Analysis Tools for the Lived Experience Inclusion Ladder Survey

Part of The Meaningful Engagement Toolbox by Collective Threads Initiative

This document is part of the toolbox that accompanies *The Meaningful Engagement Handbook: A guide for understanding, measuring, and increasing lived experience leadership across the spectrum of engagement*, written by Chris Ash and Sophie Otiende for Collective Threads Initiative. You can access the handbook and all accompanying tools at www.collectivethreads.org.

The **Analysis Tools for the Lived Experience Inclusion Ladder Survey** are intended to help you analyse your results on the surveys in this toolbox and develop a plan for next steps. We also have a Google Spreadsheet that can help calculate these more easily for you. These instructions are specific to analysing results from these specific surveys, although some tools may be used or adapted for other purposes.

A Note on Evaluation

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.[1] 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, or an interview guide or checklist) 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"[2] 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 → implementation is often referred to as "continuous quality improvement" or CQI.

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[1] "Continuous quality improvement" means learning what is working and what isn't, making changes to address the issues, implementing the new approach, and then learning what is working and what isn't with the new approach. Then you continue improving the quality based on the evidence collected, implementing, and evaluating again in a cycle.

[2] "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.

Keeping it simple:

In evaluation, an **indicator** is a measurable category that can reveal your strength or weakness in a given area. If you wanted to measure how well you did on planning a dinner with friends, indicators might be things like what percentage of the invitees attended, whether they enjoyed the meal, and whether they had a good time.

For each indicator, you would need a strategy for finding out your score. Some things can be determined without asking. For example, if you wanted to find the percentage of invitees who attended, you could find out by counting how many people attended and how many you invited.

Other things you need to ask. For those things, you would need to determine the right way to ask. For example, if you wanted to find out whether people enjoyed the meal, you could ask them "Did you enjoy the meal?" and have yes and no as answers. You might also create a survey (an **instrument** for gathering information about your indicators) and ask them to rate their enjoyment of the meal on a scale of 1 to 5. If you wanted more specific information, you could list each dish and ask them to rate their enjoyment of each dish on a scale of 1 to 5. If you listed all the dishes, even though there would be multiple items on the survey, they are all helping you determine how you did on *one* indicator: whether or not people enjoyed the meal.

Continuous quality improvement simply means a cycle of improvement based on evidence from your evaluation.

1) Define or improve your strategy and activities.
2) Identify indicators based on your goals.
3) Determine how you will find out how you did on the indicators – your "evaluation plan."
4) Implement your strategy and activities.
5) Measure your indicators using your evaluation plan and identify what needs to change.
   ↳Repeat

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 not nearly as 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 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. However, when done well and thoughtfully, data collection and analysis for CQI can be one of the most valuable and essential processes for the organisation itself. It is important to incorporate evaluation into your budgets, staffing capacity, and timelines when developing funding processes.

Our toolbox includes a series of surveys and analysis tools that 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.

Does evaluation comprise only surveys?

No! While surveys are an important part of evaluation, they are not the only tool – or even the best tool. For some topics, some people find that surveys reduce complex ideas to numbers. Our primary evaluation tools for this toolbox are the Comprehensive, Abbreviated, and Participant Surveys. We chose these tools because they are simpler to administer and analyse in-house than some other forms of evaluation, primarily because they are easily adapted by removing less-relevant questions or integrating into existing surveys, and because they can alternatively be used as a checklist for an organisation to work through. However, throughout the surveys you will notice that we have occasionally listed ideas for alternative ways to gather needed information.

Some of these ideas incorporate "qualitative analysis." Whereas *quantitative* evaluation generates numbers that can be analysed, *qualitative* evaluation generates non-numerical information like images, write-in responses, or transcripts of conversations. Qualitative data on its own can give us ideas. If you want to learn more about how to formally analyse qualitative data, consider taking a course on the basics of evaluation.

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In addition to surveys, common evaluation tools include:

Focus groups
These are a type of qualitative research that brings together a small group of people representing a target audience and, guided by a moderator, will discuss a specific topic, products, services or concepts in a controlled environment.[3] An example of using focus groups with your evaluation might be to use some of the questions from the participant survey to develop a script (the instrument) to use in a focus group of former participants. This can help you better understand the numeric information from the survey.

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[3] See: https://www.qualtrics.com/experience-management/research/focus-groups/.

Semi-structured interviews
Semi-structured interviews are similar to focus groups but with each involving one person as a subject. The facilitator of the interview develops a set of standard questions that will be asked of all interviewees but allows for space to ask additional questions or follow threads as they come up during the interview. Different evaluation tools are often paired to create an overall evaluation strategy. For example, you might survey a large number of people, then conduct semi-structured interviews with a smaller number of people, analyse the responses from the interviews to identify other things you'd like to know, and then invite the people who did the semi-structured interviews back for a focus group to learn more in dialogue.

Photovoice
"Photovoice is a qualitative method that uses participant perspective to capture meaningful insights of their lived experience through photography. Usually, the photographer is guided by some prompting questions from the evaluator, and the images are accompanied by a caption or short narrative from the photographer. Together the photo and the narrative tell a story from the perspective of the participant."[4]
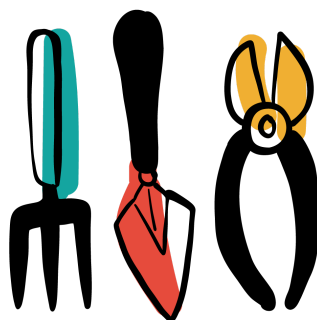
Thematic analysis
Thematic analysis is not its own evaluation method or instrument, but rather is a technique evaluators use to identify trends in qualitative data. You can find several simple tutorials for thematic analysis online. Thematic analysis could also be used if you wanted to add open-ended questions to your meaningful engagement survey, such as "feel free to explain your response here."

If you are interested in using alternative approaches to evaluation, consider reaching out to an evaluator skilled in qualitative and decolonial approaches to evaluation.
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When using surveys, it is important to remember that numbers are more than just numbers – they are a symbolic way to express ideas and personal experiences. The people behind the surveys and the complex experiences they are expressing are what genuinely matter, and survey responses are approximations, at best, of what we are hoping to understand. We analyse responses with that in mind.

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[4] Learn more at https://www.evalacademy.com/articles/a-picture-is-worth-a-thousand-words-photovoice.

Which surveys should we use?

Comprehensive Surveys ● *The Full Comprehensive Lived Experience Inclusion Ladder Survey* ● *The Staff Comprehensive Lived Experience Inclusion Ladder Survey*	The comprehensive surveys are designed for larger, more established organisations or those with greater time and capacity for evaluating meaningful engagement practices.
Abbreviated Surveys ● *The Full Abbreviated Lived Experience Inclusion Ladder Survey* ● *The Staff Abbreviated Lived Experience Inclusion Ladder Survey*	The abbreviated surveys are designed for smaller organisations or those with limited time and capacity for evaluating meaningful engagement practices.
Human Resources and Operations Survey ● *The Human Resources and Operations Lived Experience Inclusion Ladder Survey*	The Human Resource and Operations survey has questions asking for information that (in most organisations) might only be available to human resources, operations, and executive leadership, such as questions about staff demographics or scores that the organisation received on different levels of the engagement spectrum. If used, it should be administered *after* the other surveys, as it draws on findings from the other surveys.
Full Surveys ● *The Full Comprehensive Lived Experience Inclusion Ladder Survey* ● *The Full Abbreviated Lived Experience Inclusion Ladder Survey*	The full surveys for the comprehensive and abbreviated ladders include all questions for general staff as well as for human resources and operations staff. They are ideal if surveying in a small enough organisation that they can be filled out in team meetings through discussion, or if the organisation has collaborative decision-making processes. When administering full surveys to all staff, remind staff that they can select "X" for any items they do not know the answer to.

Staff Surveys ● The Staff Comprehensive Lived Experience Inclusion Ladder Survey ● The Staff Abbreviated Lived Experience Inclusion Ladder Survey	The staff surveys for comprehensive and abbreviated ladders do not include questions that would typically require human resources or operations knowledge. If used, please also use the Human Resources and Operations Survey to ensure all indicators are tracked. Note that we have included questions about organisational policy and equity on staff surveys to ensure that implementation perceptions are tracked, and not just official protocols.
Participant Surveys ● The Participant Lived Experience Inclusion Ladder Survey	The participant survey is the same no matter what other surveys you administer, although it can be adapted to align with your existing participant surveys. This survey provides helpful information that can be compared with staff perceptions to identify gaps in implementation.

These surveys can be used in various combinations to get a broad picture of your organisation's meaningful engagement practices and needs. Possibilities include:

- Staff Comprehensive survey administered anonymously to all staff, Full Abbreviated survey completed in weekly meetings of team leads and supervisors, Human Resources and Operations survey administered via online survey to human resources staff and directors.
- Full Abbreviated survey completed over a series of staff meetings by all staff at a small organisation. Participant survey administered to current and former participants.
- *Inform* and *Ask* levels of Staff Abbreviated Survey administered to all staff. *Inform* and *Ask* levels of the Human Resources and Operations survey administered online to human resources staff and organisational directors. Participant survey administered to a mix of current and former staff. Organisation chooses to work on first two levels in year one.

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 representatives from human resources and executive leadership, as well as programme managers, frontline staff, and contractors, with an emphasis on including those who have disclosed lived experience.

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A few relevant considerations:

If only leadership fills it out, or only your human resources person, 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 multiple staff complete surveys, with participation 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 and **consider, where helpful, linking to the referenced tools, websites, or policies.** If participant/client perceptions and scores differ considerably from your staff's perceptions 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 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

Analysing Survey Results

Broad Analysis

In order to determine your next steps, you will need to first conduct some minimal analysis of your data.

Step One: Average Score Chart

In the surveys, each question can be matched to one of the indicators for measuring meaningful engagement. The Average Score Chart lists all the indicators and by each indicator it lists which questions on each survey assess that indicator. Some indicators have more than one question assessing them, but not all do. Not all indicators have questions on every survey.

Calculating the Average Score for Each Indicator on One Survey

First, calculate your mean score for each indicator on each survey and record it on the Average Score Chart. Each question has a total score of 2. Add up the total of all the scores and divide it by the number of responses you are including. You should have a number between 0 and 2. *Exclude any questions answered with an X, as those represent "unknown" and indicate that the particular person did not have the experience to assess this indicator.*

Examples for the Average Score for Each Indicator on One Survey

Example 1: Questions 2 and 3 on the Full Abbreviated Ladder Survey correspond to indicator two on the Average Score Chart: "Transparency about lived experience feedback." In this example you gave the abbreviated survey to five people, and their scores (on a scale from 0-2) were 0, 1, 1, 2, and 1 for Question 2 and 1, 1, 2, 0, 2 for Question 3.

	0	1	2	X
2. We provide information in an easily understandable way about how any reports, positive feedback, or complaints from people with lived experience are addressed.	(0)	1	2	X
3. We consistently provide overall project updates to subject matter experts.	0	(1)	2	X
2. We provide information in an easily understandable way about how any reports, positive feedback, or complaints from people with lived experience are addressed.	0	(1)	2	X
3. We consistently provide overall project updates to subject matter experts.	0	(1)	2	X
2. We provide information in an easily understandable way about how any reports, positive feedback, or complaints from people with lived experience are addressed.	0	(1)	2	X
3. We consistently provide overall project updates to subject matter experts.	0	1	(2)	X
2. We provide information in an easily understandable way about how any reports, positive feedback, or complaints from people with lived experience are addressed.	0	1	(2)	X
3. We consistently provide overall project updates to subject matter experts.	(0)	1	2	X
2. We provide information in an easily understandable way about how any reports, positive feedback, or complaints from people with lived experience are addressed.	0	(1)	2	X
3. We consistently provide overall project updates to subject matter experts.	0	1	(2)	X

In this case you would:
1) Add 0, 1, 1, 2, 1, 1, 1, 2, 0, and 2 for a total of 11.
2) Divide 11 by the number of numeric responses for questions 2 and 3 on this survey (10 responses).

$$0 + 1 + 1 + 2 + 1 + 1 + 1 + 2 + 0 + 2 = 11$$
$$\cdot \quad \cdot \quad \cdot \quad \cdot \quad \cdot \quad \cdot \quad \cdot \quad \cdot \quad \cdot \quad \cdot = 10 \text{ numbers}$$

$$11 \div 10 = 1.10$$

3) 11 divided by 10 = 1.10. So you would record 1.10 as the average score for indicator 2 in the column for the abbreviated survey on the Average Score Chart.

INFORM: Indicators and questions on each survey that assess the organisation's lived experience engagement at this level.	Average scores from the Comp. Full survey	Average scores from the Comp. All-Staff survey	Average scores from the Abbrev. Full survey	Average Scores from the Abbrev. All-Staff survey
1. Accessible public materials Comprehensive Full - 1, 2, 3 Comprehensive All-Staff - 1, 2, 3 Abbreviated Full - 1 Abbreviated All-Staff - 1 Participant - 1				
2. Transparency about lived experience feedback Comprehensive Full - 6, 7 Comprehensive All-Staff - 6, 7 Abbreviated Full - 2, 3 Abbreviated All-Staff - 2, 3 Participant - 9, 10			1.10	

Example 2: If one of the five people you survey does not work in a role where they know the answer to these questions, they might put an X instead of a number, which indicates that they don't know or it's not applicable. In this case, your responses might be 0, X, 1, 2, and 1 for Question 2, and 1, X, 2, 0, and 2 for Question 3.

	0	1	2	X
2. We provide information in an easily understandable way about how any reports, positive feedback, or complaints from people with lived experience are addressed.	(0)	1	2	X
3. We consistently provide overall project updates to subject matter experts.	0	(1)	2	X

	0	1	2	X
2. We provide information in an easily understandable way about how any reports, positive feedback, or complaints from people with lived experience are addressed.	0	1	2	(X)
3. We consistently provide overall project updates to subject matter experts.	0	1	2	(X)

	0	1	2	X
2. We provide information in an easily understandable way about how any reports, positive feedback, or complaints from people with lived experience are addressed.	0	(1)	2	X
3. We consistently provide overall project updates to subject matter experts.	0	1	(2)	X

	0	1	2	X
2. We provide information in an easily understandable way about how any reports, positive feedback, or complaints from people with lived experience are addressed.	0	1	(2)	X
3. We consistently provide overall project updates to subject matter experts.	(0)	1	2	X

	0	1	2	X
2. We provide information in an easily understandable way about how any reports, positive feedback, or complaints from people with lived experience are addressed.	0	(1)	2	X
3. We consistently provide overall project updates to subject matter experts.	0	1	(2)	X

In this case, you would exclude the X from your math entirely.

1) Add 0, 1, 2, 1, 1, 2, 0, and 2 for a total of 9.
2) Divide 9 by the number of *numeric* responses for questions 2 and 3 on this survey (8 responses, not counting the X's).

$$0 + 1 + 2 + 1 + 1 + 2 + 0 + 2 = 9$$
$$\cdot \quad \cdot \quad \cdot \quad \cdot \quad \cdot \quad \cdot \quad \cdot \quad \cdot = 8 \text{ numbers}$$
$$9 \div 8 = 1.125$$

3) 9 divided by 8 is 1.125. You could round it up to 1.13 and record 1.13 as the average score for indicator two in the column for the abbreviated survey on the Average Score Chart.

INFORM: Indicators and questions on each survey that assess the organisation's lived experience engagement at this level.	Average scores from the Comp. Full survey	Average scores from the Comp. All-Staff survey	Average scores from the Abbrev. Full survey	Average Scores from the Abbrev. All-Staff survey
1. Accessible public materials Comprehensive Full - 1, 2, 3 Comprehensive All-Staff - 1, 2, 3 Abbreviated Full - 1 Abbreviated All-Staff - 1 Participant - 1				
2. Transparency about lived experience feedback Comprehensive Full - 6, 7 Comprehensive All-Staff - 6, 7 Abbreviated Full - 2, 3 Abbreviated All-Staff - 2, 3 Participant - 9, 10			1.13	

Repeat this process for each indicator row for each survey type you administered (or hire an evaluator to do it for you!).

Calculating the Average Scores for Each Indicator Across All Surveys

After recording the average score for each indicator for each survey, you can then calculate your average score for each indicator *across surveys* and record these scores in the "Overall average" column of the Average Scores Chart.

Examples for the Average Scores for Each Indicator Across All Surveys

Example 3: If you administered the Full Comprehensive, Full Abbreviated, and Participant surveys, you should now have a response for each column for indicator two, "Transparency about lived experience feedback."

INFORM: Indicators and questions on each survey that assess the organisation's lived experience engagement at this level.	Average scores from the Comp. Full survey	Average scores from the Comp. All-Staff survey	Average scores from the Abbrev. Full survey	Average Scores from the Abbrev. All-Staff survey	Average scores from the HR/Ops survey	Average scores from the Part. survey	**Overall average** (the total of average scores from each of the surveys to the left divided by the number of types of surveys administered):
1. Accessible public materials Comprehensive Full - 1, 2, 3 Comprehensive All-Staff - 1, 2, 3 Abbreviated Full - 1 Abbreviated All-Staff - 1 Participant - 1	1.1	✕	.8	✕		.5	
2. Transparency about lived experience feedback Comprehensive Full - 6, 7 Comprehensive All-Staff - 6, 7 Abbreviated Full - 2, 3 Abbreviated All-Staff - 2, 3 Participant - 9, 10	1.3	✕	1.1	✕		.8	

If your scores are 1.3, 1.1, and 0.8, you would add those three scores together (3.2) and then you would divide that number by the number of numeric scores (3).

$$1.3 + 1.1 + 1.8 = 3.2$$
$$= 3 \text{ numbers}$$
$$3.2 \div 3 = 1.07$$

3.2 divided by 3 is 1.07. So you would record 1.07 in the column on the right as the overall score for indicator two.

INFORM: Indicators and questions on each survey that assess the organisation's lived experience engagement at this level.	Average scores from the Comp. Full survey	Average scores from the Comp. All-Staff survey	Average scores from the Abbrev. Full survey	Average Scores from the Abbrev. All-Staff survey	Average scores from the HR/Ops survey	Average scores from the Part. survey	**Overall average** (the total of average scores from each of the surveys to the left divided by the number of types of surveys administered):
1. Accessible public materials Comprehensive Full - 1, 2, 3 Comprehensive All-Staff - 1, 2, 3 Abbreviated Full - 1 Abbreviated All-Staff - 1 Participant - 1	1.1	✕	.8	✕		.5	0.8
2. Transparency about lived experience feedback Comprehensive Full - 6, 7 Comprehensive All-Staff - 6, 7 Abbreviated Full - 2, 3 Abbreviated All-Staff - 2, 3 Participant - 9, 10	1.3	✕	1.1	✕		.8	1.07

Example 4: If you only administered the Full Abbreviated and Full Comprehensive surveys, but not the Participant one, you will only have two numbers – 1.3 and 1.1.

INFORM: Indicators and questions on each survey that assess the organisation's lived experience engagement at this level.	Average scores from the Comp. Full survey	Average scores from the Comp. All-Staff survey	Average scores from the Abbrev. Full survey	Average Scores from the Abbrev. All-Staff survey	Average scores from the HR/Ops survey	Average scores from the Part. survey	Overall average (the total of average scores from each of the surveys to the left divided by the number of types of surveys administered):
1. Accessible public materials Comprehensive Full - 1, 2, 3 Comprehensive All-Staff - 1, 2, 3 Abbreviated Full - 1 Abbreviated All-Staff - 1 Participant - 1	1.1		.8				
2. Transparency about lived experience feedback Comprehensive Full - 6, 7 Comprehensive All-Staff - 6, 7 Abbreviated Full - 2, 3 Abbreviated All-Staff - 2, 3 Participant - 9, 10	1.3		1.1				

You would add these together (2.4) and divide that by the number of numeric responses (2).

$$1.3 + 1.1 = 2.4$$
$$\bullet \qquad \bullet \quad = 2 \text{ numbers}$$
$$2.4 \div 2 = 1.2$$

2.4 divided by 2 is 1.2. So you would record 1.2 in the column on the right as the overall score for indicator two.

INFORM: Indicators and questions on each survey that assess the organisation's lived experience engagement at this level.	Average scores from the Comp. Full survey	Average scores from the Comp. All-Staff survey	Average scores from the Abbrev. Full survey	Average Scores from the Abbrev. All-Staff survey	Average scores from the HR/Ops survey	Average scores from the Part. survey	Overall average (the total of average scores from each of the surveys to the left divided by the number of types of surveys administered):
1. Accessible public materials Comprehensive Full - 1, 2, 3 Comprehensive All-Staff - 1, 2, 3 Abbreviated Full - 1 Abbreviated All-Staff - 1 Participant - 1	1.1		.8				.95
2. Transparency about lived experience feedback Comprehensive Full - 6, 7 Comprehensive All-Staff - 6, 7 Abbreviated Full - 2, 3 Abbreviated All-Staff - 2, 3 Participant - 9, 10	1.3		1.1				1.2

You will want to do this for each indicator in every level of the spectrum.

You will use these scores to identify the specific ways you can improve your overall lived experience engagement. Before moving on to step two, use these overall averages to determine your total score for that level of engagement in the bottom right of each section. To do this, you will add up all your overall scores for each indicator in a section and then divide that by the number of indicators with a score. You would then divide that number by the highest possible score to find your percentage. These numbers will be transposed into the Ladder Results table.

Example 5: The *Empower* level of the Average Scores Chart has three indicators, and each should have an overall average score in the column to the right.

Empower: Indicators and questions on each survey that assess the organisation's lived experience engagement at this level.	Average scores from the Comp. Full survey	Average scores from the Comp. All-Staff survey	Average scores from the Abbrev. Full survey	Average Scores from the Abbrev. All-Staff survey	Average scores from the HR/Ops survey	**Overall average** (the total of average scores from each of the surveys to the left divided by the number of types of surveys administered):
28. People with lived experience in decision-making positions Comprehensive Full - 49, 50 Abbreviated Full - 30 HR/Ops - 13, 14	1.2		1.0		1.8	1.33
29. Lived experience-friendly workplaces Comprehensive Full - 51, 52, 53, 54, 55 Comprehensive All-Staff - 38, 39, 40 Abbreviated Full - 31, 32, 33, 34 Abbreviated All-Staff - 21, 22 HR/Ops - 15, 16	.8	1.0	.7	1.2	1.5	1.04
30. Score on Collaborate Comprehensive Full - 48 Abbreviated Full - 29 HR/Ops - 12	.5		1.1		1.6	1.06
Totals						Total Score on *Empower*: ___ / 2 (___%)

If your overall scores listed down that column read 1.33, 1.04, and 1.06, you would add those together (3.43). You would then divide that by the number of indicators listed (3) to find out your total score for this level of the spectrum.

$$1.33 + 1.04 + 1.06 = 3.43$$
$$\bullet \qquad \bullet \qquad \bullet \quad = 3 \text{ numbers}$$

$$3.43 \div 3 = 1.14$$

3.43 divided by 3 is 1.14, so you would record 1.14 in the left blank under total score.

Empower: Indicators and questions on each survey that assess the organisation's lived experience engagement at this level.	Average scores from the Comp. Full survey	Average scores from the Comp. All-Staff survey	Average scores from the Abbrev. Full survey	Average Scores from the Abbrev. All-Staff survey	Average scores from the HR/Ops survey	**Overall average** (the total of average scores from each of the surveys to the left divided by the number of types of surveys administered):
28. People with lived experience in decision-making positions Comprehensive Full - 49, 50 Abbreviated Full - 30 HR/Ops - 13, 14	1.2		1.0		1.8	1.33
29. Lived experience-friendly workplaces Comprehensive Full - 51, 52, 53, 54, 55 Comprehensive All-Staff - 38, 39, 40 Abbreviated Full - 31, 32, 33, 34 Abbreviated All-Staff - 21, 22 HR/Ops - 15, 16	.8	1.0	.7	1.2	1.5	1.04
30. Score on Collaborate Comprehensive Full - 48 Abbreviated Full - 29 HR/Ops - 12	.5		1.1		1.6	1.06
Totals						Total Score on *Empower*: 1.14 / 2 (___%)

Since the highest possible score is 2, you can find out your percentage score by dividing 1.14 by 2, which is .57.

$$1.14 \div 2 = .57$$

So, you scored 57% on the *Inform* level. You would then transpose that score onto the *Inform* level on the Ladder Results table.

Empower: Indicators and questions on each survey that assess the organisation's lived experience engagement at this level.	Average scores from the Comp. Full survey	Average scores from the Comp. All-Staff survey	Average scores from the Abbrev. Full survey	Average Scores from the Abbrev. All-Staff survey	Average scores from the HR/Ops survey	**Overall average** (the total of average scores from each of the surveys to the left divided by the number of types of surveys administered):
28. People with lived experience in decision-making positions Comprehensive Full - 49, 50 Abbreviated Full - 30 HR/Ops - 13, 14	1.2		1.0		1.8	1.33
29. Lived experience-friendly workplaces Comprehensive Full - 51, 52, 53, 54, 55 Comprehensive All-Staff - 38, 39, 40 Abbreviated Full - 31, 32, 33, 34 Abbreviated All-Staff - 21, 22 HR/Ops - 15, 16	.8	1.0	.7	1.2	1.5	1.04
30. Score on Collaborate Comprehensive Full - 48 Abbreviated Full - 29 HR/Ops - 12	.5		1.1		1.6	1.06
Totals						Total Score on *Empower*: 1.14 / 2 (57 %)

You will want to calculate your percentage for every level of the spectrum.

Step Two: Ladder Results

Next, record your total scores from each section of the Average Scores Chart in the Ladder Results table.

Initial analysis
- Start your analysis with the Ladder Results table.
- Do you have 75% on *Inform*? If so, look at your score for *Ask* – do you have 75%? If so, continue through the sections' scores until you identify the first level at which you fail to score 75%. *This is your target level for your first actions.*
- Now, look at your target level's results in the Average Scores Chart.
- Are there any of these indicators that could be brought to a score of 2 with little or no funding in less than a month? These are your "low-hanging fruit." You can knock them off the list and improve them easily. Give yourself up to one month to address any low-hanging fruit.
- Are you at 75% now? If so, you can move on to the next level that has a score of lower than 75%. Remember, you can continue to work on any remaining indicators even in levels that you "passed" as ongoing projects.
- If resolving your low-hanging fruit does not get you to 75%, you will need to do a mid-level analysis for that level to determine the next steps.

Example 6: After calculating your average score for each level and the accompanying percentage, you facilitate a discussion with staff to identify strengths and weaknesses. You record all of this in the Ladder Results Table.

Section	Score	%	Strengths	Weaknesses
Inform	.6 out of 2	30%	Website imagery is good	Need to work on transparency and accessibility
Ask	1.2 out of 2	60%	Advisory board is engaged	Do not survey current participants
Involve	1.7 out of 2	85%	Strong consultant network	Consultant pay needs to increase
Collaborate	1.4 out of 2	70%	Staff pay equity audit	Need to incorporate more opportunities for job mobility
Empower	1.14 out of 2	57%	percentage of staff from impacted communities	Board needs education around values in practice
Structures	.7 out of 2	35%	PTO	Need to budget for wellbeing in every grant

Step one: Do you have 75% on Inform? No. You do not. Therefore Inform is your current target level for work.

That said, great job on scoring over 75% on Involve. That is not easy, and your organisation has done well! The scores on Ask, Collaborate, and Empower are also pretty good. However, even though you have 85% on a higher level, the first level at which you score less than 75% is your first target level.

Why? Because sometimes organisations may employ, consult with, be advised by, or even have been founded or be led by someone with lived experience, but not be able to reach the intended communities or may not be accessible to the people who most need the organisation's support or services.

Examples of this may include:
- *An organisation with a lived experience advisory council that says it serves all survivors of the issue in a geographical region, who cannot reach the 48% of the population that speaks Spanish because only the intake forms have been translated (but not the website, social media, or outreach materials).*
- *A research initiative led by an academic who also has lived experience whose only outputs are for academic audiences, even though their learnings would be useful to community organisers.*
- *An organisation that regularly has consultants from impacted communities review protocols but does not ensure that participants are regularly reminded of and offered access to the grievance and safeguarding protocols outside of the initial intake appointment.*

Note: While working through the formal process with the Inform level, relevant staff can still look at the average scores for indicators in the levels that your organisation is close to 75%, such as Ask and Collaborate. Since many of the issues in the Inform work plan will be assigned to communications and case management staff, service managers could work on developing a survey procedure for current participants as well as establishing a feedback drop box for anonymous feedback (Ask). Human resources staff could develop a standard of practice to include questions in annual reviews to identify the kinds of work staff might be interested in moving into so that appropriate professional development opportunities can be planned (Collaborate). This would mean that once the Inform level work plan is completed, the organisation is better prepared to meet or work on the next levels' needs.

The results from this example would indicate a need to work on the Inform level in the Priority Score Worksheet and Priority Matrix, and to develop a work plan before diving into work on the next level.

Priority analysis

- Start your analysis with your Average Scores Chart. Look at the indicators for your target level. For the indicators that have an average score of 1.5 or less, record these indicators in the Priority Score Worksheet.

Example 7: If this is your organisation's average scores for the Inform level, you are below 1.5 on all indicators except for indicator 3, Accessible, clear safeguarding and grievance policies.

INFORM: Indicators and questions on each survey that assess the organisation's lived experience engagement at this level.	Average scores from the Comp. Full survey	Average scores from the Comp. All-Staff survey	Average scores from the Abbrev. Full survey	Average Scores from the Abbrev. All-Staff survey	Average scores from the HR/Ops survey	Average scores from the Part. survey	Overall average (the total of average scores from each of the surveys to the left divided by the number of types of surveys administered):
1. Accessible public materials Comprehensive Full - 1, 2, 3 Comprehensive All-Staff - 1, 2, 3 Abbreviated Full - 1 Abbreviated All-Staff - 1 Participant - 1	1.7					.9	1.3
2. Transparency about lived experience feedback Comprehensive Full - 6, 7 Comprehensive All-Staff - 6, 7 Abbreviated Full - 2, 3 Abbreviated All-Staff - 2, 3 Participant - 9, 10	0					0	0
3. Accessible, clear safeguarding and grievance policies Comprehensive Full - 4, 5 Comprehensive All-Staff - 4, 5 Abbreviated Full - 4 Abbreviated All-Staff - 4 HR/Ops - 1 Participant - 2	1.6			2	1.3		1.6
4. Bias and sensationalism Comprehensive Full - 8 Comprehensive All-Staff - 8 Abbreviated Full - 5 Abbreviated All-Staff - 5 Participant - 3, 4	.4					0	.2
5. Ethical use of personal stories Comprehensive Full - 9, 10, 11 Comprehensive All-Staff - 9, 10, 11 Abbreviated Full - 6, 7, 8 Abbreviated All-Staff - 6, 7, 8 Participant - 5	1					.2	.6
6. Lived experience representation Participant - 6, 7						.5	.5
7. Supporting meaningful engagement among partners Comprehensive Full - 12 Comprehensive All-Staff - 12	0						0
Totals							Total Score on *Inform*: .6 / 2 (30 %)

Therefore, you would fill in the Priority Score Worksheet like this:

Priority Score Worksheet

Current target level? _Inform_

1. List all indicators on which you scored less than 1.5 in the table below.
2. Assess the potential impact and potential resources required.
3. This activity is best completed in a facilitated team discussion and may require multiple sessions, with the investigation of data and resources in between, [t]
   complete accurately and effectively.

Indicator:	Assessment of potential impact on a scale of 1-5	Assessment of funds or staffing resources required on a scale of 1-5	Is there (or will there be) a plan for ensuring this work is sustainable beyond our assessment period?	Notes
People with lived experience engaged at key stages of work.	*4*	*3*	*Yes, we just need to institutionalise the practice.*	*We have not engaged for planning as well as we could. Need to budget for focus groups prior to grant applications.*
Accessible Public materials				
Transparency about LE feedback				
Bias and sensationalism				
Ethical use of personal stories				
Lived Experience Representation				
Supporting ME among partners				

Notice that we have skipped adding Indicator 3, since its score is higher than 1.5

● Indicate a score for each "Priority" criteria: Impact, [Resources](#) (time/money) needed. This may be completed by an external evaluator or in group meetings and discussions with key team members responsible for your meaningful lived experience engagement processes (to include individuals with lived experience of trafficking). Discussing and assigning scores in a collaborative process may facilitate new findings and ideas. Remember the importance of sustainability of processes and programmes you implement as you consider both impact (long-term) and resources (to include partnerships).

Example 8: Using the Priority Score Worksheet you filled in with indicators in the previous example, you may choose to facilitate a discussion between key staff members.

Note: It is common for everyone to want to score every indicator as high importance or impact, because engagement of impacted communities is incredibly important and says so much about an organisation. Remind participants in this process that our goal is to prioritise where to start and how to approach the issue, and to assign scores for importance or impact that help rank needs in a manageable way. As the group talks about why they assign the score they do, have someone take notes in the notes section, which will help when it is time to prepare a work plan. When there are disagreements between individuals about a score, allow time for discussion and then see if a compromise can be reached. Two people strongly feel it is a 4 and another feels strongly that it is a 3? Ask if a 3.6 works for everyone.

When you finish, you may end up with a Priority Score Worksheet that looks something like this:

Priority Score Worksheet

Current target level? __Inform__

1. List all indicators on which you scored less than 1.5 in the table below.
2. Assess the potential impact and potential resources required.
3. This activity is best completed in a facilitated team discussion and may require multiple sessions, with the investigation of data and resources in between, to complete accurately and effectively.

Indicator:	Assessment of potential impact on a scale of 1-5	Assessment of funds or staffing resources required on a scale of 1-5	Is there (or will there be) a plan for ensuring this work is sustainable beyond our assessment period?	Notes
People with lived experience engaged at key stages of work.	*4*	*3*	*Yes, we just need to institutionalise the practice.*	*We have not engaged for planning as well as we could. Need to budget for focus groups prior to grant applications.*
Accessible Public materials	4	4	write accessibility into every grant budget	This feels important but only AFTER we have less sensational comms that use ethical narrative
Transparency about LE feedback	3	1	institutionalize sending out follow up after every input opp.	This feels important but again will be less impactful until we address narrative + accessibility
Bias and sensationalism	5	3	yes with planned review of all new comms	This is our biggest barrier to diverse LE engagement. Essential to have a diverse impacted team review
Ethical use of personal stories	5	2	institutionalize new practices	Revise all consent forms to describe uses, sunset dates, + protocol for withdrawing consent.
Lived Experience Representation	3	4	→	This is essential, but unlikely to be sustainable without first addressing narrative bias, etc.
Supporting ME among partners	2	4	→	This feels hypocritical without first strengthening our practices on all levels of the spectrum.

- Place your indicators into the Priority Matrix based on your scores on the Priority Score Worksheet.
  - High Impact, Low Resource: Prioritise for implementation, if you can develop a reasonably secure sustainability plan with your local partners.
  - High Impact, High Resource: Investigate options, potential sustainable funding streams, and potential contracts.
  - Low Impact, Low Resource: Consider as a future project based on capacity.
  - Low Impact, High Resource (or any projects that are not sustainable beyond the initial grant period): Deprioritise.

Example 9: Using the information from the above example, you might have a Priority Matrix that looks like this:

	Low Resource	High Resource
	Prioritise	**Investigate**
High Impact	Ethical use of stories Bias and sensationalism Feedback Transparency *Prioritise for implementation if you can develop a reasonably secure sustainability plan with your local partners.*	Accessible Resources LE Representation *Investigate options, potential sustainable funding streams, and potential contracts.*
	Consider	**Deprioritise**
Low Impact	 *Consider as a future project based on capacity.*	Supporting ME among partners *Also, deprioritise any projects that are not sustainable beyond the initial grant period.*

● Work with project managers, programme managers, or technical assistance providers to develop an organisational action plan for implementation of action items based upon your assessment in the Priority Matrix.

Example 10: Using the information from examples 8 and 9, the first two items on your work plan might look like the following:

Task	Steps	Responsible Person	Teams/Collaborators	Timeline
Improve website accessibility	*1) Create alt text for all images in media library.* *2) Have consultant review content for readability.* *3) Check all colours against online colour contrast checker.* *4) Assess all pdfs for screen reader compatibility and make list of those that need revision.* *5) Explore grant options for broader website overhaul.*	*1) Comms specialist* *2) Comms coordinator* *3) Comms specialist* *4) Comms specialist* *5) Development assistant*	*Rest of comms team can tap in to review as requested.* *Partnerships Coordinator will share listing to identify consultant.*	*1) Complete by 3 Aug 2025.* *2) Contracted by 1 Oct, new content finalised by 30 Nov 2025.* *3) Complete by 30 Sept 2025.* *4) Complete by 30 Nov 2025.* *5) List ready for director review by 15 Sept.*
Ethical Stories: Consent Forms	1) Have 4-6 reviewers with lived exp. review existing consent forms - both feedback and alternatives 2) Train all staff on revised consent form 3) 6 month follow up for any additional adjustments and alignment to care model	1 through 3: Director of Services	1) Advisory Council 2) Operations Director 3) Team Leads	1) months 1-3 2) months 3-5 3) month 6
Ethical Stories: Model of Care	1) Develop ethical protocols around how speaking engagements are offered and who delivers the invite 2) Develop care/support options avail. to all storytellers before, during, and after engagements 3) train all relevant staff on new protocol 4) Refresher training annually	1) Directors: Services and Operations 2) Directors: Services and Communications 3 and 4) Director of Services	1 & 2) Advisory council, therapeutic staff 3 & 4) Advisory council	1) months 1-2 2) months 3-4 3) month 7 4) annually

- As you address issues in your average scores chart, periodically check how new changes would shift your percentages in each level of the Ladder Results table. Once you are confident you would reach 75% on each successive level, you may move on to targeted results at the next level, while maintaining a commitment to continuous improvement on remaining items in lower levels.

Once you get to 75%, take note of any indicators that would still be at 1 or below. Consider engaging in the following values-clarification process with your team. What value does this indicator represent to your team? Is there a population this value leaves behind? For example, if materials are not accessible for blind and deaf or hard-of-hearing people with lived experience, this represents a choice to not make those people a priority. If the people with lived experience that your organisation involves (advisory boards, periodic review teams) are not offered opportunities to learn skills to participate more meaningfully, this represents a belief that people with lived experience do not deserve or are not capable of learning and upward mobility. Have the hard conversations about these and consider developing a plan to address those indicators that are essential to aligning your organisation's practices with its values even if you are able to begin work on the next level of engagement.

Optional: Advanced Analysis

Consider "disaggregating" results to see if you notice trends. For example, if your middle or upper management thinks your score is higher than your frontline staff does, it could be related to a number of factors. Perhaps there are assumptions that things are happening that aren't, or that frontline staff may be aware of challenges that aren't being funnelled "upward" or addressed by leadership. If your frontline staff think your score is higher than leadership does, perhaps your frontline staff go above and beyond what is procedurally required, which can be recognised or institutionalised.

If people with lived experience think your score is lower than those who do not have lived experience of trafficking, there might be a discrepancy between intent and impact. It might also be a case where tokenisation is happening that people with lived experience are more attuned to than other staff, or that these staff are being asked to do additional emotional labour *in lieu of* education that could be provided in other ways.

Developing a Plan

Once you have completed the Priority Score Worksheet, you are ready to develop a workplan to implement the prioritised changes. If your organisation already has a template for a workplan or agency-wide project management protocols or software, you will want to use that. If not, you may want to use our sample Workplan template. Remember: What you create does not need to be complicated. All a workplan documents is: 1) What you want to do, 2) What steps it will involve, 2) Who is taking charge of overseeing it, and 4) The timeline you are planning for. Then discuss how you will handle accountability – *So, at what point will we check back in to see where we are on our goals?*

Want more detail in your workplan?
Consider using multiple "layers" of workplans. For example, using the prefilled sample task in our workplan document, some of the "steps" might themselves have multiple steps. Rather than putting all the sub-steps in one document, you could create a separate workplan for each high-level step to help its responsible party delegate and track the sub-steps for smoother implementation.

Also consider learning about The Management Center's MOCHA framework to better identify the roles and responsibilities of each collaborator.[5]

Setting realistic goals and timelines
Be honest and realistic about what you can do and when. It can be tempting to want to change everything all at once and very quickly, especially when the pressure to do meaningful

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[5] https://www.managementcenter.org/resources/assigning-responsibilities/

engagement "right" may feel intense. Remind yourself: There is no one "right" – only what is right for your organisation and the people it works with – and that nobody gets it "right" all the time. Perfection is the enemy of genuine care and transformation.

Sample timelines:

- **A well-resourced, larger organisation** may discover through the survey that it is doing well on *Ask* and *Consult* but needs work on *Collaborate* and scored very low on *Inform*. It might complete a priority matrix for *Ask* and a separate priority matrix for *Collaborate*. Its comms team could implement a workplan to address the *Inform* level, with other programmes supporting the revision of the *Ask* level materials their programme uses and **complete the work on *Ask* over the course of a 12-month period.** The organisation might choose the **top two prioritised indicators on the *Collaborate* level to complete in year one** and address the **next three prioritised indicators on the *Collaborate* level in year two**. The organisation would then complete an abbreviated survey evaluation and analysis over the first half of year three and, if the improvements are reflected in the outcomes, they would **move forward with the remaining prioritised indicators at the *Collaborate* level in year four**. Throughout this process, directors and programme managers could have access to survey findings related to their programmes for consideration as they are developing new initiatives, knowing that it is easier to write in meaningful engagement from the beginning rather than try to add it in later.
- **A mid-sized organisation** may identify a few odd gaps at the *Inform* level as well as a general focus on the *Ask* level. They may have a communications intern join the team for a school year and **assign as much work on the *Inform* indicators as aligns with the intern's scope and workplan** to see what improvements can be made. They may develop a workplan to **address the three highest prioritised *Ask* indicators over a 12-month period** and assign the other indicators to their development consultant so they can be on the lookout for potential funding opportunities. **In year two, they might develop a workplan for the highest prioritised indicators at the *Collaborate* level** if funding has not yet been received to address the additional *Ask* indicators.
- **A small, [grassroots](#) organisation** may discover that they're doing well at the *Inform, Collaborate*, and *Empower* level due to their deep connection to [impacted communities](#), but that they have not been as engaged in formal evaluation at the *Ask* level or engaged advisory perspectives outside of those of the impacted people they employ. They might spend **year one developing and administering an initial implementation of a new, simple evaluation strategy** to improve engagement at the *Ask* level. They could also have regular meetings (internally and with community partners) to develop a plan for a **community advisory board that could launch in year two** to strengthen their engagement at the *Ask* level.

Remember: Meaningful engagement is not linear, nor is progress towards it. Improving your organisation's meaningful engagement of impacted people is much like improving your

parenting, your relationships, or your health – it's a lifelong journey of learning and unlearning, and of continually checking your actions against your ideal.

Average Score Chart

- *For average scores, use the "mean" method of calculating the average. Responses can be rounded to one decimal place. For example, your average might be 1.6 or 0.8.*
- *Disregard columns for any surveys you did not administer, and do not include any responses marked with an X in the calculation of your averages.*
- *For each item here, the question numbers addressing this issue from the surveys are listed. For example, for item 1 (Accessible public materials), the abbreviated survey asks this on question one, the participant survey asks this on question one, and the comprehensive survey asks about this on questions one, two, and three.*

INFORM: Indicators and questions on each survey that assess the organisation's lived experience engagement at this level.	Average scores from the Comp. Full survey	Average scores from the Comp. All-Staff survey	Average scores from the Abbrev. Full survey	Average Scores from the Abbrev. All-Staff survey	Average scores from the HR/Ops survey	Average scores from the Part. survey	Overall average (the total of average scores from each of the surveys to the left divided by the number of types of surveys administered):
1. Accessible public materials Comprehensive Full - 1, 2, 3 Comprehensive All-Staff - 1, 2, 3 Abbreviated Full - 1 Abbreviated All-Staff - 1 Participant - 1							
2. Transparency about lived experience feedback Comprehensive Full - 6, 7 Comprehensive All-Staff - 6, 7 Abbreviated Full - 2, 3 Abbreviated All-Staff - 2, 3 Participant - 9, 10							

3. Accessible, clear safeguarding and grievance policies Comprehensive Full - 4, 5 Comprehensive All-Staff - 4, 5 Abbreviated Full - 4 Abbreviated All-Staff - 4 HR/Ops - 1 Participant - 2							
4. Bias and sensationalism Comprehensive Full - 8 Comprehensive All-Staff - 8 Abbreviated Full - 5 Abbreviated All-Staff - 5 Participant - 3, 4							
5. Ethical use of personal stories Comprehensive Full - 9, 10, 11 Comprehensive All-Staff - 9, 10, 11 Abbreviated Full - 6, 7, 8 Abbreviated All-Staff - 6, 7, 8 Participant - 5							
6. Lived experience representation Participant - 6, 7							
7. Supporting meaningful engagement among partners Comprehensive Full - 12 Comprehensive All-Staff - 12							
Totals							Total Score on *Inform*: ____/ 2 (___%)

Ask: Indicators and questions on each survey that assess the organisation's lived experience engagement at this level.	Average scores from the Comp. Full survey	Average scores from the Comp. All-Staff survey	Average scores from the Abbrev. Full survey	Average Scores from the Abbrev. All-Staff survey	Average scores from the HR/Ops survey	Average scores from the Part. survey	Overall average (the total of average scores from each of the surveys to the left divided by the number of types of surveys administered):
8. Feedback sought from current clients Comprehensive Full - 14, 15 Comprehensive All-Staff - 13,14 Abbreviated Full - 10 Abbreviated All-Staff - 9 Participant - 8					▓		
9. Grievance, protocols, surveys, and CQI Comprehensive Full - 16, 17 Comprehensive All-Staff - 15 Abbreviated Full - 11 Abbreviated All-Staff - 10 HR/Ops - 3 Participant - 11							
10. Prior programmes and documents review Comprehensive Full - 18, 19, 20, 21 Comprehensive All-Staff - 16, 17, 18, 19 Abbreviated Full - 12 Abbreviated All-Staff - 11					▓	▓	
11. Lived experience input into funding decisions Comprehensive Full - 22 Abbreviated Full - 13 HR/Ops - 4		▓		▓		▓	

12. Score on Inform							
Comprehensive Full - 13 Abbreviated Full - 9 HR/Ops - 2							
Totals							Total Score on *Ask*: ____/ 2 (___%)

Involve: Indicators and questions on each survey that assess the organisation's lived experience engagement at this level.	Average scores from the Comp. Full survey	Average scores from the Comp. All-Staff survey	Average scores from the Abbrev. Full survey	Average Scores from the Abbrev. All-Staff survey	Average scores from the HR/Ops survey	Average scores from the Part. survey	**Overall average** (the total of average scores from each of the surveys to the left divided by the number of types of surveys administered):
13. People with lived experience engaged at key stages of work Comprehensive Full - 24, 25 Comprehensive All-Staff - 20, 21 Abbreviated Full - 15 Abbreviated All-Staff - 12							
14. Participants with lived experience developed towards greater engagement Comprehensive Full - 26, 29 Comprehensive All-Staff - 22, 25 Abbreviated Full - 16 Abbreviated All-Staff - 13 Participant - 12, 13							
15. Non-tokenising selection Comprehensive Full - 27, 28 Comprehensive All-Staff - 23, 24 Abbreviated Full - 17 Abbreviated All-Staff - 14							

16. Safeguarding, belonging, and trauma-informed engagement Comprehensive Full - 30 Comprehensive All-Staff - 26 Abbreviated Full - 18 Abbreviated All-Staff - 15 Participant - 14, 15, 16				▨			
17. CQI for involvement processes Comprehensive Full - 31, 32 Abbreviated Full - 19, 20 HR/Ops - 6, 7		▨		▨		▨	
18. Score on Ask Comprehensive Full - 23 Abbreviated Full - 14 HR/Ops - 5		▨		▨		▨	
Totals							Total Score on *Involve*: ____/ 2 (___%)

Collaborate: Indicators and questions on each survey that assess the organisation's lived experience engagement at this level.	Average scores from the Comp. Full survey	Average scores from the Comp. All-Staff survey	Average scores from the Abbrev. Full survey	Average Scores from the Abbrev. All-Staff survey	Average scores from the HR/Ops survey	**Overall average** (the total of average scores from each of the surveys to the left divided by the number of types of surveys administered):
19. Collaborators with lived experience across departments Comprehensive Full - 34, 36 Abbreviated Full - 22 HR/Ops - 9, 11						
20. People with lived experience in leadership across departments Comprehensive Full - 35 Abbreviated Full - 23 HR/Ops - 10						
21. No mandate for trauma or personal storytelling Comprehensive Full - 37 Comprehensive All-Staff - 27 Abbreviated Full - 24 Abbreviated All-Staff - 16						
22. Lived experience-friendly hiring practices Comprehensive Full - 38, 39, 40 Comprehensive All-Staff - 28, 29, 30						
23. Lived experience-friendly workplace practices Comprehensive Full - 43, 47 Comprehensive All-Staff - 33, 37						

24. Diversity of collaborators with lived experience and equity in the workplace Comprehensive Full - 41, 42 Comprehensive All-Staff - 31, 32 Abbreviated Full - 25, 26 Abbreviated All-Staff - 17, 18					▓▓▓	
25. Adequate onboarding, professional development, and mentoring Comprehensive Full - 44, 45 Comprehensive All-Staff - 34, 35 Abbreviated Full - 27 Abbreviated All-Staff - 19					▓▓▓	
26. Power-sharing with collaborators and stakeholders Comprehensive Full - 46 Comprehensive All-Staff - 36 Abbreviated Full - 28 Abbreviated All-Staff - 20					▓▓▓	
27. Score on Involve Comprehensive Full - 33 Abbreviated Full - 21 HR/Ops – 8		▓▓▓		▓▓▓		
Totals						Total Score on *Collaborate*: ____/ 2 (___%)

Empower: Indicators and questions on each survey that assess the organisation's lived experience engagement at this level.	Average scores from the Comp. Full survey	Average scores from the Comp. All-Staff survey	Average scores from the Abbrev. Full survey	Average Scores from the Abbrev. All-Staff survey	Average scores from the HR/Ops survey	**Overall average** (the total of average scores from each of the surveys to the left divided by the number of types of surveys administered):
28. People with lived experience in decision-making positions Comprehensive Full - 49, 50 Abbreviated Full - 30 HR/Ops - 13, 14						
29. Lived experience-friendly workplaces Comprehensive Full - 51, 52, 53, 54, 55 Comprehensive All-Staff - 38, 39, 40 Abbreviated Full - 31, 32, 33, 34 Abbreviated All-Staff - 21, 22 HR/Ops - 15, 16						
30. Score on Collaborate Comprehensive Full - 48 Abbreviated Full - 29 HR/Ops - 12						
Totals						Total Score on *Empower*: ____/ 2 (___%)

Structures: Indicators and questions on each survey that assess the organisation's lived experience engagement at this level.	Average scores from the Comp. Full survey	Average scores from the Comp. All-Staff survey	Average scores from the Abbrev. Full survey	Average Scores from the Abbrev. All-Staff survey	Average scores from the HR/Ops survey	**Overall average** (the total of average scores from each of the surveys to the left divided by the number of types of surveys administered):
31. Funding Comprehensive Full - 56 Comprehensive All-Staff - 41						
32. Highest level of engagement used Comprehensive Full - 57 Comprehensive All-Staff - 42 Abbreviated Full - 35 Abbreviated All-Staff - 23						
33. Gaps in internal lived experience expertise addressed Comprehensive Full - 58, 59 Comprehensive All-Staff - 43, 44 Abbreviated Full - 36, 37 Abbreviated All-Staff - 24, 25						
34. Conflicts between people with lived experience addressed equitably and transparently Comprehensive Full - 60 Comprehensive All-Staff - 45						

35. Lived experience expertise accessed across all stages of work Comprehensive Full - 61, 62, 63 Comprehensive All-Staff - 46, 47, 48 Abbreviated Full - 38 Abbreviated All-Staff - 26						
36. Staff or contractors with lived experience have equitable workplace experiences Comprehensive Full - 64 Comprehensive All-Staff - 49 Abbreviated Full - 39 Abbreviated All-Staff - 27 HR/Ops - 15,16 (Repeat for this indicator)						
37. Staff educated on labour rights Comprehensive Full - 65 Comprehensive All-Staff - 50 Abbreviated Full - 40 Abbreviated All-Staff - 28						
38. Plan to continue tracking and re-evaluate Comprehensive Full - 66 Abbreviated Full - 41 HR/Ops - 17						
Totals						Total Score on Structures: _____/ 2 (____%)

Ladder Results Table

Record your scores and percentages from each section above into the tally below. Discuss with your team to identify key strengths and opportunities at each level and record them in this worksheet. **What is the lowest section that you are scoring below 75%?** *This is your current level on the Lived Experience Inclusion Ladder. For example, if your scores were 76% on Inform, 36% on Ask, 48% on Involve, 82% on Collaborate, 46% on Empower, and 72% on Structures, your target level would be Ask, since it is the first or lowest level at which you did not reach 75%.*

Section	Score	%	Strengths	Weaknesses
Inform	_____ out of 2			
Ask	_____ out of 2			
Involve	_____ out of 2			
Collaborate	_____ out of 2			
Empower	_____ out of 2			
Structures	_____ out of 2			

Priority Score Worksheet

Current target level? _____

1. List all indicators on which you scored less than 1.5 in the table below.
2. Assess the potential impact and potential resources required.
3. This activity is best completed in a facilitated team discussion and may require multiple sessions, with the investigation of data and resources in between, to complete accurately and effectively.

Indicator:	Assessment of potential impact on a scale of 1-5	Assessment of funds or staffing resources required on a scale of 1-5	Is there (or will there be) a plan for ensuring this work is sustainable beyond our assessment period?	Notes
People with lived experience engaged at key stages of work.	*4*	*3*	*Yes, we just need to institutionalise the practice.*	*We have not engaged for planning as well as we could. Need to budget for focus groups prior to grant applications.*

Priority Matrix

Assess your priority items for potential impact and the amount of resources from the Average Score Chart and identify which indicators could come first.

	Low Resource	High Resource
High Impact	**Prioritise** *Prioritise for implementation if you can develop a reasonably secure sustainability plan with your local partners.*	**Investigate** *Investigate options, potential sustainable funding streams, and potential contracts.*
Low Impact	**Consider** *Consider as a future project based on capacity.*	**Deprioritise** *Also, deprioritise any projects that are not sustainable beyond the initial grant period.*

_____

Basic Workplan

Some organisations may already have workplan templates or project management software that they use. For those who do not, this simple template can be used or adapted to turn the priority matrix into a workplan. Indicators from the Priority Matrix go into the "Task" column.

Task	Steps	Responsible Person	Teams/Collaborators	Timeline
Improve website accessibility	*1) Create alt text for all images in media library.* *2) Have consultant review content for readability.* *3) Check all colours against online colour contrast checker.* *4) Assess all pdfs for screen reader compatibility and make list of those that need revision.* *5) Explore grant options for broader website overhaul.*	*1) Comms specialist* *2) Comms coordinator* *3) Comms specialist* *4) Comms specialist* *5) Development assistant*	*Rest of comms team can tap in to review as requested.* *Partnerships Coordinator will share listing to identify consultant.*	*1) Complete by 3 Aug 2025.* *2) Contracted by 1 Oct, new content finalised by 30 Nov 2025.* *3) Complete by 30 Sept 2025.* *4) Complete by 30 Nov 2025.* *5) List ready for director review by 15 Sept.*

Notes on follow-through and accountability: