Evaluation Support Scotland

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HEARING FROM EVERYONE

Building equality, diversity and inclusion into self-evaluation

About this guide:

Evaluation Support Scotland (ESS) believes it is important that third sector self-evaluation engages a **diverse** range of the people you support, is as **inclusive** as possible for everyone who wishes to participate, and does not perpetuate **inequalities**. This in turn makes for good and comprehensive self-evaluation evidence and means the way you collect that evidence is itself fair.

This guide shares ESS learning about building equality, diversity and inclusion into the way you evaluate the difference you make to all the people you support. It includes the **tips** that have emerged most strongly from our work with third sector organisations over the last 17 years. We link to other relevant resources on our website.

This guide is aimed at people in the third sector who already have a basic understanding of outcomes and evaluation.

What this guide is not:

- It is **not** legal advice or about how to comply with equality law
- It is **not** guidance on how to monitor or review your organisation's approach to equality, diversity and inclusion.
- It's not comprehensive. Please get in touch if you have other ideas or examples to share!

Note: we use the term "the people you support" throughout this guide. You might prefer to use another term such as "service users", "beneficiaries" or "members".

01
Give people the chance to contribute to evaluation

Involving the people you support is one of ESS's principles for good evaluation.

What we mean by this is that as a minimum:

- the people you support should have the opportunity to give feedback and know what you do with their feedback
- they are able reflect for themselves on progress
- they feel included

Staff observation can be a useful source of outcome evidence but if you solely rely on your own observations you may be making incorrect assumptions or missing key evidence.

A genuine desire to protect the people you support can sometimes slide into not giving them the choice to give feedback at all. The people you support can choose not to give you feedback but ESS believes they should have that choice.

A good way to avoid evaluation feeling onerous for the people you support is to ensure **evaluation fits the way you do your work** and the ways people engage with your services or activities. This is another of ESS's principles for good evaluation.

You might need a range of methods and to check if you need to adjust your evaluation methods so everyone can contribute. See our Support Guide – Designing evidence collection methods about making your methods fit for purpose. Our next tips also address this point further.

02
Check you are including everyone in evaluation

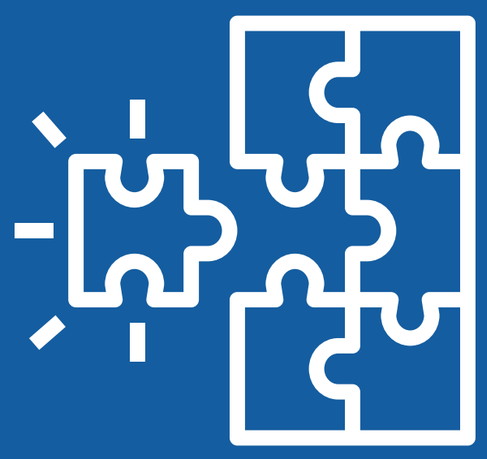
This is about evaluating your evaluation! Self-evaluation is not research so you don't need to get too hung up on "representativeness". However, if a particular subgroup of the people you support is missing from your data that might indicate a bigger problem. For example, maybe you aren't achieving outcomes with and for that subgroup and they didn't feel able to tell you. Or maybe your evaluation methods work for some, but not all of the people you support, so some are excluded.

Some questions to ask yourself:

- Are we getting evaluation feedback from everyone we support?
- If not, are there particular groups or people we are missing?
- Is there another way we can ask for evaluation feedback from these people?
- Can we draw any conclusions from the absence of data? For example, if the absence of data from a particular group is because that group dropped out of our service very early on that might suggest we need to alter the way we deliver our work for that group to keep them involved.

You should try to improve your evaluation methods to avoid excluding some of the people you support from participating in evaluation in future. At the very least you should state any limitations (who might be missing from your evaluation data) in your reports.

See also the next section on personal characteristic data.



03

Think carefully about the personal characteristic data you collect

Collecting personal characteristic data (for example someone's age or sex) can be useful for assessing impact or identifying areas for improvement. For example you might want to collect personal data to help you plan to reach new people, improve your access or clarify your niche.

We are **not providing legal advice** so please consult other sources such as the Equality and Human Rights Commission and the Information Commissioner's Office.

ESS's messages from our experience are that whatever data you collect it must be **for a purpose** (and not just for the sake of it) and you must adhere to data protection regulations.

There may be different ways carefully to obtain personal characteristic data so think about what could be most effective for you. This could include:

- Referral data provided by partners
- Your context – assumptions you can make the delivery of your service. For example if you are working in a school so you make some assumptions about the age range of those you are working with
- What people say they need from the project or how they describe themselves
- Asking people to complete a traditional "protected characteristics" form – perhaps allowing them to self-define where possible and always giving them the option to opt out.

Our "Learning from evaluation - what works" guide includes a section on "evaluating reach".

04
Involve people in designing or leading evaluation

Many third sector organisation have strong participative approaches in the design and delivery of their services: “do with, not do to”. So we think it’s good to extend that to your evaluation of services and activities by giving the people you support a chance to **design your evaluation**.

At its simplest you can ask people **how** they want to give you feedback about your activities and outcomes. That should in turn mean they are more likely to give you that feedback and that your evaluation is more inclusive.

Some organisations enable the people they support to **take a lead** over some aspect of evaluation, such as agreeing outcomes, designing methods or analysing data. The involving people section of our website has resources and case studies about how to do this well.

In ESS’s experience, the people who organisations support sometimes design methods that are more effective at measuring outcomes. They also can bring different perspectives to analysis or reporting that makes evaluation richer. The act of leading or designing evaluation can itself make people feel more included and more empowered.

05

Use people's stories and experiences in your evaluation reports

Including people’s stories and lived experiences in evaluation illuminates outcomes and presents evaluation in people’s real voices. Stories and experiences can also show the “how and why” of the achievement of outcomes and showcase learning that staff alone may not have identified.

Using stories and experiences in evaluation reports can itself help promote equality by helping the person reading the report (eg a funder, a stakeholder, a policymaker) understand what matters to the people you support.

Our “Not Just a story” workbook helps you think practically about how to collect, analyse and use this rich information. Our Stats and Stories guide helps you think about how to blend statistics and stories (or quantitative and qualitative data) in evaluation reports. You can use stories or experience as (or part of) case studies – see our case study guide. Our guides include advice on anonymity, permission and using people’s own words.

A key point is that you should always make clear if the story or case study demonstrates what tends to happen for most people you support (typical), or is it an example of when things go particularly well (exceptional)? Using either or both types can be helpful to illustrate learning, but it’s worth being clear about which type it is and why you are using it.

It’s also a good idea to put a time limit on your use of stories, even when you are doing so anonymously. Someone might be very keen to tell their story at one time in their life but later start to feel that they are being solely defined by that story or retraumatised by it. In any case it’s good practice to keep your evaluation up to date.

06
Use your evaluation

You should always **use** your evaluation – to celebrate your success, explain your work and improve it to make it even better in future.

So that means you should collect data or information you actually use. It means you should tell the people you support what you've done with their evaluation data. Think of the people you support as partners in your evaluation with a stake in its use.

You can use your evaluation to influence others (partners, funders, policymakers) to improve their equality, diversity and inclusion. For example, you might have insights about what achieves positive outcomes for people OR what is stopping the achievement of outcomes that requires actions from others. You could even also share insights about how to overcome barriers to involvement in evaluation.

Contact us for more information about this guide or how Evaluation Support Scotland could support your organisation.

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