



Hwb Gwybodaeth  
Knowledge Hub

# Evaluation toolkit

# CONTENTS

Introduction and acknowledgements	3
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## OVERVIEWS

Checklist to plan an evaluation	4
Self-evaluate engagement or commission an external agency	10
Involvement in evaluation	12
Evaluation ethics	13

## FACT SHEETS

Key terms within evaluation	2
What and when to evaluate	8
<b>Evaluation techniques:</b> Dealing with numbers without being a research expert	15
<b>Evaluation techniques:</b> Dealing with words in evaluations without being a research expert	17
Further resources and information	19

<b>Appendix 1:</b> Template evaluation participant consent form	20
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<b>Appendix 2:</b> Emerging practice example 1: deciding when to evaluate and reflecting on process to evaluate impact	21
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<b>Appendix 3:</b> Emerging practice example 2: film making to evaluate what matters to people with lived experience in engagement work	23
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<b>Appendix 4:</b> Emerging practice example 3: Evaluating the experience of co production in a social research project	24
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<b>Appendix 5:</b> Emerging practice example 4: Co-production in the design of evaluation; a tool for evaluating person centred care	25
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<b>Appendix 6:</b> Emerging practice example 5: Evaluation of the design and implementation of engagement principles	26
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# INTRODUCTION AND ACKNOWLEDGEMENTS

This guide to evaluation is designed to be used in its entirety or in bite size pieces. The reader can read the document to gain a step-by-step guide to the process of evaluation, or they can choose to solely focus upon factsheets, overviews or examples within the appendices.

The guide sits within a suite of refreshed resources, including the [National Principles for Public Engagement in Wales](#); developed collaboratively between public and third sector agencies, led by WCVA. The 10 National Principles for Public Engagement are a good practice guide to enable effective, ethical and meaningful engagement with the public and people that use services. They are straightforward standards to be used by professionals and practitioners in a range of settings, including but not limited to, government officials, policy makers, public administrators, bodies delivering services and engagement practitioners.

This evaluation guide provides straightforward information to enable practitioners within the public and third sectors in Wales to evaluate their work and it sits alongside the Evaluating Engagement toolkit. The toolkit provides straightforward specific guidance about how to evaluate engagement activities whilst this guide focuses upon all aspects of evaluation work.

Online searches for 'evaluation techniques will uncover a baffling array of frameworks, tools and instructions that can seem complex. Additionally, when looking for guidance on evaluation, it can be hard to find information that is not attached to a particular method, tool, change theory or aimed at a specific sector.

Evaluation should involve communities that have participated within projects or activities, but how it does this will vary according to the work at hand, the opportunities within the work and restrictions and limitations of the project being evaluated.

## Acknowledgements

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# FACT SHEET: KEY TERMS WITHIN EVALUATION



The following key terms specifically relate to evaluation or are repeated to save the reader excessive cross referencing between the suite of documents.

**Analysis** – the process of bringing the information you have collected to understand what it means.

**Codes** – a way of organising information you have collected for analysis. Codes help you to look at similar information from different people. An example code might be ‘skills’, so you could organise all the answers that people gave which refer to skills under the same code, to try to find out if there are common threads.

**Co-evaluation** – a process of evaluating that ensures that the people who have experienced a piece of work are fully included and involved in evaluating how that piece of work went, including sharing power and decision making.

**Consultation** – a formal, usually short lived, task whereby policy makers or service delivery agencies ask groups of interested people about their views and opinions on set topics and plans that are being made.

**Co-production** – an approach, ethos and culture whereby people who provide and deliver services work in equal partnership, share power and decision making with people who are using those services to reach effective long-lasting solutions.

**Engagement** – an active process that enables people who use services or are affected by decisions made by services or policy makers are invited to take part in development, delivery or review. The process of engagement can span various methods including consultation, involvement and co-production.

**Ethics** – the process of ensuring that your evaluation is safe and minimises harm.

**Fieldwork** – the work that is carried out in collecting the data, or in other words when you are gathering the answers to your questions.

**Informed consent** – the practice of ensuring that participants understand what they are getting involved in and agree to take part. They should not feel under pressure to agree, and they can end their participation at any point.

**Involvement** – working with people who use services or are affected by decisions, so they are included in planning, sharing their opinions and experiences, to develop more effective services and inform decision making.

**Mixed methods** – using both quantitative and qualitative methods within an evaluation. An example might be that you use a percentage from answers to your online survey, and a quote from an interview to explain the percentage.

**Participants** – the people who take part in your evaluation.

**Participation** – a process whereby communities are participating in shaping services and informing decisions, but they are not sharing power.

**Primary data** – information you collect yourself for your evaluation. For example, the answers participants gave to the questions you created for a questionnaire.

**Secondary data** – information that is already available from other sources that you use for your evaluation. For example, statistics on rates of engagement in Wales, annual reports or minutes of a meeting.

**Stakeholders** – different communities (geographical, disparate and/ or work practice) that have an invested interest in a service or decision.

**Qualitative methods** – methods of collecting more in-depth information usually related to words or pictures. Results would be displayed in quotes, or drawings people used to explain their answers. An example would be an interview which involved open questions and asked people to explain what their experiences were of taking part.

**Quantitative methods** – methods of collecting information which are counted as numbers. Results would be displayed in graphs or charts, or as percentages. Examples could be the percentage of people who clicked on yes to answer a question, or the numbers of people who attended a session.

# CHECKLISTS TO PLAN AN EVALUATION PROCESS

These steps do not advocate one framework but offer a practical guide of things to consider and plan. Timetable all the steps before embarking on your evaluation, this will help you manage timescales and staff effectively and help you involve participants meaningfully.



## Checklist part A: Thinking things through

1

### Have you listed your reasons for evaluating your work?

List all the statutory obligations, funder requirements, accountability to participants and other reasons you need to evaluate.

2

### Have you identified exactly what you are evaluating?

Be clear about what you are evaluating and revisit this regularly to make sure you stay on track.

3

### Have you made a list of who you are going to involve?

Best practice would be to involve a range of stakeholders who were involved: from the project team, stakeholder groups you engaged with, partners you involved and the funders or commissioners. This would ensure you gain insights from a range of perspectives.



## Checklist part B: Planning

1

### Have you got specific questions to ask?

Using the answers to checklist part A, particularly your criteria for 'what are you evaluating', formulate questions that you want to ask the people who are going to be involved. Make the questions specific rather than vague 'what worked/ what didn't work' questions.

2

### Have you chosen your methods?

Match the methods you will use to the questions you want to ask and the people you are asking. The '**Fact Sheet: Evaluation techniques – dealing with numbers without being a research expert**' and '**Fact Sheet: Evaluation techniques – dealing with words in evaluation without being a research expert**' will help you to decide which methods are best to use to answer your questions.

3

**Have you prepared any ethical procedures you may need?**

Make sure you have minimised harm and maximised benefits through asking emotionally safe questions and having procedures for things like safeguarding, confidentiality, informed consent, whistleblowing, and safe storage of information. The **'Overview: Evaluation ethics'** will help you think through the different ethical considerations.

4

**Have you made a week-by-week evaluation timetable?**

Work out how long the different stages and activities will take and schedule them into a week-by-week timetable. Always allow for more time than you think you will need as it takes some time for people to respond to evaluations, and analysis and writing up can often be a longer process than imagined. A rough guideline is to allocate up to a third of your time to planning and design, a third doing fieldwork, and a third for analysis and write-up.

5

**Have you got a plan for recruiting stakeholders to participate?**

Map out key contacts. Make sure people taking part understand what it involves and don't feel pressured into saying yes. Develop your ethical protocols using the **'Overview: Evaluation ethics'** use the informed consent template in Appendix 1 to create your own.

**Checklist part C:  
Going out and doing it**

1

**Have you got venues?**

Book these in advance, and make sure they are accessible and appropriate for your methods. If you are using creative methods, you might need a bigger space. Face-to-face interviews will probably require quiet rooms away from distraction. Try to limit issues like transport barriers.

2

**Do you have participants and support?**

Ensure that people have confirmed they are attending evaluation events or that they are available to undertake interviews or complete surveys. If undertaking a survey or questionnaire, make sure you have alerted participants to your evaluation before sending them a link or questions. In terms of evaluation workload, make sure you have enough people in your team to do all the face-to-face activities you have planned. Consider matching skill sets to activities and tasks.

3

**Have you considered data protection rights and safe information?**

Think through how you are going to record the information and store it safely, particularly if using voice recorders or cameras. Make sure that the place you are storing information is password protected and that hard copies of information are scanned and safely destroyed or kept in a locked filing cabinet.

3

**Have you made a 'resources I need' list?**

Have everything you need in place before you go out to meet people. If you are using creative methods, it might be that you need art materials or toys, if undertaking a survey you may need to learn a software programme.

4

**Have you scheduled debriefs?**

After involvement events or at the close of a survey, allow time for evaluation team meetings. If it is a solo evaluation, ensure you have someone you can talk to who can help and guide you through it.



## Checklist part D: Understanding what you have found out and what it means

1

**Have you allowed enough analysis and write up time?**

Make sure you have enough time factored in for looking at the information you have collected and what it means.

2

**Have you answered your 'what to evaluate' and 'why evaluate' questions?**

Go back to the questions you wrote in Part A of this checklist and make sure you have answers or can clearly identify what you have not found out.

3

**Have you identified your analysis technique?**

Use the analysis sub sections on '**Fact sheet: dealing with numbers**' and '**Fact sheet: dealing with words**' to identify how to analyse.



## Checklist part E: Telling others what you have found out

1

**Have you identified the people who need to hear your findings?**

Make a specific list of elected members, organisations and key people that need to know what your evaluation found.

2

**How will you tell them what you have found through your evaluation?**

Make sure you go back to the people who were involved to tell them what you found out in a way that they can understand.

3

**Are the methods and information of sharing findings accessible?**

Think about accessibility needs, and how to make your findings stand out, but easy to understand using summaries, infographics and informal events.

# FACTSHEET: WHAT AND WHEN TO EVALUATE



## What to evaluate

There are a range of evaluation models. Rather than advocate one model, this factsheet touches on different types of evaluations. When engaging in any evaluation it is important to think about what value you are evaluating.

Referring to the emerging practice examples in Appendices 2-6 may help to establish what you are evaluating. Funders may want to see outputs, participants will want to talk about experience, and organisations and funders will often want to know what impact the work has had and what can be learnt.

None of these are more important than another, and participants' perspectives should not be overlooked. To help separate these different interests and ensure that an evaluation has clear focus, you can work to three different criteria:



### Goals – did you achieve the project outputs?

#### For example:

Who did your work engage, was it who was intended?  
What tasks and goals have you undertaken and how many times?  
Have you met any project indicators?



### Process – what mechanisms were used to deliver the work?

#### For example:

How were communities involved?  
What project activities were most successful and how do you know?  
Did your processes enable project participants to be heard?  
What do they feel was the quality of your work with them?



### Outcomes – what has been the impact?

#### For example:

Have community members become more confident and how do you know?  
What are they going to go on and do?  
What learning has there been for the organisation?  
Are there examples of emerging practice?

## When to evaluate

You can evaluate either as you deliver your engagement work or towards the end of your work.

## Formative evaluation

A formative evaluation means that you stop and take stock as the engagement work is developing. A formative evaluation uses feedback from all stages of the work process to track how well your work is going and enables you to change your activities or approach if needed. Appendices 2 and 6 give examples of formative evaluations.

## Summative evaluation

A summative evaluation is when you wait until the end of the engagement work and evaluate goals, process and/or outcomes once the work has finished. You can still use feedback gained from community members, but it informs 'lessons learnt' rather than informing the development of the involvement process itself. Appendices 3 and 4 offer examples of summative evaluations.

Once you have established when you are conducting your evaluation and which specific goals, processes and outcomes you want to find out about, you are ready to design your evaluation. It is not possible to evaluate everything but being clear about the parameters of the work and what is important to the different stakeholders will ensure your evaluation is balanced and contains different voices.

# SELF-EVALUATE ENGAGEMENT OR COMMISSION AN EXTERNAL AGENCY?

'**Self-evaluation**' refers to undertaking an evaluation yourself, so you are evaluating your own work.

An '**Independent evaluation**' refers to your work being evaluated by an outside agency.

For an independent evaluation to be truly objective and independent from service delivery, the funding for the evaluation needs to be separated from the organisation who has been undertaking the work. This is often hard to achieve within many funding sources.

So many evaluations are a hybrid approach whereby an external agency with evaluation expertise is commissioned to oversee the process and undertake primary fieldwork. Still, they work in partnership with the organisation that has delivered the work. This can include using information they have already gathered as secondary data, such as numbers of participants, participant feedback and minutes of meetings.



### Advantages to self-evaluation

- Your day-to-day delivery work can easily link to your evaluation work. If you are undertaking a formative evaluation, findings from the evaluation can be fitted easily into delivery processes.
- Participants will know the workers already and therefore good team dynamics exist.



### Disadvantages to self-evaluation

- The evaluation work can become mixed up with the delivery work, confusing work programmes and a lack of clarity in evaluation findings.
- Non-researchers can find analysing data difficult and underestimate the time it takes to do thoroughly.
- It is not possible to be objective when you are evaluating your own work. You may feel that what you saw is not what participants say happened.
- Participants may not want to upset you and therefore may answer your questions according to what they think you want to hear.



### Advantages to independent evaluation

- The separation between work and evaluation is clear and adds to objectivity. This means that the findings are more likely to be valid.
- All participants can freely talk about experiences without worry of upsetting feelings or changing personal relationships.
- An evaluator is an expert in managing data and therefore has the skills needed to manage analysis and other more complex aspects of evaluation.



### Disadvantages to independent evaluation

- It takes time to recruit an external evaluator and get the evaluation started.
- There can be distance between project participants and the evaluator.
- Time needs to be spent developing a positive partnership with an external evaluator and establishing decision-making and involvement processes.

The global organisation, '[Better evaluation](#)' provides a useful overview on objectivity and management of evaluations.

# INVOLVEMENT IN EVALUATION

There are different ways in which communities can be involved within an evaluation and there are [existing standards for public involvement in research](#). Health and Care Research Wales has an [academic example of a booklet](#) of the kind of information people need before getting involved in research or evaluation.

The Co-production Network for Wales have produced an audio knowledge resource about [co production and evaluation](#) featuring Alain Thomas, an expert in participatory evaluation and public engagement.

Co-evaluation should follow the National Principles for Public Engagement and involve shared decision-making between the evaluators and participants. However, Co-evaluation does not mean that everyone must do every role.

## Create a steering or reference group

These are groups that guide the direction of a project, consisting of experts who can act as a critical friend. There should be enough community members to avoid tokenism, outreach to seldom heard communities, and the use of accessible processes and meeting times. Appendix 5 offers an example of working with a group for co-design of an evaluation tool.

## Include lived experience evaluators within the team

Community members who have experience of a project, intervention or particular social experience are referred to as 'lived experienced'. They can be included in the evaluation team and undertake a full evaluator role. If working with lived experienced evaluators, ensure that you have considered payment and training.

## Use a variety of methods to engage participants

All evaluations will require some engagement of participants. This may vary from completing a survey to participating within an interview or focus group. Appendix 3 offers an example of how to use film and Appendix 4 using interviews as conversation.

## Co-disseminators

Community members who have been involved can disseminate the findings of an evaluation alongside the evaluators. This can be particularly useful if there is an event, or a video made of the engagement work that was undertaken. Appendix 3 offers an example of filmmaking for evaluation.

# EVALUATION ETHICS

Some project work will cover ethics such as consent to participate, data protection, confidentiality and safeguarding. But some work will not include these issues and therefore your evaluation will need to contain some ethical procedures.

## Data protection

The Data Protection Act 2018 is the UK's implementation of the General Data Protection Regulation (GDPR). If you hold personal, identifying information about individuals you must let them know what information you are holding, how you are holding it and what you will be doing with it. For an evaluation there are ways of ensuring anonymity such as collecting ward area, village or town rather than address, coding names so real names are not used, age rather than date of birth etc. Further guidance is available from <https://www.gov.uk/data-protection>

## Safeguarding

There should always be procedures to ensure the protection of vulnerable adults, children and young people within an evaluation. Exploring people's experiences gives space for disclosures of abuse and therefore procedures should include a named safeguarding lead, procedures for diverting disclosure to peers if working within a group setting and a proviso when gathering informed consent that lets participants know that if someone is being harmed action will have to be taken.

Safeguarding in an evaluation context is no different to safeguarding in other contexts, but if interested, [more about safeguarding in research](#) is available from the National Institute for Health and Care Research.

## Whistleblowing

Listening to people's stories and experiences may uncover aspects of poor practice within your own, or a partner, organisation. Having procedures ready will enable clear action to

report malpractice. Your organisation should have existing policies and [Audit Wales](#) and [WCVA](#) have produced useful guides about this topic.

## Hate crime reporting

If disclosure of hate crime arises during evaluation, evaluators should act. The national third party hate crime reporting centre is run by victim support and [more information about hate crime reporting](#) is available from them.

## Informed consent

If participants have not consented to evaluation at the same time as consenting to be a part of the project or service, evaluators should specifically inform them about what the evaluation is for and gain their written consent to be a part of the evaluation. A consent form varies between institutions, but at its' most basic should include a description of what the evaluation will entail, what topics and themes you will ask participants to discuss, an explanation of data protection rights, an explanation of what will be done with the information they give, and an express declaration that they can withdraw their participation or/ and information at any point. This should all be signed and dated. A consent form template is available in Appendix 1.

## Ethics for working with co-evaluators

If your evaluation of engagement includes participants as co-evaluators you should also consider how you are going to compensate or remunerate participants' time, what training they may need or want and what level of project and pastoral management they need.



# FACT SHEET: EVALUATION TECHNIQUE – DEALING WITH NUMBERS WITHOUT BEING A RESEARCH EXPERT

Referred to as 'quantitative', using numbers helps to answer questions such as 'how many' and 'how much' and numerical information can also be used to evaluate goals/ outputs, processes and outcomes.

1

To report outputs (e.g. how many reports, numbers at a dissemination event, how many dissemination events) it is necessary to carefully monitor numbers as you progress through your work so outputs can be calculated at the end of the work.

2

To report processes (e.g. number of sessions, how many participants have engaged in different tasks) and the demographics of participants (e.g. age ranges and other identities) you need to set up a monitoring system that records these details for each task within the work at hand. This then means you can add numbers together to get final details about how many sessions you delivered and who participated within what. Think about how you will record the number of participants if you have repeat attenders, how to measure outreach work where you may not have engaged anyone and identify where you may encounter numerical inconsistencies in your monitoring.

3

To report outcomes numerically, you need to find out about opinions and there are 3 main ways of doing this using numbers:

- a. Ask questions that can only be answered with a yes or no and see how many participants reply 'yes' and how many reply 'no'.
- b. Ask a scaling question, the easiest of which is a Likert Scale. This involves having a statement and asking participants to rate the extent to which they agree with the statement.
- c. Measure the difference the work has made by asking participants to score certain criteria (such as confidence) before the work and then again after the work. By comparing the initial score with the later score, the evaluator gains an indication of whether the work has helped to increase participants' well-being or skills.

You don't have to be an expert in using numbers to understand what you have found out. There are now many different software packages out there that you can use, which do a lot of the analysis for you as well. This means they compile the answers into diagrams, charts or tables. Many of them you can use for free or sign up to a free trial. You can also pay for access to more content or functionality. These software packages can present the answers to your questions in easy-to-understand charts and tables, most can also create word clouds, so you can see which words are most popular. Below are a few commonly used packages:

**Survey Monkey:** this software allows you to create online questionnaires and share links with people to answer your questions. Survey Monkey also allows you to use pictures or videos to make questions more accessible and engaging.

<https://www.surveymonkey.com/>

**Microsoft Forms:** like Survey Monkey, Microsoft Forms allows you to create online questionnaires and share links with people to answer your questions.

<https://forms.office.com/>

**Mentimeter:** Mentimeter is a software which allows you to share the answers to your questions live, as you collect them. You can use Mentimeter to turn your questionnaire into an interactive game.

<https://www.mentimeter.com/>

An evaluation should also collect participants information such as age range, gender, protected characteristics and the area they live in. This helps you to see who you are engaging well and where you have gaps. It is particularly important for ensuring you are working with people who are seldom heard.

You may have already gathered some numerical information while doing your work. This can be used for an evaluation as 'secondary data'. Although it already exists, it can be compiled with other numbers, compared or just used to explain goals or outputs, processes and outcomes.

You can do a 'mixed method' evaluation through using some numerical data gathering and some qualitative, narrative data gathering.



# FACT SHEET: DEALING WITH WORDS IN EVALUATIONS WITHOUT BEING A RESEARCH EXPERT

Referred to as 'qualitative', finding out what people think and hearing their experience will help you answer questions about 'meaning' such as 'what kind of impact did our work have on participants?' and 'what did participants particularly enjoy and why?' While we are used to working with words in day-to-day life, there are some things to be aware of to ensure you ask the right things in the right way when undertaking an evaluation. This section looks at word-based methods of evaluation before explaining how to analyse them.

## Undertaking interviews

An interview should feel informal and like a conversation. You should have some pre-prepared questions to ask participants that directly correspond with the 'What am I evaluating' and 'why am I evaluating' questions. The Open University offers more [detailed information](#) about different types of interviews and things to think about. You should also think about how you are recording the details of what you are told- an audio recording can be taken and transcribed using Microsoft Teams, word or YouTube subtitles, but be aware of how packages may transcribe with big errors. If you transcribe scripts yourself, it is very time consuming. Some people can type whilst people talk, and others will take written notes. Make sure you record as much as possible, not just what you feel are the most important points.

## Facilitating focus groups

A focus group consists of set questions being asked to a group of participants and facilitating conversation between them about the topics of the set questions. A good focus group involves clear objectives, a diverse and comfortable group of 6-10 participants, a skilled facilitator, open-ended and unbiased questions in a logical flow, and a safe, confidential environment. The primary aim is to gather in-depth insights through group interactions, not to produce generalizable data.

## Using creative methods

Many people express themselves in several ways and some communities may find it easier to use creative techniques to explain their experiences. [Most Significant Change](#) is a method that enables high levels of participation within evaluation and a framework for analysing the information.

## Analysing words

It can be hard to know what to do with pages of stories or thoughts. Some computer packages help to 'code' words (e.g. Nvivo) but non research experts can find these hard to use. Some researchers are experimenting with AI, although the accuracy of this method is dependent upon researcher skill and familiarity with the tools. There are several academic guides to undertaking thematic analysis. This section offers a step-by-step overview, but we recommend learning more about how to code and theme data before undertaking the task.

The easiest way to manage this information is to break it into the following steps:

1

Be familiar with the scripts. While you may think you know what people have said you will have hidden assumptions and naturally forget aspects of dialogue. Take time to thoroughly read each script.

2

Code your data. Break down each interview or focus group script into small, clearly distinguishable categories. Some researchers use colour to distinguish between small categories, keeping a key so they know which colour refers to which category. An example of two categories might be 'gained self-esteem from supporting peers' and 'gained self-esteem from learning something new / being challenged'.

3

Once you have all your narrative data coded into categories look at how they fit together and create large themes. Using the two examples, one large theme would be 'increase in self-esteem'.

4

Compare your analysis between different types of participants. For example, do partner agencies think differently to your community member participants? Are there differences in experience according to age or areas?

5

Once you have themes, subcategories and comparison differences you can work out a logical order in which to present your information. Your large themes may overlap with the project outcomes you set. If so, distinguish between outcomes you set out to achieve and outcomes that have been unexpected.

You may have gathered people's stories or case studies as a part of your work. You can use information from these, alongside information within any existing reports or meeting minutes as 'secondary data' to accompany your qualitative analysis. You can do a 'mixed method' evaluation through using qualitative, narrative data gathering and some numerical data gathering.



## FACT SHEET: FURTHER RESOURCES AND INFORMATION

This section offers a selection of more general overviews regarding evaluation that may help the reader to undertake their own evaluation.

New Philanthropy Capital aim to support the UK third sector and hold some resources to support evaluation practice.

<https://www.thinknpc.org/categories/impact-measurement-evaluation-and-data/>

The Economic and Social Research Council's National Centre for Research Methods holds a range of in depth, academic information about different research methods.

<https://www.ncrm.ac.uk/resources/online/>

Better Evaluation are a global community aiming to support good evaluation practice. Whilst mainly complex and quantitative their guidelines for ethical evaluation are useful.

<https://www.publicengagement.ac.uk/do-engagement/evaluating-public-engagement>

Whilst predominantly focusing upon co production with reference to English legislation, this guide does contain a useful section on review and evaluation of coproduction work.

<https://www.scie.org.uk/co-production/what-how>

Better Evaluations support improvements in evaluation practice internationally.

<https://www.betterevaluation.org/>

There are a range of resources and support for members from the Co production Network for Wales, including involvement and evaluation. <https://copronet.wales/>  
<https://info.copronet.wales/measuring-what-matters/>

# APPENDIX 1: TEMPLATE EVALUATION PARTICIPANT CONSENT FORM



PUT ORGANISATION LOGOS/ INFORMATION AT THE TOP HERE



## Consent form to participate in the **NAME OF PROJECT** 'evaluation

- I have heard an explanation of the evaluation and know that it will involve SPECIFY EXACTLY WHAT.
- I know that I can choose to participate and stop at any time.
- I am happy to be INTERVIEWED/ TAKE PART IN ADVISORY GROUPS/ FOCUS GROUPS/ OTHER ACTIVITIES AND KNOW WHAT EACH OF THESE ACTIVITIES WILL INVOLVE
- I know that the report will be anonymous, and the work will be confidential unless evaluators are worried there are safeguarding issues or bad practice.
- I know that only the evaluation team will be able to see my name and limited personal information like my AGE/ COMMUNITY WHERE I LIVE? ANYTHING ELSE
- I know that what I say will be stored safely. Data protection rights will not be broken.

Signature (typed is fine):

\_\_\_\_\_

Date:

\_\_\_\_\_



## APPENDIX 2:

# EMERGING PRACTICE EXAMPLE 1: DECIDING WHEN TO EVALUATE AND REFLECTING ON PROCESS TO EVALUATE IMPACT

The following example from Cardiff and Vale University Health Board is short because, at the time of writing, they are at the start of the evaluation process.

'We work together in Cardiff and Vale UHB with the wider community and have developed a flourishing **co-production group** sharing a vision to transform health, well-being and experience for those living with long-term conditions. Our 300 members have formed 8 smaller co-production groups, utilising co-productive methodology. Our forum is demonstrating impact on two fronts, culture and connection. We are evaluating our impact on both aspects through exploring our co-productive journey over the last 18 months and we hope to discover more with a structured evaluation pending.'

Some co-produced successes include:

- **Stepping Stones:** a co-produced toolkit to support self-management.
- **Waiting Well Charter of Expectations** adopted by Welsh Government, 'The 3 Ps Policy for Pro-active Waiting' demonstrating impact at national level.
- **Peer volunteer role and training programme** being piloted across sectors
- **Keeping Me Well web pages:** ME/CFS, FND, Menopause, Endometriosis, improving access to information and self-management support.
- **Living Well with Long-term Conditions Service** currently being co-designed - workshops on remit, success, the clinical model, and awareness raising.

## Learning points for undertaking evaluations of engagement work

1. It shows a decision to undertake a formative evaluation of the impact of their engagement work. The co-production group they have is on-going rather than a project with an end. They therefore decided at a certain point in time to undertake an evaluation.
2. They have identified which parts of their work to evaluate (described above as the list of successful projects and associated links.)
3. They have identified what to evaluate – the engagement processes that have enabled these project successes and the impact of these processes upon participants.
4. They are using monitoring information about the engagement work that has demonstrated impact to inform the evaluation's purpose.
5. Whilst the evaluation itself is in its' infancy, these decisions are crucial prior to embarking on evaluation work.

### Co-Production in Action



People regularly contributing



People on our mailing list



Co-production Forums Held



Interest Groups Established



### Connected and Strengthened Communities





## APPENDIX 3:

# EMERGING PRACTICE EXAMPLE 1: DECIDING WHEN TO EVALUATE AND REFLECTING ON PROCESS TO EVALUATE IMPACT

The Cardiff and Vale Regional Partnership Board (RPB) aims to improve the health and well-being of the population and improve how health and care services are delivered by making sure people get the right support, at the right time, in the right place. You can [find out more](#) about our [engagement work](#). We have been working on a series of films called 'my voice matters' to help us understand what matters most to people when engaging with them. To do this, we worked with C3SC and ProMo Cymru and will soon be releasing some coproduced short films that have been created with Cardiff and Vale University Health Board's Youth Groups and People First Groups in Cardiff and the Vale of Glamorgan. ProMo Cymru met with the groups before filming to agree questions and the overall approach.

These films build upon the approach we took in a [case study film](#) about the co production experience of Jackie Askey, who cared for her husband and was involved with the Dementia care learning scheme.

### Learning points from this evaluation

1. There is incremental learning from making films for evaluations. They started with a case study approach and used learning from that to implement a wider approach.
2. The RPB is using the findings to develop practice. The RBP recognised that 'being able to hear people's voices and understand engagement from their point of view has helped us improve the way we communicate and engage.'
3. This is an example of using creative, accessible evaluation method. Written words are not the only way to report on evaluation findings and films enable involvement through each part of the film making process.



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# APPENDIX 4: EMERGING PRACTICE EXAMPLE 3: EVALUATING THE EXPERIENCE OF CO PRODUCTION IN A SOCIAL RESEARCH PROJECT

**St Giles Trust Cymru** is a charity that helps people who have been held back by poverty, unemployment, the criminal justice system, abuse, exploitation and homelessness to build their positive future. It has lived experience volunteer and paid opportunities that enables peer support, alongside personal and career development.

They commissioned **C.A.R.P. Collaborations**, a social enterprise that undertakes participatory and co-produced research and evaluations, to undertake qualitative research exploring employer attitudes to offering volunteering opportunities and unpaid work placements to people with lived experiences. The research team included lived experience researchers. Both organisations wanted to evaluate the co-researchers' experiences to aid organisational learning.

The two organisations respectively undertook informal, conversational interviews with each lived experience researcher to find out about what they felt they had learnt, how supported they had felt and where the process of employing lived experience researchers needed to be improved. Through having an unstructured interview, lived experience researchers could raise their own discussion topics.

The organisations had an end of project meeting which included sharing learning and reflecting upon the collaboration process. The evaluation was included as an appendix of the research report. We learnt that aspects of the research process can be frustrating due to time lapses and sudden concentrated fieldwork. We found out that lived experience researchers valued having tailored one to one support when learning research skills and being offered flexibility in terms of which elements of the research they wanted to be involved with.

## Learning points for undertaking evaluations

1. The evaluation was led by the organisations, but had a participatory approach to enable involvement.
2. The criteria were clearly set about what to evaluate and why.
3. The findings can easily be used to develop practice.



**St Giles** CYMRU

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Turning a past into a future



## APPENDIX 5:

# EMERGING PRACTICE EXAMPLE 4: CO PRODUCTION IN THE DESIGN OF EVALUATION; A TOOL FOR EVALUATING PERSON CENTRED CARE

The Co-production Network for Wales worked with people who had lived experience of care to develop an evaluation tool. The 'Percci' tool enables care providers and the people they support to analyse the quality of care that is being received and how it is experienced. Since the tool's development included people with lived experience of care, it enables evaluation of quality of care to be more effective and relevant and the process of evaluation to be accessible to people receiving care services. <https://info.copronet.wales/measuring-person-centred-care-a-simple-co-produced-tool/>

### Learning points about undertaking evaluations

1. It is possible to involve people within evaluation design without them being involved in all aspects of the evaluation. This is particularly important when evaluating personal circumstances such as social care, medical care or housing support.
2. Involving people in design enables co production within quantitative evaluations which is often perceived to be a difficult task to achieve.
3. Involvement in design has an impact upon effectiveness and accessibility of the evaluation process.



## APPENDIX 5:

# EMERGING PRACTICE EXAMPLE 5: EVALUATION OF THE DEVELOPMENT AND IMPLEMENTATION OF ENGAGEMENT PRINCIPLES

Tai Pawb (housing for all) is a registered charity and a company limited by guarantee. We imagine and **campaign** for a Wales where everyone has the right to a good home, promoting equality and diversity in housing. Tai Pawb also provides practical advice and assistance to its members, including the equality and diversity accreditation for the housing sector.

Tai Pawb has increasingly undertaken lived experience engagement across various pieces of work and projects, including with refugees, asylum seekers and people with no recourse to public funding, research projects and private rental sector tenants. We wanted to build on this work, so it was more ingrained and had a more detailed approach so we co-developed principles for how we will work with people with lived experiences. The principles were tested with participants in some of our projects and staff at a partner organisation and adapted where needed. This provided reassurance that we were working in the right area.

We learnt that it's important to reflect on how we do things, not just what we do. We also recognise that this area is an ongoing learning experience, and it's important to regularly reflect, refine and improve.

### Learning points for undertaking evaluations

1. Testing principles or ways of working is an example of a formative evaluation. The findings feed into the work being undertaken and there will be continual reviews.
2. Evaluating co-development is a good way of making sure that your engagement work is relevant to all people who shared a particular lived experience, rather than being only relevant to one section of the community.



promoting equality in housing  
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