



A Note on Evaluation

Part of The Meaningful Engagement Toolbox by Collective Threads Initiative

My dream movement would grow and change over time and be open to learning and unlearning.

- Collective Threads Initiative Co-Creation Partners

We measure what we value. While organisations may be expected to also measure things based on funder requirements, beyond those constraints **evaluation can provide a systematic process for measuring meaningful engagement with [people with lived experience](#) over time.**

Evaluating your organisation's lived experience engagement strengths and areas for growth will help you assess how you are doing, determine a plan for continuous quality improvement, and track your progress over time. Organisations can evaluate their programmes by tracking progress on "indicators," which are measurable categories that indicate your strength or weakness in a given area. We assess how an organisation is doing on any one indicator by developing an "instrument" (a survey, for example) that asks about each indicator. In the survey itself, there are questions that are meant to measure each indicator (or components of the indicator).

Organisations can use the instrument to assess how they are doing and what still needs to be done. "Data analysis" means looking at the survey responses thoughtfully in a structured way to see "trends"¹ and findings that can be used to make decisions. Analysis typically also includes suggestions or a protocol for prioritising needs and developing an action plan for improvement of current services based on the data, and then the action plan is implemented. After a period of time to allow for meaningful work on the action plan, the assessment will be repeated so that progress can be tracked and a new action plan for the next steps can be developed. This repeating process of **assessment** → **analysis** → **action plan** → **improvement** is often referred to as "continuous quality improvement" or CQI.

[Evaluation](#) is often viewed by organisations as either a funder chore ("We do this to keep getting funded so we must look good to our funders") or a scary task ("What if we don't score well? Does that mean we're bad at our work?"). In reality, your "score" is less important than what you do with the results of the assessment. The scores on the assessments and averages in your analysis do not tell you whether or not you are succeeding or failing, or whether or not you should be proud or ashamed. Rather, they give you information that you can use to have a more impactful strategy. The goal is not to compare yourself with other organisations – "Who scored

¹ "Trends" in this case does not mean something is trendy or fashionable. It means that the data from responses show that multiple people or groups of people reported something similar.

higher? Does that mean they're better than us?" The goal is to evaluate your own organisation, identify and prioritise follow-up actions, and develop a strategy for implementing changes. This is continuous quality improvement, and demonstrating a commitment to CQI speaks volumes about the intentions of your work!

Often, organisations or their staff may view data collection as something that is done primarily to appease funders and stay in grant compliance. When done well and thoughtfully, data collection and analysis for CQI can be one of the most valuable and essential processes an organisation can engage in. It is important to incorporate evaluation into your budgets, staffing capacity, and timelines when developing funding processes.

Our repository includes a series of surveys and analysis tools you may use to track and evaluate your progress at continually increasing your level of effective, meaningful engagement of people with lived experience in your work. **Not all tools will be appropriate or effective for your particular organisation.** Just as you likely wouldn't need to use every tool in your toolbox to build a piece of furniture, you don't have to use every tool in our toolbox.

Low on time or capacity for implementing a full evaluation?

At the simplest level, an organisation could start working through these surveys as a checklist to increase their level of meaningful lived experience engagement, before even beginning to use it for evaluation. The benefit to conducting a "baseline" or initial survey is that you can then measure (and report) your improvement!

Who should we survey?

This will differ from one organisation to the next. Consult with a programme evaluator or technical assistance provider for detailed assistance in developing an [evaluation](#) plan that works for your organisation. If capacity allows, survey all staff, including frontline staff, leadership, and contractors. Larger, more established organisations can use the full survey while smaller, grassroots, or newer organisations can use the abbreviated survey. If capacity is low or the organisation is large enough to make a full-staff survey unrealistic, the survey should include executive leadership, representatives from HR, programme managers, frontline staff, and contractors, with an emphasis on including those who have disclosed lived experience.

New organisations can use the survey as a guide for creating sustainable, ethical, powerful lived experience engagement as a foundational part of their organisation.

A few relevant considerations:

If the survey is completed only by members of the leadership team, or only by your human resources staff, you will have an incomplete picture of your organisation. Especially as organisations move towards fine-tuning their work at the *Involve*, *Collaborate*, and *Empower* levels, having a broad picture of how different departments and levels of the organisation view the work is critical. If capacity allows, consider having surveys completed by multiple staff from different departments or levels in the organisation. Regular contractors, frontline staff, human resources, directors, and middle management may all provide different insights. Calculate percentages based on averages. Note any trends you observe among different departments or levels.

Have a representative sample of your recipients/stakeholders complete the Participant/Client Ladder. If their perceptions and scores differ considerably from your staff's in any area, this is an opportunity for further exploration and development within the organisation.

Programme and organisational evaluation are new to us. Where can we learn more?

For introductory information about programme evaluation, see:

[The Basic Principles of Program Evaluation by Nonprofit New York](#)

[A Framework for Program Evaluation: A Gateway to Tools from Community Toolbox](#)

[Introduction to Program Evaluation for Public Health Programs: A Self-Study Guide by the U.S. Centers for Disease Control](#)

For more information about how to use equitable evaluation practices to ensure your evaluation methods do not unintentionally replicate problematic power dynamics and bias, see:

[The Equitable Evaluation Initiative](#)

[Full Frame Initiative's Tradeoffs Analysis Tool](#)

[African Evaluator's Association](#)

For more resources about planning and decision-making:

[Decision-Making with Pros, Cons, and Mitigations](#) from The Management Center

Using the Surveys

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Paper vs. electronic

We have provided a series of tools that can be easily adapted into online surveys if your organisation has the funding and ability to digitize and transfer them to an online platform. Online surveys may allow easier visualisation and mathematical analysis. Simple surveys can be done with Google Forms, and services like Survey Monkey allow for analysis that is somewhat more complex. Software like Qualtrics allows for complex analysis but requires both a greater financial investment and specific training and onboarding to use it.² Remember: there is no reason to make this more extensive or complex complicated than you need or have the capacity to implement. We have given you everything you need in this toolbox to make an impact on how your organisation shows up.

Reminder: Not all organisations are working in areas where internet access is reliable or widely available, and different people (including staff, consultants, [subject matter experts](#), and programme/project participants) have different levels of comfort with online programmes.

Do we need to use the full survey in order to get useful results?

No. The Quick Start Guide available on our website includes examples of adaptation for partial use.

Demographics

When administering this survey, you may wish to collect additional demographic information that is not included in it. This will allow you to disaggregate the data, which means breaking down large, general categories into more specific sub-groups or categories, thereby allowing for a deeper understanding of trends, inequalities, and disparities among people with different identifies or experiences. If you can ensure the confidentiality of the responses, consider including whether or not someone has lived experience of [human trafficking](#) in your collected demographics so that you can compare answers between staff with lived experience of trafficking and staff without it.

² Organisations with lower budgets may consider partnering with a local educational institution to see if you can use their Qualtrics for relevant work. When this is considered, make sure you have a plan for confidentiality of data and transparent criteria for how and when it will be used.

Analysing the Results

External Analysis

Consider having an external programme evaluator collect and analyse your results to ensure the confidentiality of all information collected.

Analysis Tools and instructions

All instructions and tools for analysis are available in The Meaningful Engagement Toolbox found at www.collectivethreads.org. Begin with Analysis Tools for the Lived Experience Inclusion Ladder Survey.



Questions or ideas? Reach out to us at meaningfulengagement@collectivethreads.org or review the other documents in our Meaningful Engagement Toolbox at collectivethreads.org/meaningfulengagement.