Learning and Leading: Integrating Mixed Methods in a Collaborative Approach to Educational Evaluation

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Abstract: This practice note describes the benefits of integrating mixed methods in a collaborative approach to evaluation with school districts and community partners in southwestern Ontario. We discuss the ways in which the integration of qualitative and quantitative data generated a multi-faceted perspective about a new mental health professional role as a complex educational phenomenon. The insights related to recognizing the role of context, supporting the use of mixed methods with stakeholders, and responding to evolving needs related to youth mental health and well-being in schools highlight the practical value of using mixed methods in a collaborative approach to evaluation.

Keywords: collaboration, education, mental health, mixed methods

Résumé : La présente note sur la pratique décrit les avantages d’intégrer des méthodes mixtes à une approche collaborative pour l'évaluation avec des districts scolaires et des partenaires communautaires dans le sud-ouest de l'Ontario. Nous discutons des façons par lesquelles l’intégration de données qualitatives et quantitatives génère une perspective multidimensionnelle sur le nouveau rôle des professionnels de la santé mentale comme phénomène éducatif complexe. Les propositions liées à la reconnaissance du rôle que joue le contexte, à l’appui de l’utilisation de méthodes mixtes avec des intervenants, et à la réponse aux besoins en pleine évolution en matière de santé mentale chez les jeunes et de bien-être dans les écoles mettent en relief la valeur pratique de l’utilisation de méthodes mixtes dans le cadre d’une approche collaborative en évaluation.

Mots clés : collaboration, éducation, santé mentale, méthodes mixtes

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Mixed methods (MM) orientations have strong potential for generating novel insights about complex phenomena from the requisite integration of quantitative and qualitative research (DeJonckheere et al., 2019). Yet limited practical resources for guiding the implementation of mixed methods within educational settings by teams exist (Poth, 2019). We contribute by offering our experiences from a collaborative evaluation project examining an educational mental health and well-being (MHWB) initiative for youth. We argue that the MHWB initiative can be considered a complex phenomenon, according to Poth (2019), that would benefit from a MM approach because of the many dynamic parts that are intertwined and are influencing and being influenced by one another.

First, we establish that MM evaluation is recognized as an outgrowth from MM that includes evaluation purposes and political contexts (Mertens & Tarsilla, 2015). Raimondo et al. (2016) advised that novel approaches in MM evaluation are required, as no single method can address all of the dimensions of complexity in evaluation. The MM evaluation described in this practice note operates with an understanding that “evaluators function in a world with multiple paradigms associated with different philosophical assumptions” (Mertens & Tarsilla, 2015, p. 5). Evaluations frequently start with establishing specific goals and questions, rather than methodological paradigms. Hence, we did not begin this MHWB project with a MM evaluation perspective. Instead, a MM evaluation design emerged as the only way to address the complexity of this dynamic MHWB process and meet the varied purposes that were identified by an external evaluation team. This team was working across two school districts and with community partners.

We examine how MM were integrated into a collaborative approach to evaluation (CAE; Shulha et al., 2016) to generate understandings of the complex phenomena of supporting an educational MHWB initiative for youth. We unpack the complexity inherent in the contexts surrounding this inquiry and then describe our use of CAE as an appropriate response. We provide an overview of our data procedures while examining when, where, and how integration generated novel insights reflective of multi-faceted perspectives. To conclude, we discuss the benefits of three insights for those working at the intersections of CAE and MM evaluation.

UNPACKING SOURCES OF COMPLEXITY INHERENT IN THE CONTEXTS SURROUNDING THIS INQUIRY

This MM evaluation design is appropriate because of its usefulness for studying complex phenomena involving dynamic, unpredictable situations where there may be no concrete answer (Patton, 2011). This project, encompassing both MHWB program development and evaluation, was initiated because of a well-documented problem, namely that more than one million children and youth are affected by mental illness before the age of 25, with fewer than 20% receiving appropriate treatment (Mental Health Commission of Canada, 2021).
participating school districts in Ontario, similar to other parts of Canada, have youth experiencing mental illness, substance abuse, and suicide, with an estimated 75% who are unable to access specialized services and encountering prohibitive wait times (CMHA, 2020; Statistics Canada, 2018). To address these challenges, this project created and embedded a mental health professional (MHP) across two school districts to support educational MHWB initiatives for youth.

The MHP was envisioned as a liaison who supported MHWB by understanding and addressing attitudes (Hopson & Lawson, 2011), acting in a counsellor/consultative role with students and staff (Berzin et al., 2011), and facilitating parent as well as community engagement (Alameda-Lawson et al., 2010). The MHP was a new role, distinguished as a first-ever formal joint-district position, with a broad description that included navigating district priorities (Catholic and Public) and regional resource availability across a geographically dispersed area. The MHP hired for this role was working in the education sector for the first time, and many people involved were working with an external evaluation team for the first time. Finally, when we are considering sources of complexity, it is worth noting that the MHP role was the first jointly funded initiative, which also received funding from community partners.

The external evaluation team included two co-principal investigators with doctorates in educational research and evaluation who led a team of three associates with varied skills and experiences. As external evaluators, we were contracted to lead a CAE to examine how the MHP role unfolded and provide evidence about early implementation influences of the role on youth MHWB. The main funding for this project, including the evaluation, was received from Ontario’s Ministry of Education (OME). In Canada, education is a provincial mandate, and at the time of this project, there was an emphasis on creating new MHWB roles in schools to improve youth MHWB. While OME support for mental health is ongoing, this project was a result of additional funding released in August 2018 directed at increased MHPs. Evaluation was a funding requirement during the initial year of service. Longstanding relationships, coupled with OME and community funding, as well as a shared vision for changing youth MHWB outcomes, underpinned the project goals and key questions depicted in Figure 1. Our inquiry was designed to reach the goals articulated by collaborators and the triangle denotes an effort to promote consistency with the aligned and integrated model promoted by School Mental Health Ontario (n.d.).

RESPONDING WITH A COLLABORATIVE APPROACH TO EVALUATION

Recognizing the complexity of this context, evaluators responded with a collaborative approach and aligned with recent educational research focused on collaboration as a mechanism for improvement and change (e.g., Fullan, 2001). A CAE (Shulha et al., 2016) was identified as a pragmatic framework to respond to inquiry goals while engaging with stakeholders to understand the efficacy of the MHP role in this model. CAEs promote the usefulness of evaluation by enacting
eight essential principles to guide practice: clarifying motivation for collaboration, fostering meaningful relationships, developing a shared understanding of the program, promoting appropriate participatory processes, monitoring and responding to the resource availability, monitoring the evaluation progress and quality, promoting evaluative thinking, and following through to realize use (Shulha et al., 2016). Authors of the principles note that the principles are to be used holistically and are recognized as nonlinear.

Given the context, the CAE principles provided a foundation for a team-based evaluation approach that allowed us to leverage expertise from varied skill sets and recognize that the dynamic conditions provided a context for learning (Poth, 2018). By enacting a CAE, our intent was to respond to needs of stakeholders while promoting relationality and reciprocity related to a shared commitment for increasing support for youth MHWB. To build upon our previous descriptions of the stakeholders and the evaluation team, Table 1 provides more insight into the composition of those involved in this CAE.

<table>
<thead>
<tr>
<th>Tier 1: Good for All</th>
<th>Inquiry Goal: Determine the influence of having a social worker in the role of MHP across two high schools from different districts</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>What are the activities that a MHP does to support student mental health and well-being in a school context?</td>
</tr>
<tr>
<td>2.</td>
<td>How can having a MHP in the school result in changes to knowledge, attitudes, and skills among teachers and other support staff?</td>
</tr>
<tr>
<td>3.</td>
<td>How do the districts collaborate to facilitate the success of the MHP role?</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Tier 2: Necessary for Some</th>
<th>Inquiry Goal: Identify the effect of the newly created MHP role on the mental health and well-being of students</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>How does the MHP role affect the mental health and well-being of students?</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Tier 3: Essential for a Few</th>
<th>Inquiry Goal: Document how the MHP role generates alignment and access to community supports</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>How do diverse community programs support students’ mental health and well-being?</td>
</tr>
<tr>
<td>2.</td>
<td>How does the MH Strategy, and the MHP role, as a function of this strategy, facilitate access to community resources for students?</td>
</tr>
<tr>
<td>3.</td>
<td>Are students who received MHP support likely to access community supports?</td>
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</table>

**Figure 1.** Overview of MHP inquiry in youth MHWB
Table 1. Overview of stakeholders and evaluation team

<table>
<thead>
<tr>
<th>Role</th>
<th>Situation</th>
<th>Descriptors of role/characteristics</th>
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</thead>
<tbody>
<tr>
<td>Stakeholders</td>
<td>Key stakeholders from within the school district</td>
<td>District directors who report to MOE, District superintendents with MHWB portfolios, District MHWB leads, Existing and new MHP, School leaders, School guidance/support staff, Educators, Students, Youth MHWB and addiction foundation, Public health, Community engagement organization, Public health, Community engagement organization</td>
</tr>
<tr>
<td></td>
<td>Additional school district stakeholders involved (to a lesser extent)</td>
<td>Adjunct/assistant faculty roles at Ontario universities, Credentialed Evaluator, Certified teacher, Working towards a doctorate, Holding a Master’s in Business Administration, Facilitating as a professional artist, Certifying as teachers, Studying educational research and evaluation</td>
</tr>
<tr>
<td>Community Stakeholders</td>
<td>PIs</td>
<td>Adjunct/assistant faculty roles at Ontario universities, Credentialed Evaluator, Certified teacher, Working towards a doctorate, Holding a Master’s in Business Administration, Facilitating as a professional artist, Certifying as teachers, Studying educational research and evaluation</td>
</tr>
<tr>
<td>Evaluation team</td>
<td>Associates were graduate students</td>
<td>Adjunct/assistant faculty roles at Ontario universities, Credentialed Evaluator, Certified teacher, Working towards a doctorate, Holding a Master’s in Business Administration, Facilitating as a professional artist, Certifying as teachers, Studying educational research and evaluation</td>
</tr>
</tbody>
</table>

The evaluation team anticipated that engaging with a range of stakeholders could increase the usefulness of the inquiry and contribute evidence to inform decisions about the MHP role. We recognized that integrating a CAE with a MM evaluation design could meet the reporting requirements for funders. Additionally, we anticipated that the project could provide information to the MHP and other stakeholders who wanted to establish systematic processes and ongoing mechanisms for understanding the efficacy of an embedded MHP, across two districts, as a contributor to youth MHWB.

EMBEDDING LEARNING AND LEADING OF MM IN THIS CAE

In evaluation, context is central to understanding the complexity of, and the ability of methods to inform, decisions within a specific project (Cousins et al., 2014). The evaluation team wanted to design and lead the most appropriate data procedures while utilizing a CAE. Given the number of people involved, we anticipated that some people might lack experience collaborating through the
generation, analysis, and integration of different types of data (Mertens, 2018). To optimize learning, the evaluation team and stakeholders committed to ongoing communication, in the form of email updates (weekly with key stakeholders; monthly with all other stakeholders) and reflective practices at working sessions (all stakeholders every four months).

At the outset of the project, the evaluation team offered a list of methodological options spanning qualitative, quantitative, and MM. We recognized the value of pluralistic methods and understood that a variety of MM designs can be used to respond to complex phenomena (Creswell & Plano Clark, 2018). Evaluation embraces methodological fluidity and responsiveness (Mertens, 2005), and those involved in this CAE wanted to remain open to contextually appropriate methods that met evaluation goals. We recognized the need for different types of data to meet funder requirements (predominantly number of students served) and stakeholder needs (information about the MHP role to support youth). Given these overlapping but distinct needs, a concurrent MM evaluation was identified as an efficacious design (Creswell & Plano Clark, 2018). Figure 2 provides an overview of the methodological orientation and strands of data collection approaches explained in this section.

**Quantitative strand**

The purpose of the quantitative strand was to generate information about the activities and amount of time per activity encompassed in the MHP role, as well as the needs of students in Tier 3 who received counselling from the MHP. Two sources of data, calendar and case load, were collected at four time points: October 2019, January 2020, March 2020, and April 2020. These data sources, relevant analysis and integration are explained in Table 2.
Table 2. Overview of quantitative data strand

<table>
<thead>
<tr>
<th>Source</th>
<th>Purpose</th>
<th>Analysis and integration</th>
</tr>
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</table>
| Calendar | The MHP calendar was categorized to represent key MHWB processes and activities. Categories included interacting with students, time with clients, completing administrative tasks, meeting with school administrators, communicating with parents, and cooperating with community. | - Organization and analysis of data was conducted in Excel.  
- Descriptive statistics for the calendar and caseload data (e.g., average amount of time spent on activities; frequency of referral reasons) were shared first with the MHP and then offered to all stakeholders.  
- Integration of these sources took place in four ways: (1) summary reports integrated both sources of data at each timepoint; (2) interim and cross-time reporting integrated these sources with select qualitative data (document analysis and dialogical data); (3) at the final working session; and (4) end of project reporting, where all data were utilized to respond to evaluation questions. |
| Caseload | A tracking process was established for looking at referral and use trends. Data included students’ age, grade, presenting concern, and resources offered. These variables provided information on the needs and demographics of students served by the MHP role. | - Organization and analysis of data was conducted in Excel.  
- Descriptive statistics for the calendar and caseload data (e.g., average amount of time spent on activities; frequency of referral reasons) were shared first with the MHP and then offered to all stakeholders.  
- Integration of these sources took place in four ways: (1) summary reports integrated both sources of data at each timepoint; (2) interim and cross-time reporting integrated these sources with select qualitative data (document analysis and dialogical data); (3) at the final working session; and (4) end of project reporting, where all data were utilized to respond to evaluation questions. |

Qualitative strand

The purpose of the qualitative strand was to generate detailed information about the evolution of the MHP role by collecting information about the opinions, thoughts, and feelings of those involved. Three sources of data were collected in an iterative and ongoing way throughout the project. Table 3 outlines each data source and specifies the analysis and integration of these sources within the wider project.

Mixed method strand

The purpose of the integrative strand was to generate information from stakeholders about the MHP role, implementation, and CAE (see Table 4). Surveys were administered at two points, the initiation of the inquiry (August 2019) and approximately one month after the final report and presentation (July/August 2020).

Generating and integrating MM in a CAE

The MM design for this CAE is best described as layered and dynamic. Over the course of the project, all data were compiled into one database with each data source first treated as a stand-alone contributor that was analyzed based on the type of source and time point collected. Analysis was typically led by one of the PIs with assistance from two evaluation associates. This enabled the evaluation team...
<table>
<thead>
<tr>
<th>Source</th>
<th>Purpose</th>
<th>Description of data source</th>
<th>Analysis and integration</th>
</tr>
</thead>
<tbody>
<tr>
<td>Document analysis</td>
<td>To model systematic processes, documents were generated throughout to understand the MHP role and implementation.</td>
<td>Documents included role description, regional mental health framework, organizational documents, and meeting minutes.</td>
<td>- Documents were catalogued and synthesized.</td>
</tr>
<tr>
<td>Dialogical Data</td>
<td>Stakeholder interviews about the MHP role were conducted to elicit data about motivations and success criteria. Student interviews aimed to understand the process and influence of a MHP.</td>
<td>At the start and end of the project, semi-structured interviews were conducted ($n = 11$).</td>
<td>- Data from documents were integrated into all working sessions and reporting as a means of monitoring role progression.</td>
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<td>The MHP recommended students, seven months into the project, for semi-structured, in-person interviews ($n = 8$) or a focus group ($n = 5$).</td>
<td>“Wellness days” took place eight months into the project, teachers ($n = 21$) volunteered their classrooms ($n = 500$ students approx.). Student-researchers with the MHP and CAE facilitated discussions and collected inputs in each classroom.</td>
<td>- Interview/focus group data were audio recorded and transcribed. Stage 1 was an inductive analysis related to the MHP role. Stage 2 explored the data deductively based on the evaluation questions.</td>
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<td></td>
<td>“Wellness days” took place eight months into the project, teachers ($n = 21$) volunteered their classrooms ($n = 500$ students approx.). Student-researchers with the MHP and CAE facilitated discussions and collected inputs in each classroom.</td>
<td>Prompts related to the evaluation questions were part of each arts activity. Student-researchers co-facilitated with MHP and CAE to ensure access, inclusivity, and dialogue.</td>
<td>- Insights were shared with the MHP for clarification and then used at a CAE working sessions.</td>
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<td></td>
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<td>- Data were integrated with other sources during interim and final reporting.</td>
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<td>- Analysis took place in two steps. First, on the day of, all data (e.g. notes &amp; cue cards from classrooms, artful pieces/images) were arranged as a data display. Student-researchers joined stakeholders to engage in a two-hour joint analysis session using a three-cycle coding process.</td>
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<td>- Subsequently, the evaluation team organized the data by cataloguing images and transcribing word-based data, including notes from the joint analysis.</td>
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<td></td>
<td></td>
<td></td>
<td>- Data from the “wellness days” were integrated with other sources for use at the working sessions and also integrated in interim and final reporting.</td>
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</table>
Table 4. Overview of mixed method strand

<table>
<thead>
<tr>
<th>Source</th>
<th>Purpose</th>
<th>Analysis and integration</th>
</tr>
</thead>
</table>
| Stakeholder survey      | To reach stakeholders (n = 23) from both districts and community partners, surveys were administered at the start and end of the project. Surveys invited both quantitative and qualitative data. For example, in the first survey, stakeholders were asked to rank, on a five-point Likert scale from “not at all important” to “very important,” tasks related to the MHP role as it was initially conceived. Open-ended questions provided further information about the role development, implementation, successes, and challenges. In the follow-up survey, stakeholders revisited initial questions and commented on the perceived influence of the MHP. | • Surveys were first analyzed by the evaluation team using a three-step process; a preliminary read of all results, then a detailed analysis of each question (filtered results, descriptive statistics, looking for patterns in open-ended) and finally a bringing together of questions.  
• Time 1 survey responses were presented using data displays at the first working session to establish priorities and generate dialogue about implicit and explicit MHP role expectations and success criteria.  
• Time 1 data were integrated with other sources from the quantitative and qualitative strand at interim and final reporting. Time 2 data were shared in follow up with stakeholders, and integration is ongoing. |

to bring different perspectives to the data and explore a range of connections with other sources to enhance understanding of the data properties and relationships with other sources. Insights were always communicated with the MHP first for clarification and then offered to stakeholders at CAE working sessions. Integration of data sources was a key focus in working sessions where processes and templates were used to engage stakeholders in sense-making dialogue and reflection. Ideas from these sessions were recorded and integrated when reporting. Figure 3 offers a pictorial representation of integration throughout the CAE and MM processes, with the broken arrows depicting the integrated analysis within the trajectory of the project and reporting. The figure also shows the procedures we followed and how the strands of data collection were pulled together for a final report.

The CAE working sessions facilitated by the evaluation team proved influential for integrating data sources to generate insights related to the evaluation goals. These sessions involved 15–20 stakeholders who gathered for three to five hours in a shared space. Sessions optimized stakeholder engagement using a variety of processes such as dialogue, stream of consciousness writing, drawing, stakeholder mapping, dot voting, and other reflective learning techniques. Stakeholders provided contextual understanding for data, raised questions, and generated timely...
information. Varied data sources from different time points were offered for integrative and generative discussions that often resulted in immediate project adjustments (e.g., procuring resources for the MHP, inviting a new stakeholder, revising an instrument). It was not uncommon to see slides displaying graphs, craft paper with data on walls and every surface covered with data excerpts, highlighters, sticky notes, and templates for stakeholders to record insights. The sessions were lively, where individual expertise contributed to a sense of cohesion and collective momentum focused on supporting youth MHWB.

**KEY INTEGRATED INSIGHTS**

Youth MHWB represents a complex phenomenon, and evidence establishing the importance of supporting MHWB in society and in education is emerging (CMHA, 2020; Mental Health Commission of Canada, 2021). While the MHP role is not a solution per se to the widespread and significant MHWB challenges facing youth, it is an action-orientated, people-centred, and youth-focused contribution. Collecting distinct data strands that involved a range of participants enabled the evaluation team to assist with the MHP role’s visibility during early implementation. Interpreting the integrated insights generated by the qualitative and quantitative data with stakeholders enabled us to address multiple CAE priorities. Three key integrated insights were generated: Evaluators need to recognize the contexts in which MM are useful, support the use of MM through collaboration with stakeholders, and respond to evolving needs and priorities. Each of these insights is discussed below, considering the principles for CAE.

Figure 3. An overview of generating and integrating MM data in a CAE

*Note. CAE (Collaborative Approaches to Evaluation); CL (Case Load); CA (Caseload Analysis); DD (Dialogical Data); Doc (Document); KS (Key Stakeholders); KSS (Key Stakeholders Survey)*
Recognizing the context

We recognize that complex purposes are a key driver in decisions about evaluation approaches and methods. While MWHB programming and evaluation were mandated by the MOE (funder), a specific approach was not stated. Funders required numbers of students served, whereas education stakeholders recognized that students and those supporting students could be served in many ways. Education stakeholders identified that a more elaborative role, beyond direct support for students, could better address MHWB needs of youth. Community partners were initially viewed as youth MHWB allies who recognized the complexity of youth MHWB by offering specialized services. Thus, community partners were invited to participate in the MHP project and contributed additional resources as stakeholders in this CAE. Early on, stakeholders worked to develop a shared understanding of the MHP project and clarify motivations for evaluation (Shulha et al., 2016).

Stakeholders brought perspectives about what was required to implement and understand the MHP role as well as expertise about people, context, and resources that could be leveraged throughout the MHP project. The MHP project, using a CAE with a MM, meant engaging multiple stakeholder perspectives and listening to their needs and values while working together to identify, collect, and integrate different sources of data to promote understanding about supporting youth MHWB. Integrating multiple forms of data allowed us to recognize that a range of evaluation priorities could be addressed by crafting an inclusive and situationally relevant CAE. Using MM allowed the CAE to meet the needs of both the MOE and stakeholders. The evaluation team used strategies purposefully to incorporate stakeholder expertise to promote integration of discoveries from data sources and useful reporting. The scope of this inquiry was recognized by the Minister of Education. Members of the MOE met with stakeholders and evaluators after the final report to discuss amplifying funding for MHPs and recognized the value of CAEs as a framing for complex educational evaluation.

Support MM through collaboration

The title of this paper refers to leaders and learners; in a complex evaluation such as the MHP project, we all needed to take on different roles. Using three strands of data to support understanding of the MHP role and conversations with stakeholders brought into focus some of the many dimensions related to youth MHWB. Collaborative processes (described as appropriate participatory process by Shulha et al., 2016) during the MHP project included ongoing communications by email, frequent project updates, regular project meetings through Zoom, in-person working sessions for the co-development of instruments and tracking tools, and integrating data prior to reporting. The working sessions provided opportunities for integration because they blended multiple data sources with formal and informal engagement processes as part of the CAE. Having multiple forms of data throughout the CAE enabled us to have in-depth discussions and created a supportive network for the MHP, even as the role and evaluation were emerging. The CAE facilitated ongoing analysis and integration over the project lifespan, and
processes were adjusted as needed, in relation to the complexity of the inquiry, stakeholder needs, discoveries in the data, and evaluator expertise. The ongoing support is an example of monitoring resource availability, evaluation progress, and quality by responding to these as needed (Shulha et al., 2016). The enormity of this project is visible in hindsight but was less dominant in the moment; in the moment, the project was led by passionate people who had both head and heart invested in learning about a new MHP role as one effort for optimizing support for youth MHWB in education.

**Responding to evolving needs and priorities**

The CAE used purposeful MM processes to respond to differing needs of funders and stakeholders; we also capitalized on opportunities that emerged throughout the inquiry. For example, we had not planned on having students in a researcher-evaluator role at the outset, but when the opportunity for students to facilitate classroom discussions and “wellness days” was suggested, we knew there was value in involving youth. We subsequently learned more about youth-engaged evaluation, and aspects of this project morphed into a multi-year youth-led evaluation of a MHWB initiative. We noticed that our responsive CAE sometimes proved logistically demanding because we were coordinating with a number of people, across districts and with geographic dispersity. While having an evaluation team and stakeholders who were invested in a CAE and willing to follow through to realize use (Shulha et al., 2016) enabled the evaluation team to adjust as needed, we continue to experiment with processes and applications to make managing a CAE easier. Our responsive CAE enabled us to foster meaningful relationships (Shulha et al., 2016) and work toward developing transformative relationships within and across districts, as well as with community partners.

While CAE has strengths in terms of stakeholder involvement and responding to emerging opportunities, multiple stakeholders can also act as a limitation when ensuring that voices are heard and differing perspectives are respected. For example, our initial plan included a survey of students about the MHP role at the end of year 1, which would have provided robust data and increased integration opportunities; however, stakeholders held different priorities, which included amplifying the visibility of the MHP and seeking to de-stigmatize MHWB. Some stakeholders were concerned about survey fatigue and a perceived lack of opportunities for student engagement in MHWB activities and therefore did not support a survey. Guided by stakeholder needs and priorities, the evaluation team responded by agreeing to co-host “wellness days” to collect data from teachers and students to meet inquiry goals. Evaluation practice in dynamic conditions and complex environments requires the ability and willingness to adjust plans and respond to others as part of promoting evaluative thinking (Shulha et al., 2016).

CAEs that strive to meet the needs of funders and stakeholders run the risk of ever-expanding inquiry, resulting in scope creep (Roy & Searle, 2020). Complex projects are prone to scope creep, as “new opportunities, interesting ideas, undiscovered alternatives, and a wealth of other information emerges [sic] as the project...
progresses” (Kendrick, 2015, p. 52). Due to the methodological opportunities, MM evaluation may be particularly susceptible to scope creep when conducted as a CAE in a complex and dynamic environment. Within our CAE, scope creep was largely avoided by nurturing close working relationships where the pressure for enlarged priority setting and premature decision making were balanced by relationships focused on learning goals, project feasibility, and future scalability. The evaluation team recognizes that additional opportunities for collecting and mixing methods existed and were not pursued. In the practice of CAE and MM, there are always opportunities and limitations that must be identified and carefully considered.

LESSONS LEARNED

We offer an example of a CAE where integration of MM played a role in understanding, making decisions, and directing resources to address the complex problems of youth MHWB in education. The MHP project and our integration of MM in a CAE are not meant to offer a “solution” to addressing youth MHWB in schools; we recognize that different contexts require tailored solutions. Working with stakeholders and negotiating provincial, district, school, and individual priorities was challenging and rewarding. Practicing MM evaluation within a CAE allowed the evaluation team to recognize multiple perspectives, be attentive to different sources of evidence about the MHP role, and be intentional in responding to the project. While CAE does not prescribe a methodological orientation, we wonder if MM evaluation is not a necessary principle, to address a range of evaluation priorities that can be identified or may emerge in the context of complex evaluations. In this evaluation, the importance of MHWB supports heightened the need to ensure the comprehensiveness and credibility of our understanding, which was facilitated using MM evaluation.

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Rachael Smyth is a research associate and practicing speech language pathologist. She completed her PhD at Western University in health and rehabilitation sciences and continues to engage in evaluation work in school-based settings in Ontario.

Chantal Labonte is a PhD candidate in school and clinical child psychology at the University of Alberta. Her research focuses on conditions that allow for optimal cognitive development for children with neurodevelopmental disorders (autism, ADHD, intellectual disability).