



## Meta Evaluation:

# Positive Leadership Development Institute Impact Evaluation

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PREPARED FOR:

Janice Duddy, Director, Evaluation and Community-Based Research  
Pacific AIDS Network

PREPARED BY:

Elayne McIvor (Vlahaki), Principal Consultant  
Catalyst Consulting Inc.

(604) 628 - 6353

[elayne@catalyst-consulting.ca](mailto:elayne@catalyst-consulting.ca)

[catalyst-consulting.ca](http://catalyst-consulting.ca)



## Acknowledgements

This report summarizes findings from a meta-evaluation of Pacific AIDS Network's (PAN) Positive Leadership Development Institute's (PLDI) Impact Evaluation. We would like to thank the PLDI Impact Evaluation Steering Committee, Peer Evaluators, and PAN staff and contractors for supporting this meta-evaluation process.

PAN wishes to thank the Public Health Agency of Canada (the views expressed herein do not necessarily represent the views of the Public Health Agency of Canada) and REACH 2.0 for the financial support to conduct this meta-evaluation.

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## 1.0 Executive Summary

The Pacific AIDS Network (PAN) conducted an [impact evaluation](#) of its [Positive Leadership Development Institute \(PLDI\)](#) - a leadership training program for people living with HIV/AIDS in BC. PAN initially planned to hire an independent evaluation consultant to conduct this assessment and meet obligations to the funder, the Public Health Agency of Canada. However, PAN saw the opportunity to adopt a participatory evaluation approach involving people with lived experience given the alignment with PLDI's peer leadership and capacity building philosophy.

The core PLDI evaluation team was invited to participate in meta-evaluation activities at two different time points - mid-way through the project; and upon project completion. For the midpoint evaluation, the core PLDI evaluation team was invited to participate in an online survey to assess early successes and challenges of adopting a participatory evaluation approach involving Peer Evaluators. Upon the completion of the PLDI Impact Evaluation, members of the core evaluation team were invited to participate in a telephone interview to explore satisfaction with the evaluation process, project successes, challenges, and lessons learned.

Findings from this meta-evaluation demonstrated that the PLDI Impact Evaluation was a success. Evaluation participants reported that the initial goals and objectives of the assessment were highly achieved, and that the initial evaluation questions were well answered. Despite substantial time and resource constraints, participatory and peer evaluation approaches were fully adopted to assess the impacts of this peer leadership program. The successful adoption of these innovative evaluation approaches was supported by a culture of learning, flexibility, and trust within the PLDI evaluation team. Other key factors for success included the diversity of stakeholders engaged in the evaluation process, adherence to the GIPA/MIPA principles, and strong leadership and commitment from PAN support staff.

This evaluation showed the value of adopting both peer and participatory evaluation approaches, such as capacity development for the peers engaged and enhanced richness of the resulting findings. Key learnings from the PLDI Impact Evaluation process should be kept in mind when adopting similar evaluation approaches in the future.

Findings from the meta-evaluation should be collaboratively reviewed with the core evaluation team. As outlined in the PLDI Impact Evaluation communications plan, findings from this meta-evaluation should be shared with key stakeholders who are interested in adopting peer or participatory evaluation approaches. Meta-evaluation findings should also be shared with key decision-makers and funders that supported the impact evaluation along the way. Given the novelty of the evaluation approaches adopted, PAN should consider publishing an article summarizing meta-evaluation findings in a program evaluation journal, such as a 'Practice Notes' article in the Canadian Journal of Program Evaluation. Communications to these audiences should be tailored depending on their respective interests in the meta-evaluation findings.

## 2.0 Background

The Pacific AIDS Network (PAN) conducted an [impact evaluation](#) of its [Positive Leadership Development Institute \(PLDI\)](#) - a leadership training program for people living with HIV/AIDS in BC. PAN initially planned to hire an independent evaluation consultant to conduct this assessment in order to meet funding obligations to the Public Health Agency of Canada. However, PAN saw the opportunity to adopt a participatory evaluation approach involving people with lived experience given the alignment with PLDI's peer leadership and capacity building philosophy and the organization's commitment to inclusive, meaningful involvement of people living with HIV. Participatory evaluation is "an approach that involves stakeholders of a programme or policy in the evaluation process" and values insiders' knowledge, subjectivity, the empowerment of stakeholders, and community-centered approaches (Chouinard, 2013; Datta, 2013; Zukoski & Luluquisen, 2002). PAN engaged people living with HIV as Peer Evaluators in the impact evaluation, who had limited evaluation experience at the time of hiring but were trained by PAN to conduct the impact evaluation.

PAN's peer evaluation training sessions were modified from an evaluation skills training manual created by the Public Health Agency of Canada for public health audiences. The final peer evaluation training manual is a ten-module resource and is available on [PAN's website](#) so that it may be adopted by other organizations interested in collaborating with and training people with lived experience to conduct evaluation projects.

The revised peer evaluation training manual was designed to offer 'just-in-time' training, whereby PAN's Director of Evaluation and Community-Based Research would facilitate a session on a relevant module immediately prior to the Peer Evaluators practically applying their new learnings covered in the module. For example, the team reviewed a module on designing a stakeholder engagement plan, and then immediately went to work drafting this plan for the PLDI Impact Evaluation. Given the provincial nature of PLDI, PAN aimed to hire Peer Evaluators living across the province as opposed to exclusively working with those based in Vancouver.

PAN's use of participatory evaluation was somewhat innovative and unique given the lack of literature and resources documenting the practical application of the approach. As a result, PAN treated this evaluation as an experiment that would require learning and adaptation along the way. PAN contracted Catalyst Consulting to conduct a meta-evaluation of the PLDI impact process (i.e. an assessment of the PLDI evaluation process itself) in effort to document their successes, challenges and lessons learned in using this approach.

## 3.0 Methods

The core PLDI evaluation team<sup>1</sup> was invited to participate in meta-evaluation activities at two different time points - mid-way through the project; and upon project completion. For the midpoint evaluation, the core PLDI evaluation team was invited to participate in an online survey to assess early successes and challenges of adopting a participatory evaluation approach involving Peer Evaluators. The survey included both closed- and open-ended questions and responses were collected in December 2016.

Upon the completion of the PLDI Impact Evaluation, members of the core evaluation team were invited to participate in a telephone interview to explore satisfaction with the evaluation process, project successes, challenges, and lessons learned. The interviews were recorded and notes were made during the calls. People with lived experience were provided with an honoraria for their participation.

## 4.0 Summary of Findings: Midpoint Surveys

### *4.1 Who participated in the midpoint evaluation survey?*

A total of 12 people completed the mid-point meta evaluation survey which represents 92% of the potential respondents (n = 13). There was an even distribution of Peer Evaluators, Steering Committee members, and PAN staff/contractors that completed the survey (i.e. 4 responses per group).

### *4.2 To what extent have key research and evaluation principles been met so far?*

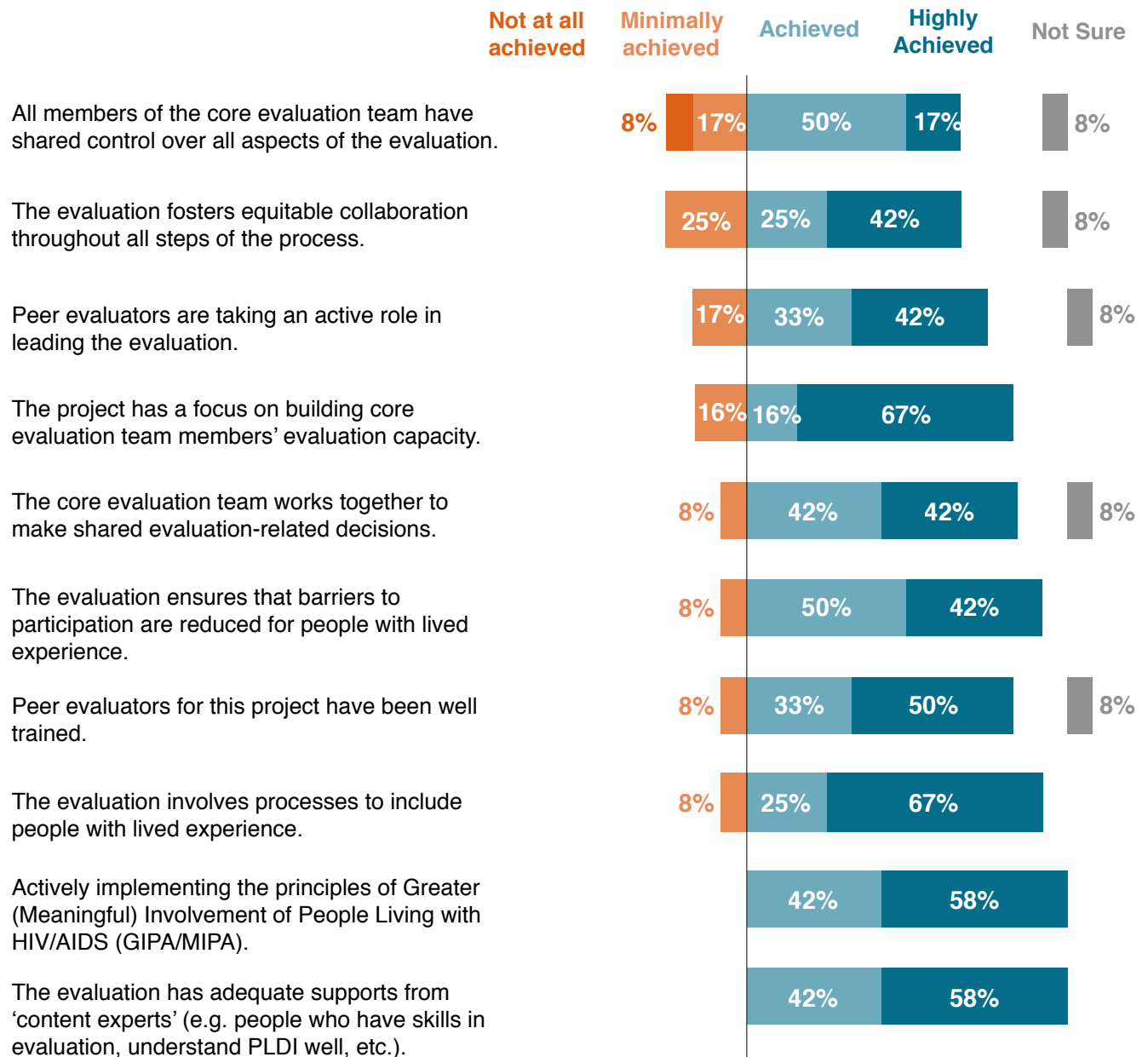
One of the online survey questions asked respondents to consider how well the PLDI evaluation has achieved key principles of conducting participatory evaluation, community-based research and/or general research/evaluation with people with lived experience. As seen in Figure 1, the majority of respondents (at least 65%; n = 8) reported that the evaluation has successfully achieved such principles so far in the project. However, roughly a quarter of the respondents reported that the following two principles have been only minimally achieved or not at all achieved:

- All members of the core evaluation team have shared control over all aspects of the evaluation.
- The evaluation fosters equitable collaboration through all steps of the process.

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<sup>1</sup> The core evaluation team supporting the impact evaluation was comprised of: Steering Committee members, Peer Evaluators and PAN staff/contractors.

Figure 1. Survey respondents' assessment of how well key research and evaluation principles have been met in the PLDI Impact Evaluation to date (n = 12)



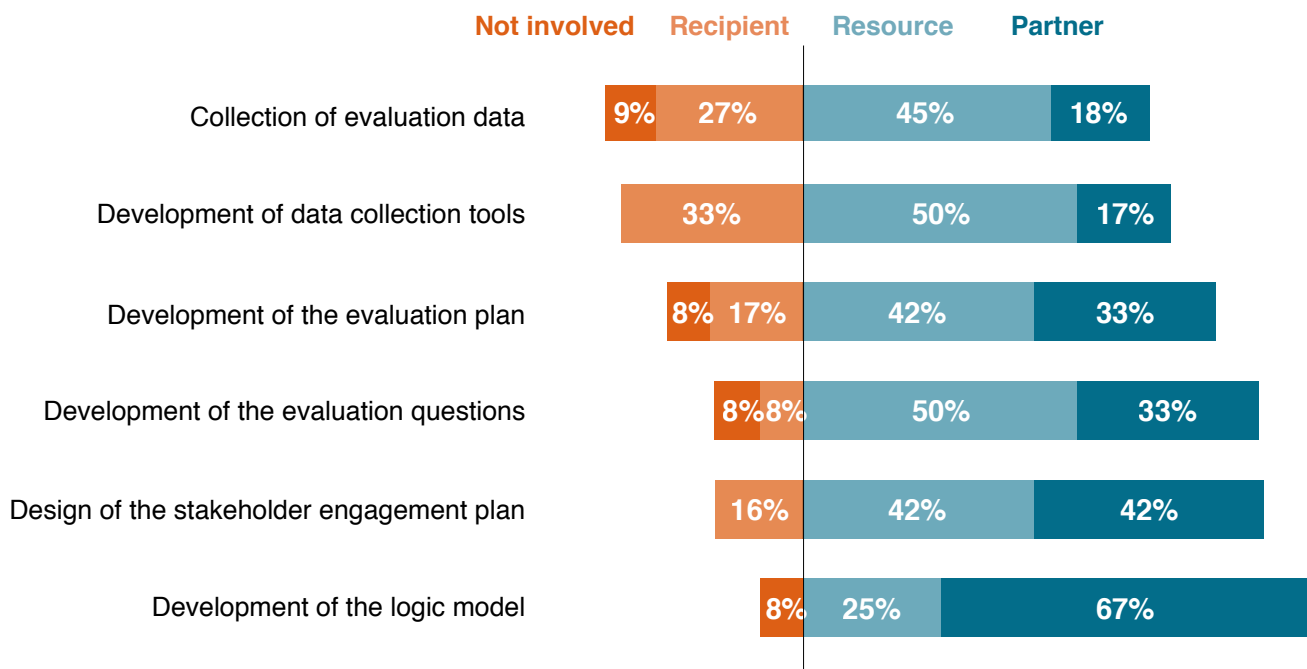
### 4.3 How have survey respondents been engaged in key evaluation activities?

Survey respondents were also asked to consider how they have been engaged in key evaluation activities that have taken place in the impact evaluation so far. Specifically, respondents were asked to specify if they have been:

- i. **not involved** in the evaluation activity
- ii. **recipients** of information about progress/decisions being made;
- iii. **resources** (i.e. providing input but the work was primary done by others); or
- iv. **partners** (i.e. decision maker and key contributors) in different evaluation activities.

As seen in Figure 2, most survey respondents (at least 63%; n = 7) felt they have been engaged as resources or partners in the majority of evaluation activities completed to date. On average respondents reported feeling more highly engaged in the development of the logic model and stakeholder engaged plan, as opposed to the development of data collection tools and actual collection of evaluation data.

Figure 2. Survey respondents' assessment of the roles they played in different aspects of the PLDI impact evaluation so far (n = 11 to 12)





#### ***4.4 What have survey respondents learned about working with Peer Evaluators so far?***

Survey respondents were asked to comment on what they have learned about the process of engaging, training and supporting a team of Peer Evaluators so far in the project. Respondents explained that they learned about the following.

- The large amount of time required to properly conduct participatory evaluation involved Peer Evaluators (e.g. time needed for training, building relationships, coming to consensus, etc.) (n = 4). One of these respondents indicated that it could be valuable to dedicate even more time to training the Peer Evaluators, including the provision of support for future employment in the field of evaluation.
- The benefits of being involved in an evaluation process with Peer Evaluators, such as development of new relationships, improved evaluation capacity for all members of the core evaluation team, and an improved evaluation overall (n = 3).
- The benefits of a participatory evaluation process for Peer Evaluators, such as having increased knowledge about how to conduct evaluation, feelings of empowerment, and the how to appreciate diverse perspectives (n = 3).
- Respondents also described learnings about the logistics of conducting a participatory evaluation with Peer Evaluators, such as the importance of having a key point person, the value of meeting face to face, and the importance of communication as the evaluation purpose and strategy evolved over time (n = 3).
- One respondent explained that this evaluation approached addressed a ‘thirst’ for this kind of involvement among people with lived experience (n = 1).

#### ***4.5 What key elements need to be in place to truly adopt a participatory approach?***

Survey respondents were also asked to consider what key elements need to be in place to truly adopt a participatory evaluation approached based on their experience with the project so far. The respondents commonly identified the following key elements for success.

- The presence of trust, a supportive environment and trusting relationships among all core evaluation team members (n = 5).
- The availability of adequate time and money given the focus on learning, discussion and consensus-building (n = 4).
- The ability for core evaluation team members to meet frequently and in-person to have optimal results (n = 2).
- The availability of training for Peer Evaluators to develop a basic skill set in evaluation prior to the process commencing (n = 2). One of these respondents explained that peers need basic evaluation skills before they can fully and meaningfully participate in the process, noting that there was a knowledge imbalance at the start of the PLDI impact evaluation while training was taking place simultaneously with initial evaluation steps.

- Other respondents described logistical considerations for success, such as having adequate support staff and effective distance interfacing technology (n = 3).
- One respondent described the importance of having continuous communications with the evaluation Steering Committee (n = 1).
- Another respondent described the importance of having a mixture of content experts and people with lived experience (n = 1).

#### ***4.6 How has the team of Peer Evaluators impacted this evaluation so far?***

The online survey asked respondents to consider how the team of Peer Evaluators has impacted the PLDI impact evaluation so far. The respondents identified the following ways in which this approach has impacted the evaluation.

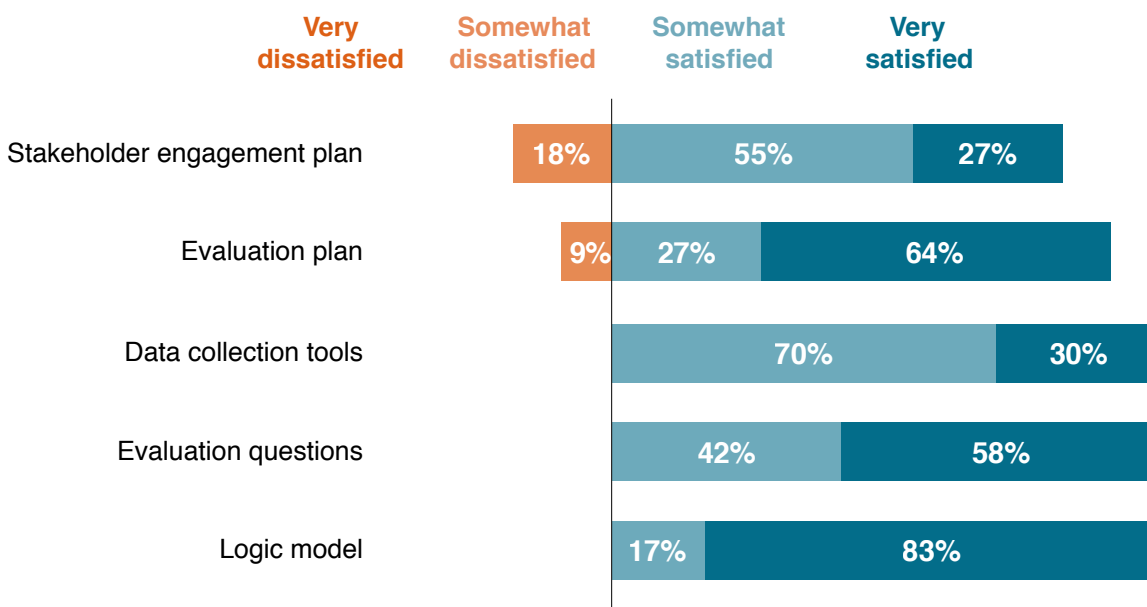
- The respondents described the invaluable lived experience and diverse/fresh perspectives the Peer Evaluators brought to the evaluation (n = 9). It was explained that their experiences and perspectives challenged traditional thinking and even improved the evaluation outputs produced (e.g. evaluation plan, evaluation questions, data collection tools, etc.) (n = 2).
- Other respondents explained that the Peer Evaluators have improved the overall relevance and potential reach of the evaluation (n = 2).
- Some respondents reported that the Peer Evaluators have been successful in asking critical questions of the evaluation process that challenged traditional thinking for the better (n = 2).
- One respondent explained that the Peer Evaluators have shifted part of the initial focus from the impact evaluation to a large focus on training (n = 1).

When responding to this question, one respondent commented on the importance of having PAN staff support when working with the Peer Evaluators. This respondent explained that PAN staff have played a critical and pivotal role in this process, helping to nurture and guide the Peer Evaluators along the way.

#### 4.7 How satisfied were survey respondents with different products of the evaluation so far?

Respondents were asked to rate their satisfaction with different products of the PLDI impact evaluation so far. As seen in Figure 3, over 80% (n = 9) of survey respondents reported being somewhat or very satisfied with the: evaluation questions; stakeholder engagement plan; logic model; evaluation plan; and the data collection tools.

Figure 3. Survey respondents' satisfaction with different products of the evaluation (n = 10 to 12)



#### 4.8 What have been the benefits of adopting a participatory approach?

The online survey also asked respondents to identify any benefits of adopting a participatory evaluation approach to evaluate the PLDI, in contrast to more traditional approaches. Respondents identified the following benefits of adopting this approach.

- The diversity of voices, experiences, skills and competencies brought forward by the different stakeholders involved with the evaluation (n = 5).
- Evaluation skills and capacity development for the Peer Evaluators (n = 5).
- Alignment of the participatory approach with the GIPA/MIPA principles<sup>2</sup> and PLDI philosophy (n = 4).
- A more relevant and contextualized evaluation given Peer Evaluators' lived experiences (n = 4).
- A sense of ownership over the evaluation, which encourages a shared responsibility that evaluation is done correctly (n = 1).

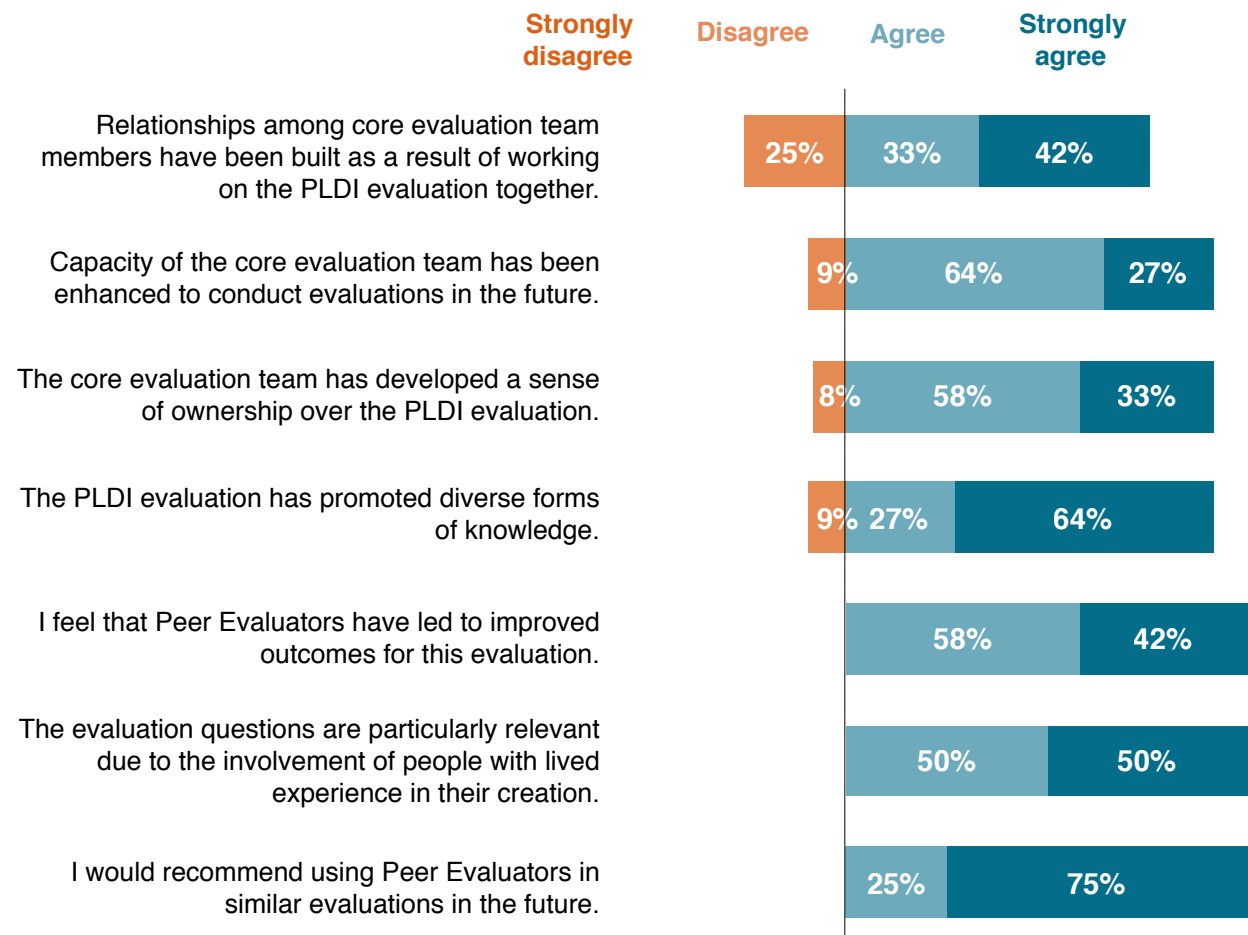
<sup>2</sup> The Greater (Meaningful) Involvement of People Living with HIV/AIDS (GIPA/MIPA) are principles that aim to realize the rights and responsibility of people living with HIV, including their right to self-determination and participation in decision-making processes that affect their lives.

Survey respondents were also asked to rate their agreement with a series of statements assessing the benefits of adopting a participatory evaluation approach for the PLDI impact evaluation. Over 90% of the survey respondents either agreed or strongly agreed with the following statements (see Figure 4).

- Capacity of the core evaluation team has been enhanced to conduct evaluations in the future (91%; n = 10).
- The core evaluation team has developed a sense of ownership over the PLDI evaluation (91%; n = 11).
- The PLDI evaluation has promoted diverse forms of knowledge (91%; n = 11).
- I feel that Peer Evaluators have led to improved outcomes for this evaluation (100%; n = 12).
- The evaluation questions are particularly relevant due to the involvement of people with lived experience in their creation (100%; n = 12).
- I would recommend using Peer Evaluators in similar evaluations in the future (100%; n = 12).

Most respondents also agreed or strongly agreed (75%; n = 9) that relationships among core evaluation team members have been built as a result of working on the PLDI evaluation together, whereas a quarter of the respondents disagreed with this statement (25%; n = 3).

**Figure 4. Survey respondents' level of agreement with statements assessing the benefits of adopting a participatory evaluation involving Peer Evaluators (n = 11 to 12)**



#### ***4.9 What have been some of the challenges of adopting a participatory approach to evaluate the PLDI to date?***

Survey respondents were also asked to share some of the challenges of adopting a participatory evaluation approach to evaluate the PLDI so far. Commonly identified challenges included the following themes.

- Time and labour intensive process due to the need for an intensive training process alongside the conduction of a participatory impact evaluation process (n = 7). Two of these respondents explained that it would have been ideal if there was more time for training and mentoring prior to commencing the actual evaluation process.
- Differing levels of evaluation knowledge, skills and capacity, including understandings of how to conduct participatory evaluations (n = 4).
- Finding effective technology platforms to effectively connect and collaborate across geographical distances (n = 2).
- The approach required experts to critically question evaluation theory/methodology and whether fundamental practices are justified (n = 1).
- Communication about the PLDI evaluation process could have been improved at times (n = 1).

#### ***4.10 Has there been adequate time and funding to conduct the PLDI evaluation?***

Respondents were specifically asked whether there has been adequate time and funding to conduct the PLDI evaluation so far. In terms of funding, most respondents indicated that they were unsure if adequate funding has been available (58%; n = 7). Small but similar numbers of respondents reported that there has (17%; n = 2) and has not been adequate funding for the evaluation (25%; n = 3).

With regards to the time available to conduct the evaluation, half of the respondents reported they were unsure if adequate time has been allotted (50%; n = 6). Most of the other respondents indicated that inadequate time has been available to conduct the evaluation (42%; n = 5), whereas one respondent found the evaluation timeframe to be adequate (8%; n = 1).

#### ***4.11 What feedback do survey respondents have about the evaluation training sessions?***

A series of the survey questions focused on gathering feedback about the evaluation training sessions provided to the Peer Evaluators and Steering Committee members. The majority of respondents reported that they were either somewhat satisfied (42%; n = 5) or very satisfied (33%; n = 4) with the evaluation training sessions that were delivered. A quarter of the survey respondents indicated that this survey question was not applicable to them (25%; n = 3).

Survey respondents were also asked if they have used any of the information they learned during the training sessions in the PLDI evaluation or other research/evaluation projects. Half of the respondents indicated that this question was not applicable to them (50%; n = 6). However a third of the respondents indicated that they have applied information from the trainings (33%; n = 4), whereas the remaining

respondents reported that they have not (17%; n = 2). Those that have used learnings from the trainings explained that they have applied them in other projects involving: ethics; GIPA/MIPA principles; participatory evaluation; and impact evaluations.

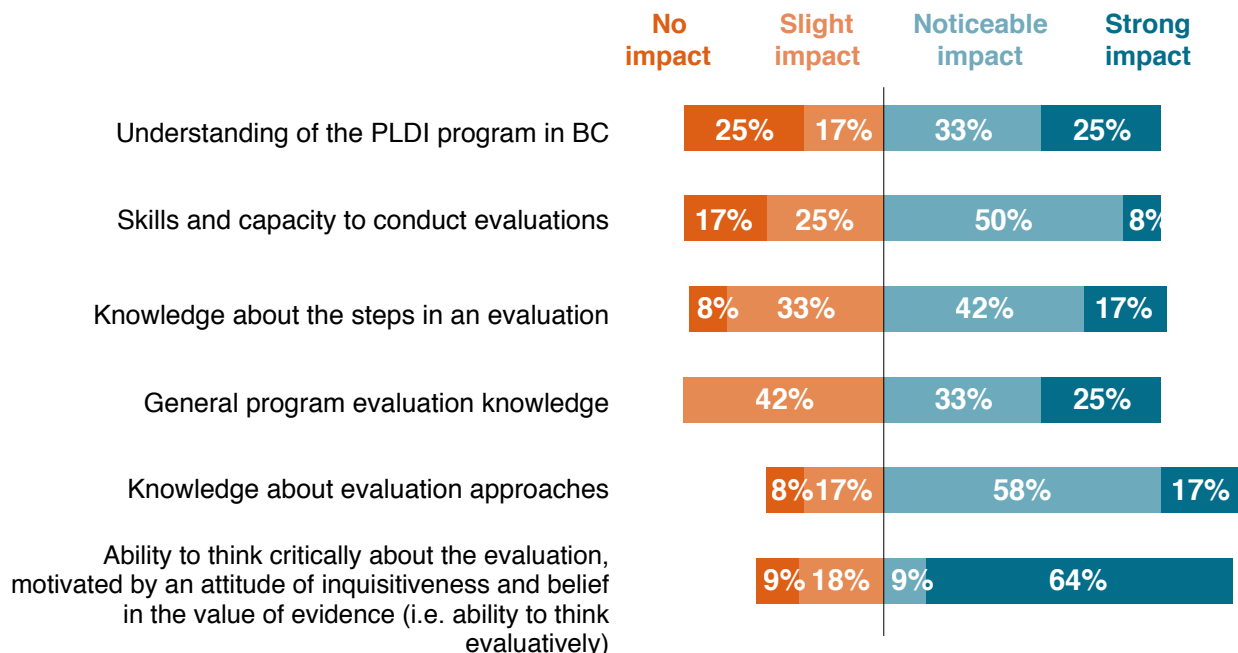
When asked how to improve the evaluation training sessions moving forward, the respondents put forward the following suggestions.

- Offer both in-person and online options to participate in the training sessions (n = 3).
- Spend less time on teaching the group on how to conduct the different evaluation activities and dedicate more time for learners to practically apply their new learnings (n = 2).
- Prepare the evaluation training modules as a package in advance of the training sessions commencing (n = 2).

#### 4.12 What impact has the PLDI evaluation had on core evaluation team members' knowledge and skills?

One of the online survey questions specifically asked respondents to assess any impact the PLDI evaluation has had on their evaluation knowledge and skills to date. As seen in Figure 5, most respondents reported that their involvement in the PLDI evaluation has had a noticeable or strong impact on different areas of their evaluation-related knowledge and skills. Strongest areas of impact included respondents': (i) knowledge about evaluation approaches (e.g. participatory evaluation); and (ii) ability to think critically about the evaluation about the evaluation, motivated by an attitude of inquisitiveness and a belief in the value of evidence (i.e. ability to think evaluatively).

Figure 5. Survey respondents' ratings of any impact the PLDI evaluation has had on their evaluation knowledge and skills (n = 11 to 12)



#### ***4.13 How can the PLDI evaluation process be improved in the future?***

When asked how the PLDI evaluation process or similar participatory evaluations could be improved in the future, respondents provided the following suggestions.

- Schedule more face-to-face meetings (n = 1)
- Ensure sufficient time is allocated to training and development for Peer Evaluators (n = 1)
- Increased funding and staff support for similar participatory evaluations due to the time consuming and labour intensive nature of the approach (n = 1)
- Focus on building a strong and cohesive team prior to commencing the evaluation (n = 1)
- Increase focus on mentorship between Peer Evaluators and other members of the core evaluation team (n = 1).
- Focusing on a particular aspect of the impact evaluation of PLDI given the large scope of the project (n = 1)
- More communication/updates to the Steering Committee about how the process is going (n = 1)
- Look to findings from the PLDI impact evaluation to determine areas for improvement (n = 1)

One respondent reported that the PLDI impact evaluation has been a good model for future participatory evaluations. They explained that the importance of starting with a clear step-by-step outline of the evaluation steps and process to improve understanding about how evaluations are conducted and why.

#### ***4.14 Other feedback from survey respondents***

Survey respondents were asked if they had any other feedback about the PLDI evaluation process to date. Most shared positive feedback and appreciation for the project to date, particularly acknowledging the hard work and leadership of PAN staff throughout the process. Two respondents explained that this meta evaluation survey has come too soon in the PLDI evaluation process to be able to answer some of the questions about the outcomes of the project (n = 2).

## 5.0 Summary of Findings: End of Project Interviews

### *5.1 Who participated in the end of project interviews?*

A total of 8 PLDI team members participated in the end of project interviews, which represents 57% of the potential respondents (n = 14). Interviewees included representation from members of the Steering Committee (n = 3), the Peer Evaluators (n = 3), and PAN support staff (n = 2). It is important to highlight that some interviewees represented multiple perspectives, such as Steering Committee members that were past PLDI graduates. Three core PLDI team members declined to participate in an interview.

### *5.2 How were interviewees involved in the data collection process?*

Interviewees were asked to describe how they were involved in the data collection process for the PLDI Impact Evaluation. Steering Committee members reported different levels of involvement in the data collection process. Some reported that they reviewed questions drafted in the data collection tools and provided the Peer Evaluators with feedback, as well as general guidance on their approach (n = 2). Other Steering Committee members reported that they were not involved in the data collection process (n = 1).

Peer Evaluators explained that they were involved in all aspects of the data collection process, including designing the data collection tools and questions, conducting interviews and focus groups, and acting as note takers during interviews and focus groups (n = 3).

The PAN support staff explained that they trained the Peer Evaluations on how to collect data and supported them as needed throughout the data collection process, such as providing them with guidance when brainstorming the interview questions (n = 2). PAN staff also acted as note takers during some of the focus group and interviews.

### *5.3 How satisfied were interviewees with the data collection process?*

All interviewees reported being satisfied with the data collection process overall (n = 8). When describing their satisfaction A Steering Committee member explained that the data collect process yielded some “very useful and pertinent information”. Another Steering Committee member reported feeling impressed with the amount of data that was collected, especially working with a team of fairly novice evaluators.

One Peer Evaluator reported that that data collection process could have been improved if they had the opportunity to practice collecting information through each of the methods employed in the PLDI Impact Evaluation. They stated that it “would have been more beneficial to have my finger in more parts of the pie. For example, I couldn’t do the interview data collection because they needed my help with something else”.



#### **5.4 What did interviewees learn as a result of being involved in the data collection process?**

Interviewees were asked to explain what they learned as a result of being involved in the PLDI evaluation data collection process. Interviewees commonly described the importance of embracing the organic nature of the data collection process and trust in the process along the way (n = 3). Others reported that the data collection process took longer than expected, which resulted in the process feeling somewhat rushed (n = 3). One interviewee explained that the evaluation time constraints also limited the learning process for some of the Peer Evaluators that wanted to engage in deeper learning and critical thinking. In addition, a couple of interviewees also reported learning about how to conduct effective interviews, surveys and focus groups (e.g. how to develop effective questions and how to build rapport with respondents) (n = 2).

#### **5.5 How were interviewees involved in the data analysis process?**

Interviewees were also asked to describe how they were involved in the data analysis process, if at all. Steering Committee members reported that they were not involved in the data analysis process (n = 3). PAN support staff reported that while they initially intended on engaging Peer Evaluators in coding the data and writing up the findings, time and skills/capacity constraints demonstrated to be substantial barriers to this process (n = 2). One PAN support described this challenge further:

*“We wanted to follow best practices of adopting a truly participatory analysis process, but when we looked at doing that there wasn’t much information available on how to go about it. We first started talking about teaching PEs to code qualitative data, but when we brought up the terminology we didn’t get uptake. It was hard to teach people how to do analysis. We had 200 pages of interview data and 40 page focus group transcript, alongside a deadline to meet”.*

PAN support staff explained that they adopted an alternate process to engage Peer Evaluators in the data analysis process. Peer Evaluators were invited to a meeting to share common themes they heard throughout the data collection process. These common themes were then employed as an analysis framework or a coding dictionary for PAN support staff to use while analyzing the data. PAN support staff explained that this process translated into a more relevant and focused reading of the qualitative data and provided Peer Evaluators with an opportunity to feel heard.

While Peer Evaluators mentioned the opportunity to discuss common themes from the data, they reported not feeling engaged in the analysis process overall. Their comments include the following:

- *“I was not as involved as I would have liked to been...like in putting together the final report and looking at the numbers. It was a timing challenge”.*
- *“I wasn’t really part of it the analysis...just one meeting at the end where we discussed the data and shared ideas about what we heard...I would have loved to be part of the analysis more”.*
- *“I didn’t feel connected to the final document. We met and went through the data and tried to find key pieces and themes – group discussion. We were involved in that part.”*

### ***5.6 How satisfied were interviewees with the data analysis process?***

Interviewees reported being generally satisfied with the data analysis process. A Steering Committee member reported that “the findings are pertinent to what PHAC needs and will be useful as a marketing tool for PLDI in the future”. As outlined above, Peer Evaluators expressed desire to be more involved in the data analysis process. PAN support staff reported that the data analysis process was a positive team building experience (n = 2).

### ***5.7 How satisfied were interviewees with the plan to disseminate findings?***

Peer Evaluators and PAN support staff created a communications plan to guide the dissemination of findings from the PLDI Impact Evaluation. Interviewees that had reviewed the communications plan were satisfied with its content (n = 6). Many explained that the first priority was to share the findings with PHAC in an academic style report, which has been completed. As a next step, interviewees expressed interest in developing some community-friendly reporting methods, such as eye-catching summary reports, brochures to market PLDI, poster presentations, a short video, and a multi-coloured picture book. One Steering Committee member described the depth of information within the findings and the importance of now using the findings to inform learning and adaptation within PLDI and beyond. In addition, a PAN support staff explained that people with lived experience have positively shaped the communications plan, indicating that the findings first need to be shared back with the PLDI community and then to the wider community after in order to maintain a respectful process of sharing information.

### ***5.8 How useful were the evaluation training sessions?***

Most interviewees reported that the evaluation training sessions led by PAN support staff were very useful throughout the PLDI Impact Evaluation process (n = 6). Interviewees were particularly satisfied with the ‘just-in-time’ learning technique PAN staff used and the opportunity to learn from previously developed examples (n = 4). One interviewee expressed appreciation for the respectful learning environment that was fostered during the training sessions, as it provided them with a space to ask questions and learn at their own pace.

Half of the interviewees reported improvements in the self-esteem and capacity to conduct future evaluations as a result of participating in the evaluation training sessions (n = 4). The following quotes illustrate how interviewees’ self-esteem was enhanced:

- *“...my self esteem is boosted...I come with pre-conceived notions that I am not going to be heard and not taken seriously but now I feel like I can walk into a room with peers and feel like I’m not a sore thumb”.*
- *“I realized that I am valuable to this team. I felt like the expert. “*

Half of the interviewees also reported that they have been able to apply the knowledge and skills they developed during the evaluation training sessions in other contexts (n = 4). These interviewees explained that they have been able to apply their learnings to the conduction of other research and evaluation projects, such as how to collect qualitative and quantitative data. Another interviewee reported that the training sessions taught them how to foster more collaborative approaches within other research and evaluation projects. One interviewee reported that they examine evaluations being conducted in the community with a higher level of interest and a more critical eye. Some of their comments included the following:

- *“I have been able to use the idea of how to get teamwork instead of telling people to do it in a top down way. It has helped me along. It is changed a lot of my focus on how to build collaboration...It has made me more collaborative in my approaches at work.”*
- *“Yes, learnings have translated. The technical piece – the way we communicate, the terminology we use, things that are important to focus on, how to scope projects... There are a lot of learnings that I take away from it. I also look at evaluations being conducted in the community with a more critical eye and detail”.*
- *“I have been able to bring some of the tools I learned from this job into other projects. Like using the logic model and looking at different outcomes and data – quant and qual.”*

Interviewees also shared some ideas for how the evaluation training sessions could be improved in the future. Some reported that more time was needed for trainees to absorb the information, identify gaps in knowledge, and develop a true understanding of the concepts (n = 4). Other interviewees reported that while the just-in-time training approach was effective, it would have been beneficial to have all of the learning materials in advance so trainees could read ahead and gain an understanding of the larger evaluation process (n = 3). Finally, some interviewees reported challenges with learning by distance if when they participated in trainings virtually, such as connection issues and feelings of isolation (n = 2). Some of their comments included the following:

- *“More time. They needed more time to absorb and mull over their ideas and gaps in knowledge”.*
- *“Sometimes I like to have stuff more in advance to prep and read through”.*
- *“The training manual wasn't completed before the Peer Evaluators started. Because of the time constraints, we had to build the training modules as we went along. If we could do it again, it would be helpful if people could have the manual as soon as the project started. Some people wanted to be able to read forward and see training piece in one place”.*
- *“I think the only issue was technology. Linking either through Skype or through teleconference. There always seemed to be an issue”.*

## 5.9 What were key learnings for interviewees from the evaluation process?

Interviewees were also asked to describe their key learnings from the PLDI Impact Evaluation process. Their comments have been grouped into the following list of common themes.

- Participatory evaluation processes require substantial time and resources, but are worth the investment (n = 4).
- There is value in learning from a diversity of perspectives and different ways of knowing throughout evaluation processes (e.g. learning from people with lived experience) (n = 4).
- The importance of being flexible and ability to trust in the organic participatory evaluation process (n = 5).
- The importance of fostering an environment of trust and respect in order to create a space for meaningful learning to take place for all stakeholders (n = 3).
- The importance of balancing funder accountability requirements with generating useful data to inform learning and adaptation within the project (n = 2).
- Improved understanding of how to conduct evaluations projects from start to finish (n = 2).
- Improved understanding of how to use online meeting and collaboration tools online (e.g. Google Docs) (n = 2).
- The value of adopting bottom-up, collaborative evaluation process that may take longer than top-down approaches (n = 2).
- Learning how to be compassionate and empathic when collecting evaluation data from people with lived experience (n = 1).

Some of their comments included the following:

- *“Regardless of educational background, lived experience has a lot of value. We sat at the table with people that had very challenging lives in the Downtown Eastside and they came through it... their experience adds an extra rich layer. Their stories encouraged me to keep an open-mind”.*
- *“The other key learning is that you have to be super flexible with your timelines and expectations. It was critical to be able to trust the process”.*
- *“I think it brought home to PAN that life still goes on for people. We might have a deadline by Wednesday, but that has to be flexible. Life still happens”.*
- *“The conversations I had with peers were so helpful. They taught me to be compassionate, use empathy and understand other people”.*

### **5.10 How did employing a team of Peer Evaluators change the evaluation?**

Another interview question explored how employing a team of Peer Evaluators may have changed the PLDI Impact Evaluation process. Many interviewees explained that the involvement of Peer Evaluators enhanced the relevance of the questions that were asked and the richness of the data collected (n = 6). Others reported that the Peer Evaluators were able to build rapport faster and deeper with peer evaluation participants given their shared lived experiences. PAN support staff also described the value of having Peer Evaluators contextualize the data collected prior to analysis taking place (n = 2). Some of the interviewees' comments illuminating these themes included the following:

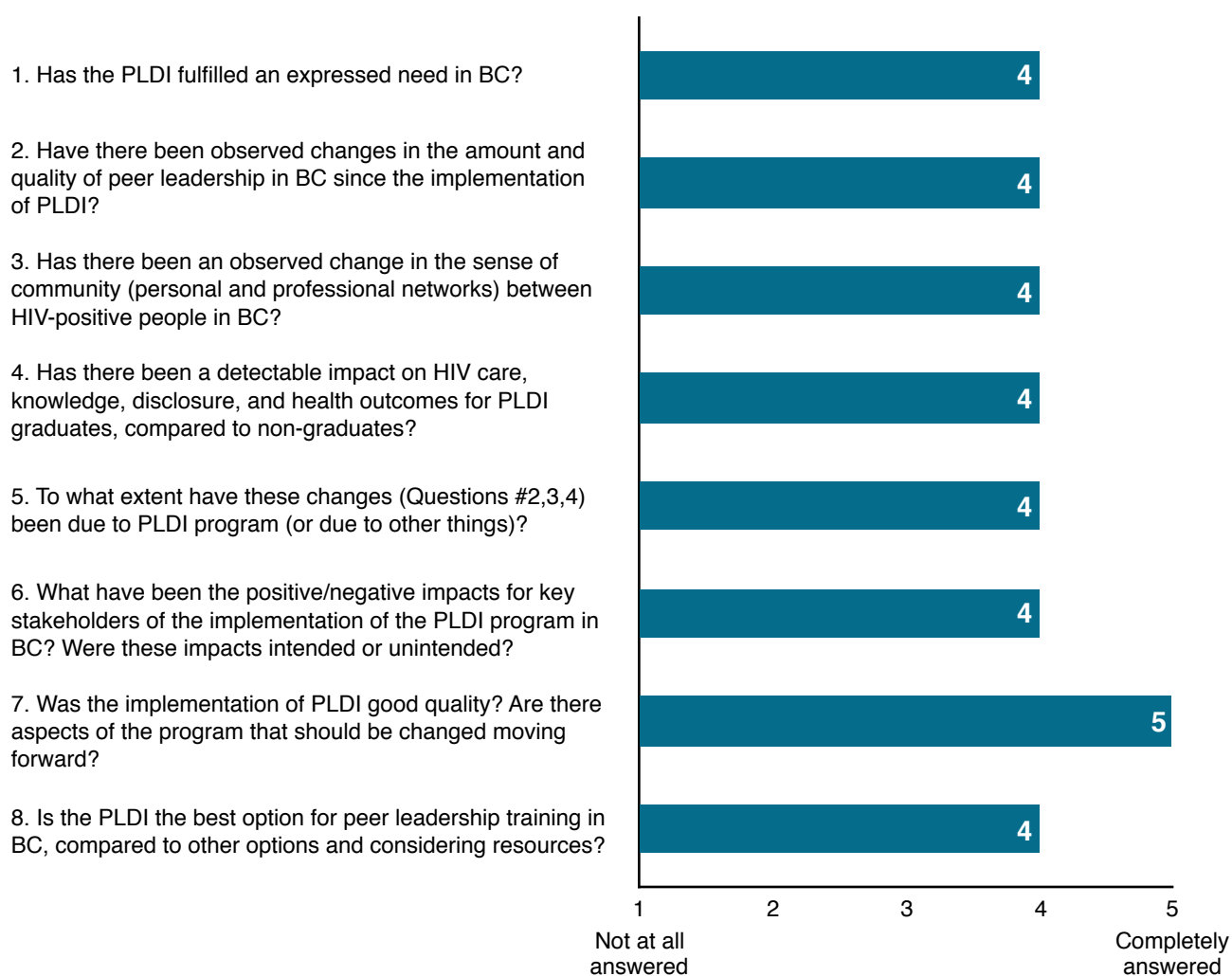
- *“We brought our own experience to the table, so it helped create richer questions.”*
- *“I think it made the resulting data richer. Having Peer Evaluators made it easier for them to build positive relationships with the respondents. It made the questioning more relevant.”*
- *“I think the data and information that we got was richer as a result of having the Peer Evaluators on-board. Peers' lived experience really helped focus the questions...made them more appropriate by using the language that people were using.”*
- *“Peers created this rapport that might not be as easy to achieve with a professional outside of the peer group. People were so much more open... details in our interviews were really intimate.”*
- *“Their ability to contextualize what people heard in the data synthesis session was so helpful. They defined terms relative to their understanding of lived experience, which really enriched the analysis.”*

Interviewees were also asked to describe any challenges associated with employing a team of Peer Evaluators. PAN support staff and Steering Committee members reiterated the substantial time required to train and support Peer Evaluators to carry out the assessment, particularly given their limited initial evaluation capacity (n = 4). Some explained that it was difficult for PAN support staff to cater to each of the Peer Evaluators' unique learning styles throughout the evaluation training sessions (n = 3). Given that the evaluation was condensed into such a short period of time, one interviewee suggested that PAN could have compensated Peer Evaluators in a more fair and respectful manner (n = 1).

### 5.11 How well were the initial PLDI Impact Evaluation questions answered? Were goals and objectives met?

Interviewees are asked to rate how well each of the initial PLDI Impact Evaluation questions were answered on a scale from 1 to 5 (where 1 = ‘not at all answered’; and 5 = ‘completely answered’). As seen in Figure 6, interviewees reported that the initial evaluation questions were very well answered. The evaluation question exploring whether the implementation of PLDI was of good quality and areas for improvement was rated as ‘completely answered’ by interviewees.

Figure 6. Interviewees’ ratings of how well the initial PLDI Impact Evaluation questions were answered (n = 8)



Interviewees were asked whether the PLDI Impact Evaluation met its initial goals and objectives, which were to: (i) determine whether PLDI is meeting its intended objectives and outcomes; (ii) get concrete data on PLDI participants’ experiences as a result of the training; (iii) learn about how to improve and grow PLDI program; and (iv) measure impact of the program. All interviewees reported that the the evaluation’s initial goals and objectives were fully met.

### ***5.12 What was unanticipated in the PLDI Impact Evaluation?***

Interviewees were asked to describe unanticipated learnings or outcomes resulting from their participation in the PLDI Impact Evaluation process. They reported that they did not anticipate the following:

- the amount of training and capacity building Peer Evaluators required and the challenge of catering to different learning styles and personalities (n = 4);
- the amount of ongoing adaptation and flexibility that was required throughout the evaluation given the new and innovative nature of the approaches employed (n = 3);
- sense of camaraderie and support among the Peer Evaluators and PAN support staff (n = 3);
- personally feeling more connected to the local HIV/AIDS community and being motivated to pursue a professional career in the field (n = 2);
- the need for PLDI's reach to be expanded and better supported across BC (n = 1); and
- receiving negative feedback about PLDI from evaluation participants (n = 1).

### ***5.13 What factors contributed to the success of the PLDI Impact Evaluation?***

Findings from the interviews illuminated a number of factors that contributed to the success of the PLDI Impact Evaluation. The following is a list of the key factors for success identified by the interviewees.

- Diversity of stakeholders involved in the evaluation (e.g. involvement of Peer Evaluators that were and were not past PLDI participants, mixture of peers and non-peers on Steering Committee, involvement of diverse perspectives on Steering Committee, etc.) (n = 7).
- Adherence to the GIPA/MIPA principles and participatory evaluation approach throughout the project (n = 6).
- Sufficient time and resources dedicated to the evaluation process (n = 6).
- Strong leadership, passion and support from the PAN staff throughout the project (n = 6).
- Dedicated time for developing relationships among key stakeholders, which fostered trust, camaraderie, and an environment conducive to learning (n = 4).
- Treating the evaluation process as an experiment that requires flexibility, and where unexpected issues and challenges were interpreted as learnings rather than failures (n = 4).
- Support provided among Peer Evaluators to grapple with learning evaluation concepts and deal with personal issues (n = 3).
- Involvement of managers who were willing to let go of control and lead from behind (n = 3).
- Guidance and support provided by Steering Committee to Peer Evaluators (n = 3).
- Peer and participatory evaluation as the perfect fit for evaluating PLDI given the program's focus on peer leadership training and capacity building (n = 2).

- Action-oriented nature of the evaluation data that was collected and willingness to use information for future learning and improvements (n = 2).
- Establishing the Steering Committee as one of the initial steps in the evaluation (n = 1).
- PAN's willingness to take a risk on a new way of evaluation programming (n = 1).

These success factors can be illuminated by some of the following interviewee comments:

- *"It was so helpful to compare ideas with the other Peer Evaluators...this is how I interpret it... different interpretations to broaden my perspective. The diversity in the team was such a key factor."*
- *"I think it was great to have some people that had gone through PLDI and some that hadn't. Those who hadn't could question why they do things in certain ways. That was a big strength. The Steering Committee wanted a mix of non-PLDI and PLDI graduates, which was a strong decision given the different views of objectivity and stuff."*
- *"I felt really supported by PAN staff. Even if it was something I was insecure about. No stupid questions. They played huge part in making me feel like I had something to offer. I could also reach out to the other peer evaluators for support. They played a huge part in the evaluation for me."*
- *"Success was contingent on a lot of staff support. It was a major organizational commitment."*
- *"I think a success factor was that there was a strong person leading the process. They had an enthusiasm and passion for it and they knew how to lead from behind."*
- *"Evaluating PLDI with the participatory and peer approaches was a perfect fit because PLDI is this incredible program dedicated to building leadership skills among peers already".*
- *"There was one time when one of the Peer Evaluators was having a hard time in their personal life and us as peers were able to help and support that person."*

#### **5.14 What could have been done to improve the PLDI Impact Evaluation?**

Interviewees offered the following suggestions for how the PLDI Impact Evaluation process could have been improved. These suggestions can be applied when adopting similar peer and participatory evaluation approaches in the future.

- Increase the time and resources available to conduct the evaluation given the participatory and peer approaches adopted (n = 8).
- Improve communication to the Steering Committee about overall evaluation timelines and how the evaluation is progressing along the way (n = 5).



- Increase opportunities to connect in-person for learning and group work, as opposed to connecting virtually or over the telephone (n = 3).
- Maintain more realistic expectations about Peer Evaluators' initial capacities to conduct evaluation work and the time and resources required to train and support them (n = 3).
- Increase involvement from PHAC in the evaluation process (e.g. representation from PHAC on the Steering Committee) (n = 2).
- Create more community-friendly learning materials, as opposed to academic documents (n = 1).
- Provide clarity on the scope of the evaluation based on funder expectations and accountability requirements (n = 1).

Example comments from interviewees about areas for improvement including the following:

- *“This project was completed a very tight budget and schedule. Increased time and resources would be required for future projects that are similar.”*
- *“A little more clarification on the timeline of the evaluation would have been helpful. For example, we are going to do analysis this week. It would have been nice to have this information in advance rather than learning about it as it comes.”*
- *“I found there were some challenges with doing group work over the phone. It was hard to keep a tight bond between everyone...difficult to be working from the same place.”*
- *“I would probably at the beginning maybe send out a participatory model/framework... instead of doing it in a blank framework... more images, more interactive, less academic.”*
- *“I was a bit confused at the beginning about what we needed to do for the funder. Some of the questions we wanted to ask were apparently extending beyond PHAC goals, but I first thought we could do whatever we wanted. It would be good to know what the rules are from the start.”*

## 5.0 Conclusions and Next Steps

Findings from this meta-evaluation demonstrated that the PLDI Impact Evaluation was a success. Evaluation participants reported that the initial goals and objectives of the assessment were highly achieved, and that the initial evaluation questions were well answered. Despite substantial time and resource constraints, participatory and peer evaluation approaches were fully adopted to assess the impacts of this peer leadership program. The successful adoption of these innovative evaluation approaches was supported by a culture of learning, flexibility, and trust within the PLDI evaluation team. Other key factors for success included the diversity of stakeholders engaged in the evaluation process, adherence to the GIPA/MIPA principles, and strong leadership and commitment from PAN support staff.

Results from this meta-evaluation demonstrated the value of adopting both peer and participatory evaluation approaches, such as capacity development for the peers engaged and enhanced richness of the resulting findings. Key learnings from the PLDI Impact Evaluation process should be kept in mind when adopting similar evaluation approaches in the future.

Findings from the meta-evaluation should be collaboratively reviewed with the core evaluation team. As outlined in the PLDI Impact Evaluation communications plan, findings from this meta-evaluation should be shared with key stakeholders who are interested in adopting peer or participatory evaluation approaches. Meta-evaluation findings should also be shared with key decision-makers and funders that supported the impact evaluation along the way. Given the novelty of the evaluation approaches adopted, PAN should consider publishing an article summarizing meta-evaluation findings in a program evaluation journal, such as a 'Practice Notes' article in the Canadian Journal of Program Evaluation. Communications to these audiences should be tailored depending on their respective interests in the meta-evaluation findings.

## 6.0 References

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