

PAN's Checklist:

What do you need to have in place in order to be successful using a participatory evaluation approach?



Who should lead the evaluation?

People who are most affected by the program and its evaluation should lead the evaluation

- Ask yourself – who is in the best position to advocate to ensure that the evaluation beneficiaries and stakeholders are actively engaged in all aspects of the evaluation?
- Considering hiring Peer Evaluators – Peer Evaluators are people with lived experience of the target group or beneficiaries of the evaluation. Peer Evaluators should have a strong interest in evaluation and may or may not have experience with conducting an evaluation. Peer Evaluators could lead the evaluation (hired as contractors or full- or part-time employees), co-lead an evaluation with an internal or external evaluator and provide support and leadership expertise to an internal or external evaluator, or engage at any stage in the evaluation process.
- If Peer Evaluators are novice evaluators, it is essential to have an individual or a team member with evaluation experience to support learning, training and to be available in a mentor or coaching role to the Peer Evaluators.
- Peer Evaluators must be fairly compensated for their time and effort.

OUR EXPERIENCE: For PAN's Positive Leadership Development Institute (PLDI) Participatory Impact Evaluation, people living with HIV (PLHIV) led the evaluation as Peer Evaluators. Peer Evaluators received support, training and coaching from PAN staff with evaluation experience throughout the whole project. An evaluation steering committee consisting of representatives from key stakeholder groups helped guide the overall evaluation process.

Who are your evaluation stakeholders? Who needs to take part in the evaluation?

Ensure stakeholder diversity

- Ask yourself – who are the people this program is trying to serve; who are the partners or organizations playing an active role in our work; who are the funders of the program; who are the staff of the program; are there other people key to our work? These are the people who should be actively engaged in your evaluation.
- Having a diverse group at the table provides a wider scope of knowledge and experience at all steps of an evaluation. It increases critique and reflection of the evaluation process and method, and allows the evaluation to ask more comprehensive questions. Finally, it maximizes the use and sharing of findings, and ensures a more effective and rigorous evaluation process and outcomes.

Clearly define roles and encourage open communication

- When shifting to more participatory approach, team members may have to step out of traditional roles and learn to share power. Partners with evaluation expertise may need let go of control and take on a supportive coaching role, making space for evaluation beneficiaries to take on leadership roles.
- With a role shift, open communication becomes even more critical to ensure meaningful participation from all members of the evaluation team.

OUR EXPERIENCE: PAN's PLDI Participatory Impact Evaluation stakeholders included: people who participated in the PLDI program; PLDI program staff and other PAN staff with evaluation experience; community partners (i.e. community-based organizations who support people living with HIV to participate in the PLDI program; organizations who engage and hire graduates of the PLDI program); and funders. At least one representative from each of these stakeholder groups participated as a member of Evaluation Steering Committee. PAN staff with evaluation expertise let go of control and took on a supportive coaching role; while Peer Evaluators took the lead on the project and the Evaluation Steering Committee provided guidance and governance support.

What are some training and capacity-building needs to consider?

Focus on capacity-bridging

- Acknowledge that everyone on the team has capacity to build is important for fostering a learning-focused environment and deconstructing power hierarchies that traditionally divide those with academic knowledge from those in community. Working in this reciprocal manner, the team is able to achieve best outcomes.

Adopt 'just-in-time' training

- For Peer Evaluators or other team members who are new to evaluation, using a 'just-in-time' approach can bring success. A trainer can facilitate a session on a particular step in an evaluation immediately before Peer Evaluators would apply their learnings to the evaluation. For example, Peer Evaluators receive training on how to design a stakeholder engagement plan, and then immediately apply their learning by drafting this plan for the evaluation.

OUR EXPERIENCE: For the PLDI Participatory Impact Evaluation, some team members had expertise on evaluation methods and approaches while others taught the team about the PLDI program or what it means to be living with HIV. This diversity in knowledge, skills and lived experience increased everyone's capacity and enriched the learning experience for all. The Peer Evaluators were particularly satisfied with 'just-in-time' training as it provided information to the learner when they need it rather than requiring the learner to store large quantities of knowledge that may or may not be useful to their project. By reducing time between learning and applying information, learners' retention of knowledge and satisfaction with the training increased.

What resources need to be in place?

Account for necessary resources from the start

- Given the focus on learning, discussion and shared decision-making, participatory evaluation requires substantial time and resources.
- **If sufficient resources are not available, adopting this approach could pose risks for unintentional harm to stakeholders involved** (e.g. tokenism rather than meaningful engagement of stakeholders; damaged trust; unpaid work and unethical burnout especially for people with lived experience; etc.).
- Evaluation budgets need to adequately account for various resources including human resource funds (staff time, honoraria) and communication and meeting expenses to support the project from its start to finish. It is also important to budget funds for knowledge translation, dissemination, and action planning activities.

Fairly compensate all stakeholders who are not paid staff

- This is an important step to ensure power imbalances between various stakeholders are mitigated and stakeholders are able to participate equitably. People with lived experience supporting the evaluation work should be paid a wage, honoraria, or other forms of compensation (e.g. gift cards) in order to honor their time and expertise.

OUR EXPERIENCE: This participatory evaluation approach took more time and resources than we had planned for, which meant that we were not able to have our team of Peer Evaluators actively engaged in the analysis phase of work. In addition, a team approach (having four Peer Evaluators instead of one) took additional time to allow for adequate discussion and decision-making.

What are some key values and principles that should remain at the centre of evaluation?

Establish trust and relationships

- Is critical for providing a space conducive to meaningful learning for and active contributions from all stakeholders.

Be flexible and trust in the organic participatory evaluation process

- Participatory evaluation approaches look different for each team. Whatever form it takes, a substantial amount of ongoing adaptation and flexibility is required given the new and innovative nature of the approach.

OUR EXPERIENCE: Trust and relationships were foundational to provide support to Peer Evaluators when grappling with learning evaluation concepts and dealing with personal issues. The evaluation process was treated as an experiment where unexpected issues and challenges were interpreted as learnings rather than failures.

