

CESBC 2018 Conference Summary Handout

Participatory Approach to Evaluation: Democratizing Evaluation and Embodying Social Inclusion



Participatory Evaluation

“Participatory evaluation ... isn't simply a matter of asking stakeholders to take part. Involving everyone affected changes the whole nature of a project from something done for a group of people or a community to a partnership between the beneficiaries and the project implementers. Rather than powerless people who are acted on, beneficiaries become the copilots of a project, making sure that their real needs and those of the community are recognized and addressed. Professional evaluators, project staff, project beneficiaries or participants, and other community members all become colleagues in an effort to improve the community's quality of life.” (*Community Toolbox: Participatory Evaluation*)

Building on principles that informs work in our sectors¹ – health and social services for people living with HIV/AIDS or hepatitis C and people who use drugs -- which advocate for engagement of people with lived experience or peers at all levels of a program or project we have developed the following definition. Participatory evaluation:

- Is collaborative, change-oriented and inclusive;
- Has built-in supports to ensure participation of people with lived experience or peers (i.e. fair compensation and acknowledgement of work and access to supportive resources including content experts);
- Supports [capacity bridging](#)² – importance of reciprocity of knowledge, skills and capacity amongst all involved stakeholders. Each person has knowledge to contribute and has room to learn; under this value, power hierarchy is minimized and equitable participation is maximized.
- Is built on mutual respect and trust;
- Is committed to long-term, sustainable relationships;
- Is flexible;
- Builds on existing community strengths; and
- Ensures methodological rigor and sound ethical practices.

We have found outcomes to using this approach to evaluation include: community- and team-building; shared ownership of process and results; and enhanced utilization of evaluation findings. Ultimately we feel that this approach can help to democratize evaluation and support social inclusion of people not normally engaged in evaluation.

PAN's Story: Positive Leadership Development Institute (PLDI) Participatory Impact Evaluation

The Pacific AIDS Network (PAN) actively used this approach when evaluating the [Positive Leadership Development Institute \(PLDI\)](#) in BC. PAN learned a lot from its first foray into this highlight participatory methodology.

The PLDI in BC is a leadership training program for people living with HIV and flagship program of the Pacific AIDS Network (PAN). After completing 20 trainings since its launch in 2009, PAN decided it was time to explore the impacts of PLDI in BC. The purpose of evaluating the PLDI program was to determine whether it is meeting the short, intermediate, and long-term objectives of the program and to determine what could be done to improve and grow the program. A team of four Peer Evaluators were hired, trained, and supported to conduct the evaluation. To find resources and summary sheets about both the evaluation findings and also the participatory evaluation process please visit PAN's [PLDI Impact Evaluation Web Page](https://pacificaidnetwork.org/research-and-evaluation/evaluation-pan/positive-leadership-development-institute-impact-evaluation/) (<https://pacificaidnetwork.org/research-and-evaluation/evaluation-pan/positive-leadership-development-institute-impact-evaluation/>).

¹ [Greater Involvement/Meaningful Engagement of People Living with HIV \(GIPA/MEPA\)](#) and [Nothing About Us, Without Us](#) principles

² A term proposed by [AHA Centre](#) (an Indigenous HIV Community-Based Research Centre)

Resources:

Participatory Evaluation & Peer Worker Training, Support and Compensation

Participatory Approach to Evaluation

1. [Participatory Evaluation](https://ctb.ku.edu/en/table-of-contents/evaluate/evaluation/participatory-evaluation/main) by Community Tool Box
(<https://ctb.ku.edu/en/table-of-contents/evaluate/evaluation/participatory-evaluation/main>)
 - Chapter 36, Section 6: This is an awesome tool that provides contents on participatory evaluation (outlines what is participatory evaluation, who would use this approach, when to use it, who should be involved, and how to conduct one); checklist; useful tools and a summary PowerPoint presentation.
2. [Participatory Evaluation](https://www.betterevaluation.org/en/plan/approach/participatory_evaluation) by Better Evaluation
(https://www.betterevaluation.org/en/plan/approach/participatory_evaluation)
 - A great summary of participatory evaluation with links to other tools and resources.
3. [Participatory Evaluation Primer](https://pacificaidnetwork.org/files/2016/03/Participatory-Evaluation-Primer-FINAL.pdf) by PAN
(<https://pacificaidnetwork.org/files/2016/03/Participatory-Evaluation-Primer-FINAL.pdf>)
 - A primer built by PAN to introduce participatory approach to the evaluation team working on PLDI Impact Evaluation. This may be a useful introductory tool for other teams.

Training Peer Evaluators

4. [Peer Evaluator Training Manual](https://pacificaidnetwork.org/files/2017/04/PEEREVALUATORTRAININGPROGRAM-FINAL-APRIL-2017-Merged.pdf)
(<https://pacificaidnetwork.org/files/2017/04/PEEREVALUATORTRAININGPROGRAM-FINAL-APRIL-2017-Merged.pdf>)
 - This 10-module manual was produced to train the Peer Evaluators - reproduced and adapted from the original with the permission of the Public Health Agency of Canada. It provides an overview of evaluation approaches and methods as well as exercises for building an evaluation plan, developing and implementing data collection tools, conducting data analysis, and sharing evaluation findings. The [References and Resources](https://pacificaidnetwork.org/files/2017/04/References-and-Resources-for-Peer-Evaluators-Training-FINAL-APRIL-2017.pdf) (<https://pacificaidnetwork.org/files/2017/04/References-and-Resources-for-Peer-Evaluators-Training-FINAL-APRIL-2017.pdf>) document provides links and more information on the topics covered in each module of the training manual.

Supporting and Compensating Peer Workers

5. [PAN Policies and Procedures for Peer Work](https://pacificaidnetwork.org/files/2018/09/PAN_Policies_and_Procedures_for_Peer_work_2018_final.pdf) by PAN
(https://pacificaidnetwork.org/files/2018/09/PAN_Policies_and_Procedures_for_Peer_work_2018_final.pdf)
 - PAN developed policy and procedures to support people with lived experiences in employment and volunteer positions at PAN.
6. [PAN's CBR Tip Sheet – Compensating Peer Researchers](https://pacificaidnetwork.org/files/2014/06/CBR-Tips-Compensating-Peer-Researchers-Pacific-AIDS-Network-Final.pdf) by PAN
(<https://pacificaidnetwork.org/files/2014/06/CBR-Tips-Compensating-Peer-Researchers-Pacific-AIDS-Network-Final.pdf>)
 - This resource from community-based research (CBR) can be applied to evaluation. PAN developed this tip sheet with a provincial working group to outline some important considerations to take into account when developing compensation plans and policies.

Data Party: Participatory Approach to Sharing Evaluation Findings

7. [The Data Party: Involving Stakeholders in Meaningful Data Analysis](https://lib.dr.iastate.edu/cgi/viewcontent.cgi?article=1003&context=extension_research) by Nancy K. Franz
(https://lib.dr.iastate.edu/cgi/viewcontent.cgi?article=1003&context=extension_research)
 - An article that demonstrates the value of stakeholder involvement in research and program needs assessment, design, implementation, evaluation, and reporting.
8. [You Are Invited to a Data Party!](https://communitysolutions.ca/web/wp-content/uploads/2018/02/Data-Parties-5Ws.pdf) by Community Solutions: Planning and Evaluation
(<https://communitysolutions.ca/web/wp-content/uploads/2018/02/Data-Parties-5Ws.pdf>)
 - Infographic of five W questions (plus a how!) to get you started thinking about a data party.

Meta Evaluation: Evaluation of Evaluation

9. [Meta Evaluation of the PLDI Impact Evaluation](https://pacificaidnetwork.org/files/2018/01/Final-PLDI-Meta-Evaluation-Report-Midpoint-and-Project-End-FINAL.pdf) by PAN
(<https://pacificaidnetwork.org/files/2018/01/Final-PLDI-Meta-Evaluation-Report-Midpoint-and-Project-End-FINAL.pdf>)
 - This report summarizes findings from a meta evaluation (i.e. an assessment of the evaluation process itself) of PAN's Positive Leadership Development Institute's (PLDI) Impact Evaluation.