and provide documentation of events (e.g., meeting agenda, attendee list) at three specified points during the contract period as indicated in Appendix A. The format of this documentation will be co-determined by WestEd and the Commission. Any updates or revisions to the CE Plan will be documented in project progress reports.

Community Engagement Feedback Loops

With a commitment to transparency and open communication with participants, each community engagement activity will be documented with a community engagement activity summary report. The WestEd team will share back the summary report with meeting attendees through the partner point of contact. Meeting attendees will have access to the document and will be invited to contact the facilitator for corrections, additional insight, and recommendations on next steps in the community engagement process. The summary document will not include any participant names or other identifying information.

Appendix A. Timeline of Activities

The following table provides a high-level timeline of activities to support the co-design of the MHSSA Evaluation Plan.

Table A. Timeline of Activities

Community Engagement Timeline																			
July 2023 - December 2024		2023						2024											
Deliverables & Supporting Activities		Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Collaboration and Coordination with the Commission																			
Bi-weekly meetings with the Commission																			
Communication, Coordination, and Outreach with Community Partners																			
Ongoing communication and coordination with community partners																			
Ongoing outreach to participants																			
Project Management																			
Work plan development and management																			
Data security and management																			
CE implementation documentation 1																			
CE implementation documentation 2																			
CE implementation documentation 3																			
Evaluation Framework and Research Questions																			
Information gathering sessions with community partners																			
Documentation of emerging framework and research questions																			
Sensemaking and design sessions with community partners																			
Finalization of evaluation framework and research questions																			

Community Engagement Timeline																		
July 2023 - December 2024																		
Deliverables & Supporting Activities	2023						2024											
	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
School Mental Health Metrics																		
Information gathering sessions with community partners																		
Documentation of emerging metric ideas																		
Sensemaking and design sessions with community partners																		
Finalization of school mental health metrics																		
Evaluation Plan																		
Information gathering sessions with community partners																		
Documentation of emerging evaluation plan components																		
Sensemaking and design sessions with community partners																		
Finalization of evaluation plan																		

Appendix B. Example Activities

	Method/Activity	Description
Information gathering	Key informant interviews	Key informant interviews are one-on-one conversations between an interviewer and interviewee about a particular topic that the interviewee has deep knowledge of. They are a way to gather information on a topic to help inform decision-making related to a product, process, or initiative. ¹⁵
	Listening sessions	Listening sessions or focus groups include a small group of participants (ideally 6–10 individuals) to generate insights and understanding about a particular topic. Listening sessions allow for open discussion, group learning and reflection, exploration of diverse viewpoints, space to build relationships between participants, and opportunity to gain insight or empathy toward a group of participants about their individual and collective experiences. Following a listening session, the listener assembles and organizes anonymous quotes by theme and summarizes key findings. ¹⁶
	Surveys	Surveys are a method of gathering information, ideas, and insights on a particular topic from a group of individuals by asking them a series of tailored questions. Surveys are a helpful tool for gathering insights and information from many participants in a short period of time and are useful for producing quantitative and qualitative insights. ¹⁷
	Document and data reviews	Document reviews involve a review of existing communication materials, reports, fact sheets, website material, and other artifacts to help build an understanding of current policies, practices, networks, outcomes, and other information about a program, initiative, or organization. Data reviews involve a review of existing quantitative and qualitative data that is relevant to understanding the current state and/or outcomes of a particular program, initiative, or organization. While some document and data review methods may not engage community partners directly, some methods involve having participants participate in the review process or findings from the reviews are shared with participants to help inform collective sense-making and co-design efforts.

¹⁵ Better Evaluation. (n.d.). *Key informant interviews*. Global Evaluation Initiative. <https://www.betterevaluation.org/methods-approaches/methods/key-informant-interviews>

¹⁶ Safir, S., & Dugan, J. (2021). *10 ways to gather Street Data*. Tips adapted from Chapter 4 of *Street Data: A next-generation model for equity, pedagogy, and school transformation*. Corwin.

¹⁷ Brad Rose Consulting. (2017). *The use of surveys in evaluation*. <https://bradroseconsulting.com/the-use-of-surveys-in-evaluation/>

	Method/Activity	Description
Sense-making and co-design	Fishbowls	A fishbowl is a strategy for learning about the experiences and perspectives of a group of people. ¹⁸ Participants are organized into an inner and outer circle. In the inner circle (i.e., fishbowl), participants engage in a facilitated discussion while the outer circle listens to the discussion and writes down key words, phrases, or insights. After the fishbowl, all participants engage in a dialogue about what they have noticed or learned. ¹⁹
	Sense-making sessions	Sense-making sessions are facilitated opportunities for participants to engage in collective listening, reflection, and meaning making. Collective sense-making creates space for “the exploration of meaning beyond the usual boundaries, allowing for different framings, stories and viewpoints to be shared and collectively explored.” ²⁰ Sensemaking is also a helpful exercise to gain a deeper, shared understanding of gathered information (e.g., from document reviews, interviews, focus groups, surveys, or other sources of data). An example sensemaking protocol is a data walk, a process that involves participants individually exploring quantitative and qualitative data (e.g., through data visualizations and other participant-friendly formats) and then collectively reflecting on emerging questions, insights, implications, and ideas. ²¹
	Design sessions	Design sessions are facilitated opportunities for participants to create something together using design methods or cycles. Generally, a design cycle involves an identified design challenge, opportunities to learn about and empathize with lived experiences related to the design challenge, time for generating ideas to address the challenge, and opportunities to prototype an idea or solution. An example design protocol is a design charrette, a facilitated event that brings members of a community together to co-design solutions to a design challenge. ²²

¹⁸ Ritchie, D. (2021). *Field note: Innovative approaches to reconnecting through community conversations*. Tamarack Institute. <https://www.tamarackcommunity.ca/>

¹⁹ Safir, S., & Dugan, J. (2021). *10 ways to gather Street Data*. Tips adapted from Chapter 4 of *Street Data: A next-generation model for equity, pedagogy, and school transformation*. Corwin.

²⁰ Centre for Public Impact. (2023). *What is sensemaking?* <https://www.centreforpublicimpact.org/>

²¹ The Education Trust-West. (n.d.). *Data Equity Walk toolkit*. <https://west.edtrust.org/data-equity-walk-toolkit/>

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