

Engaging Science

# Evaluating *public engagement* in the Wellcome Trust's UK Centres

UK Centres' Public  
Engagement Workshop  
6-8 May 2015



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## Executive summary

**This report is based on conversations that took place at the Wellcome Trust's third annual UK Centres' public engagement workshop: 'Evaluating Public Engagement in the Wellcome Trust's UK Centres'. The workshop took place in London in May 2015.**

Evaluating public engagement is a challenging but important task. Whether researchers, public engagement staff, funders or participants in engagement activities, we should be able to understand what impact the activities are having, assess whether they are worth doing and learn how to do them better. In order to do this, we need to ask some critical questions:

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What is the public engagement trying to achieve?

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What is the purpose of the evaluation?

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Who is the evaluation for, and who will use the results?

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There are of course many challenges to evaluating public engagement. It can be hard to carry out public engagement itself, for example, due to budget constraints, or lack of enthusiasm from researchers themselves; and an additional feature of evaluation might seem too much. However, when doing public engagement, it is important to think about evaluation at the start of the activity, rather than at the end, and build in evaluation approaches from the beginning. Challenges to evaluation (SECTION 2) include those relating to cost and time, how to collect data and involve audiences, and how to share findings and feed results into future projects, all with a sense of ownership over the process.

In section 3, this report goes into detail about what we are trying to achieve with public engagement, as knowing and understanding this will influence how and what you try to evaluate. Do the outcomes you desire relate to changes in communities and the public, changes in researchers and institutions, changes in relationships between people or a mixture of all three? Evaluation approaches are different depending on what you are trying to achieve.

Some key themes in evaluation (SECTION 4) include identifying the purpose of the evaluation. Is it to demonstrate impact to funders, to be accountable? Is it to reflect and learn for future work? Is it a mixture of the two? Is it possible to identify definite impact (attribution)

or are you able to show that your activity contributed to a particular outcome? There is an increasing emphasis on practice and learning in order to improve, but how does this relate to impact? Some say that evaluation can do both, and that having a 'theory of change' can help analyse a complex situation. The nature of public engagement is, after all, a complex situation with multiple actors and relationships.

Some public engagement activities can be evaluated with traditional evaluation methods, particularly events and one-off activities which have easily definable outcomes. What about evaluating other more complex situations such as long-term engagement, engagement involving multiple actors and relationships, or a series of activities across an institute? Innovative approaches to evaluation (SECTION 5) can offer alternatives, and having a rigorous theoretical basis for an evaluation can help legitimize public engagement in scientific institutions. Realist Evaluation explicitly addresses complexity in social interventions and processes. Outcome Mapping sees outcomes as changes in the behaviour and activities of 'boundary' partners. Most Significant Change methodology uses stories of change to assess the impact of activities. These are all options, and are discussed in more detail, along with hypothetical and real examples of use.

Focusing on how the monitoring findings will be used (SECTION 6) is very helpful for planning an evaluation. Asking the following questions can be helpful:

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Who are the intended users of the evaluation?

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What are they going to use it for?

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When do you need the findings?

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Strengthening learning and evaluation of public engagement (SECTION 7) is important and ways to do this include providing peer support, sharing experience and learning, and participating in a community of practice. Access to resources is also important and some useful publications are listed in this report. Greater understanding of the constraints and pressures of doing public engagement, along with building a body of evidence to help make the case for engagement are critical.

# 1

## Introduction

In May 2015, the Wellcome Trust held the third annual UK Centres' public engagement workshop, bringing together a network of Directors, Principal Investigators and engagement practitioners in their major UK biomedical science and humanities and social sciences centres. The participants at the workshop included biomedical scientists, historians, artists, directors of research centres and public engagement staff. The group spent three days sharing ideas and good practice about evaluating Public Engagement. Participants explored some emerging evaluation methods that promise to address the complexity of engagement, fostered connections to explore future work, and discussed how to support and strengthen their evaluations.

Simon Chaplin, Director of Culture and Society, Wellcome Trust opened the meeting by encouraging people to explore how public engagement has made a difference, to discuss what has worked well or less well, and find out what practices can be shared across the group.

### Key questions about evaluating Public Engagement

A number of the Directors of the Wellcome Trust UK Centres presented some of their work on public engagement, giving updates on their PE strategies, and highlighting their evaluation challenges. They identified the challenges of measuring the impact of Public Engagement (PE), and framed some key questions for the rest of the workshop.

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How can we do better at measuring our PE work?

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How do you measure what is making a difference?

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What more can we do other than get feedback from the public about an event?

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What more can we do with statistics and analysis of our website?

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How do we keep pace with evolving audiences?

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How do you get feedback from researchers about their feelings towards PE activities?

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If you are doing a broad range of PE activities, how do you get data that tell you what worked well? How do you know when you have a critical mass of activities that are working well?

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Over the last few years, the status of engagement as an integral part of research has become much more accepted. Whether a funder, researcher or participant in public engagement, we all want to believe that such activities have an impact and are worth doing. We want to understand for example, whether people are inspired and enthused, how findings from research inform policies and actions in the real world and whether research addresses questions that really matter to people. However, identifying such impacts and seeking ways to capture evidence of impact are difficult to do. Monitoring and evaluation is especially challenging when working with a diverse range of objectives, audiences and mechanisms.”

*Simon Chaplin, Director of Culture and Society, Wellcome Trust*

# 2

## Challenges of evaluating public engagement

**During the workshop, participants raised some key challenges and difficulties they face when trying to evaluate their PE activities. Here is a summary.**

### **Aims of the engagement**

Understanding what the engagement activities are trying to achieve will help determine the approach to evaluation. Some people felt uncomfortable about a goal of engagement being about changing behaviour. “Are we raising awareness and opening discussions about science or are we trying to change behaviour? We cannot do evaluation without understanding this further.” Others pointed out that there is an assumption that engagement is about conveying information better and engaging the public in dialogue. However this is not the same as experiencing a scientific culture, a social situation or event. Engagement can have a range of aims and intentions, and measuring them implies different methodologies.

### **Purposes of the evaluation**

Deciding why you are evaluating is key but can be difficult. Are you evaluating for self-reflection and learning (also from mistakes) in order to do better? Funders often want concrete ways to recognise their contribution, so are you evaluating in order to demonstrate impact or be accountable? Do you want to have results you can publish and how do you navigate the research environment? For example, what is the relationship between a broad range of public engagement activities and a more narrow instrumental evaluation within the Research Excellence Framework (REF)? How do you measure impact in case studies for the REF, yet also capture the broader concept of public engagement? Often there are multiple aims, with different priorities. Choosing the right kind of evaluation is important. “Some evaluation methods suit activities more than others, and you need to have enough resources.”

### **Cost**

Good evaluation takes time, and so it takes money. “We only have time to do forms on everyone’s chairs and end up doing cheap easy stuff, which is not good.” Some data like numbers of attendees, and whether people enjoyed an event, are easy to collect. Turning everything into metrics is not always appropriate for what you are evaluating. Qualitative methods are time consuming and costly, and must be properly funded.

### **Collecting data and online data**

Participants voiced other concerns about the ability to collect data. “The biggest barrier we face is collecting good quality data. If you can get over the collecting data problem, I think you can put it in any theoretical framework.” Another concern was how do you understand online data? “We don’t know how to expect people to behave when they visit a website, we don’t know what is a good footfall. How should people behave? We don’t know how we should evaluate.” Is it possible to collect data electronically during or after an event? Participants suggested smartphones, and websites where people can enter data online. The Natural History Museum in Oxford has booths with a touch screen, where people can fill in their evaluations.

### **Involving audiences**

Participants discussed finding ways for the audience to support the development of evaluation methods and gathering data. “It is possible to involve your audiences to develop your evaluation mechanisms as well, so that they can feed back into your engagement activities.”

### **Artificial responses**

What do you do if you get artificial responses in feedback? People only say they enjoyed an event because they have been asked about it, but how do you handle this artificiality in your evaluation? People who feel positive about an experience are more likely to fill in a form.

### **Balancing short- and long-term follow up**

Strategies for evaluating one-off events or short-term activities are different in design than an evaluation framework for a range of activities or a longitudinal analysis. “How do you think about the chronology of it, in terms of an investment, and how do you work in a collaborative and iterative way to co-design an evaluation strategy for the future?”

### **Using and sharing learning**

How do you learn from other evaluations about public engagement and build on what works well in practice? Participants felt that there was a wealth of experience and knowledge, that could be shared more widely, yet it was difficult to know how to access this.

## Challenges of evaluating public engagement (cont)

### The researcher experience

Engagement often depends on researchers being supportive and active in the engagement process, but it can be difficult to get their attention and interest. How do you engage reluctant researchers, and how do you manage the transition so that they become enthusiastic champions?

### Ownership of public engagement

It can be hard for researchers and research departments to feel ownership over the public engagement activities, especially when institutional demands to engage do not fit in with researchers' own rationale or research work and place extra demands on their time. How do you ensure that there is a coherent approach to engagement, where researchers feel ownership?

### A. Finding solutions to challenges

Participants chose four of these challenges (the latter four in the summary) to explore further, and tried to identify some possible solutions. This was part of an 'Open Space' session, where participants were free to identify their own topics of discussion and join any group they chose.

### Balancing short- and long-term follow up

Short-term evaluation is easier to do than long-term evaluation, so when you want to look at your activities over a longer period of time how do you go about it? The group agreed that long-term evaluation is important but difficult to do. How do you ensure that what you are evaluating is what you set out to do in the first place? To what extent are we developing a research culture about public engagement? Is there a divide between scientists and social scientists who do research on public engagement? The group considered practical ways to do long-term evaluation, including internal and external databases, longitudinal studies, and retrospective studies.

Some of the solutions suggested for conducting long-term follow-up include:

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Use an iterative process of identifying the data you are retrieving and then readdress the strategy and aims of the evaluation.

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Have practical ideas to keep on track, and make sure you have permission to continue evaluating in ten years' time.

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Conduct a gap analysis to identify what is missing at the start of the work.

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Over the long-term, people tend to look at numbers. So make sure that subjective ideas are also included in evaluations, and perhaps this is best done externally.

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### Using other peoples' evaluation and sharing your own evaluation

How do you learn from other evaluations of public engagement, and how do you share your own work in the area? The group felt that if evaluation reports were shared more widely, they could learn from both methodologies as well as results. This would help them build on what works well, inspire new thinking and ideas but also avoid reinventing the wheel. Many from science backgrounds were unfamiliar with qualitative methodologies and would appreciate guidance on how to select methodologies, and also see examples of this in practice from actual reports. There should be a culture change in attitudes to evaluation, and more integration of the evaluation with the engagement activities. This includes building evaluation into the project earlier, and finding help to design the engagement and evaluation. It links to ideas about the need to develop researchers' skills and training.

Some suggested solutions for sharing experience and lessons learnt include:

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Sharing among Wellcome Trust projects would be good, but this needs curating and tagging to make things searchable.

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Signposting to other bodies of knowledge (NCCPE, British Science Association Collective Memory, Beacons publications and others).

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Use external evaluators to focus the aims of the project and provide support.

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Improve knowledge and capacity around commissioning research and working with consultants.

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### The researcher experience

Having researchers who are both supportive and engaged with public engagement activities, and evaluations, is critical to the process. But sometimes, it is difficult to get the attention and interest of researchers, who feel that 'research' is their job. The group discussed how to manage the transition between unengaged researchers to slightly reluctant volunteers to being enthusiastic champions for public engagement. What messages should we use to encourage researchers? What useful and transferable skills do they have which can support public engagement activities?

Some suggested solutions for engaging researchers include:

Ask researchers who have had positive experiences to communicate this to others.

Match the skills and experience of the researcher with the engagement activity.

Festivals are demanding, so make sure that the stall has enough staff, so people are not worn out by the public.

Collect information from researchers about their experience of participating in a public engagement activity, and do it when you have their attention anyway, such as coffee breaks or in the taxi on the way home. Collect info on the hoof and do not expect researchers to fill in a form afterwards.

Also elicit what researchers have learned about their experiences at longer intervals, such as once a year.

### **Ownership of public engagement and its evaluation**

It can be hard to draw together different strands of public engagement for evaluative purposes and for researchers and research departments to feel ownership over the process. The group discussed the competing demands that exist around public engagement within universities; institutional demands can be different to the choices that researchers or public engagement staff members want to make. Institutions increasingly have definitions of what public engagement is and ideas about what to do, but these are not necessarily shared by all staff and may not be led by the research itself. Researchers that are known for engaging the public can be required to deliver activities for the university that do not fit with their own priorities for public engagement. This is problematic when researchers' time is stretched. Also, how can you evaluate a public engagement activity that you are not leading? What is manageable for public engagement and how do you know it is manageable? The result can be a burden rather than an opportunity.

Some suggested solutions for feeling ownership over public engagement and its evaluation include:

Research groups should develop and articulate their own strategy for public engagement to ensure opportunities are mutually beneficial

If you are a researcher, ask the organisers how they intend to evaluate the activity you are involved in and for access to the results

Have a coherent approach for evaluation across the research centre, drawing projects together.

### *B. Practical top tips from participants*

Embed and plan monitoring and evaluation into the start of the public engagement project.

Think about whether and when to get external people in to support the evaluation.

Think about who will use the evaluation, and what they will use it for.

Consider how you will communicate the findings of the evaluation.

Consider how and when you will act on the learning.

Consider the amount of effort to put in the evaluation depending on what you want to know and the scale of the project. There is a rough ten percent 'guide' for allocating resources and time for evaluation.

Get permission at the beginning of an engagement process to contact people over the longer term, in case you want to do longitudinal studies.

Make the evaluation part of the activity. "We have survey fatigue. With our community science festival, we addressed it by asking the kids to do the surveys. And the kids phrased the questions, and the adults couldn't say no. The only problem was constraining the kids who wanted to do the survey at 10am! We had to tell them to wait until people had actually done things at the festival."

Draw on other sources of information. "You can look at public Facebook pages, and posts about experiences and reactions and the ripple effect. You can do network maps to find out how people are talking to each other and find out what has triggered the biggest reaction and why."

#### *Resource*

Public Engagement: Evaluation Guidelines for Applicants, Wellcome Trust, provides an overview of key questions and issues when planning evaluation of engagement work

[bit.ly/WellcomeEngagementEvaluation](https://bit.ly/WellcomeEngagementEvaluation)

# 3

## What are we trying to achieve with Public Engagement?

This section goes into more detail about the possible aims for public engagement activities. What are we trying to achieve? What changes do we want to see? These two key questions are helpful in thinking about how to measure outcomes or results of public engagement. Participants answered the questions, and expressed their thoughts as results or outcomes or something desirable that happens as a result of public engagement. They wrote their ideas on cards that were stuck on a wall in groups of common themes. The exercise showed the diversity of topics and audiences that people are working with. Desirable outcomes or results included:

### Changes in communities and the public

Empowered communities

The community trusts our research institute

People recognise the quality, importance, and relevance of what we do.

The public value science

We communicate our passion about our work and subject, and inspire others

Children from all background are inspired about science

The public connects physically and digitally with science

The public understands that research is a social and creative activity

Change in public attitudes (stigma)

Increase empathetic awareness of illness.

### Changes in researchers and institutions

Researchers become more skilled and sensitive listeners

Researchers improve their communication skills

Researchers understand diverse perspectives

Researchers develop a more inclusive language for research

Team building in institution takes place

The funder's expectations are met

Accessible expert information relevant to stakeholders is disseminated

Patient care is improved

Meaningful effect and measurement of engagement takes place

Redress of gender imbalance in STEM education takes place

Stereotypes of scientists are broken down.

### Changes in relationships

Critical thinking is stimulated among the public and researchers

The public can engage in informed debate with scientists

Knowledge is exchanged and experiences are shared

New research inputs are generated from the public

Networking takes place between researchers and public (to generate new research)

The public and community informs our public engagement work

The community informs research priorities

Innovative collaborations and relationships take shape



Evaluation approaches are different depending on what you are trying to achieve. A small-scale public engagement activity will require something different to a big programme. But bringing rigour into the evaluation is important if you are trying to demonstrate the value of engagement in your own institution.”

*Chloe Sheppard, Wellcome Trust*

# 4

## Themes in evaluation of public engagement

### **Robin Vincent, facilitator and evaluation consultant, gave an overview of some of the themes and debates in evaluation.**

Some people seem to dread the word ‘evaluation’ and perhaps reasonably so when it is often wrapped in an unhelpful mystique. Evaluation can be perceived to relate to external judgements of success or failure, and also linked to getting funding. It is often done as an afterthought at the end of a project, when there is a need to demonstrate impact to a funder, sometimes in order to get a new grant. All of this does little to harness the potential of evaluation to do many positive things.

Perceptions of evaluation are critical and there is a balance to be found between demonstrating impact (to funders) for accountability purposes and reflecting and learning for future work. Identifying definite impact helps to justify expenditure but the issue of ‘attributing’ your work to a direct positive impact is frequently in tension with a more likely ‘contribution’. Increasingly there is concern to show ‘downwards’ accountability to communities and beneficiaries, which brings a whole other dimension to evaluation. In situations that are complex and dynamic, there is a limit to what traditional evaluation (where indicators are decided in advance) can achieve, especially when projects need to adapt to shifting circumstances.

There is an increasing emphasis on reflecting on practice and learning in order to improve. Informed by theories of education, these evaluation methodologies emphasise action-learning and participatory tools. The emphasis here is on what is seen as important, for whom, by whom and why. But how does this relate to impact? If you, or others, have learnt a lot, so what? Some people say that evaluation can do both; it can help you learn from the experience and demonstrate impact. The buzzwords ‘theory of change’ are enjoying current popularity. If you make clear your ‘theory of change’, you can test it against what actually happened using multiple sets of data and cross-checking or ‘triangulating’ them. It appeals to people who like logical frameworks, and also to people who like context and complexity. In complex social settings, such as those where public engagement activities operate, showing contribution may be more scientific and realistic, than trying to have a causal proof.

The nature of public engagement is dealing with complexity. “Public and community engagement initiatives take place in settings with multiple stakeholders, contextual factors that may have an unforeseen influence, and dynamic circumstances that may lead to unexpected change.” (Engaging with Impact Wellcome Trust report) Finding the appropriate evaluation for the level of engagement activities and their complexity is critical.

### *Formative, process and summative evaluation*

Formative evaluation helps to assess engagement activities at the early stages of development, in order to modify and improve them, often before they are rolled out across a larger project. Process evaluation, focuses on the implementation of a project, and what can be learned about how context and the influence of different stakeholders and practical real world challenges affect the way intended plans play out in practice. Summative evaluation takes place at the end of an engagement activity or programme, in order to help decide whether it has been successful (according to agreed criteria) and what impact it has had. Summative evaluation may inform future efforts, feed into decisions about continuation or adaptation of projects, and it is often expected to demonstrate accountability to funders and those who a project is supposed to benefit.

## Themes in evaluation of engagement (*cont*)

### CASE STUDY

#### Engaging Voice-hearers: Building and evaluating networks in the North-East

Victoria Patton Project coordinator  
Hearing the Voice, Durham University

Hearing the Voice is a large interdisciplinary study of auditory hallucinations, which aims to provide a better understanding of what it is like to hear voices when no one is speaking. Public and community engagement is a key priority for the project; it is not just an add-on or afterthought but serves to deepen and even drive the research. The project has been involved in a rigorous programme of outreach over the last three years, including participation in the Edinburgh International Book Festival, collaborations with voice-hearers on creative projects such as films and literary journals, and participation in local anti-stigma campaigns like the North-East Mental Health Day in Newcastle upon Tyne, which was sponsored by the national Time to Change initiative.

One of the main aims of engagement is to foster genuine knowledge exchange between researchers and members of the voice-hearing community. The team want to learn from people's lived experience in order to enrich their ideas, identify new research priorities and make sure that their work benefits people who hear voices and those who care for and about them. They also want to work with communities to increase public awareness of voice-hearing and reduce the stigma that is often associated with this experience.

Many people who hear voices are members of hearing voices groups nationally and internationally. The Hearing Voices Network (HVN) is the leading peer support and advocacy network for people who hear voices in the UK, and supports over 180 peer support groups across the country. They also wanted to introduce the Hearing the Voice project and its researchers to the local voice-hearing community, share research findings and gain ideas and feedback for future research.

#### Evaluation methods

The researchers worked closely with HVN in order to devise a series of training workshops, networking meetings and interactive research showcases aimed at achieving these goals. While some standard evaluation tools and techniques (including short questionnaires and observation reports) were used, researchers also sought subtle, less intrusive approaches; for example, participants were invited to share reflections on what they gained from the event in an open forum which were then collated by the creative facilitator on a sticky wall. Informal conversations with voice-hearers and their families and carers and other anecdotal evidence also provided important feedback which shaped the structure of future activities.

Gathering and monitoring information from participants revealed that 30 mental health professionals and voice-hearers were trained in the specialist skills necessary to facilitate a hearing voices group, and events contributed to the development of six new local peer support groups. As a result of the HVN networking events, 30-40 people met others, shared ideas and experiences, and found out about local sources of support.

Determining when to evaluate was one of the main challenges. The development of peer support groups and the strengthening of networks can take time to emerge so evaluation is still ongoing. Other questions the research team asked included: How can we measure the quality of our relationships with our stakeholders? What changes have we seen in the way we approach our research as a result? One of the consequences of the programme was the development of a Hearing the Voice reference group – an advisory group of voice-hearers, mental health professionals and service users – work with which has fed into the design of future collaborations and engagement activities, and helped us to identify new issues and questions for research about voice-hearing and other unusual experiences.

#### Lessons learned

- Get to know communities of interest early
- Adjust your evaluation method to suit the event and its audience.
- It is important to build trust, listen and create a safe space where conflicting views can be aired and mutually respected.
- Have an ethics of engagement.

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Our consultations with members of the voice-hearing community shape the questions we ask as researchers as well as the engagement activities and evaluation techniques that we use. A tool that works in one context might not work well in another. We have also learnt of the importance of actively listening to our stakeholders, and developing strong, productive and meaningful relationships that are founded on a deep but critical trust – one that allows genuine dialogue between partners and leaves room for criticism which shapes our research agenda and moves it forward.”

*Victoria Patton, Project Coordinator*

More information about our work with the voice-hearing community and our public engagement activities generally can be found in Working Knowledge [workingknowledgeps.com](http://workingknowledgeps.com) - an online collection of practical resources for anyone thinking of funding or embarking on interdisciplinary research.



# 4

## Themes in evaluation of engagement (cont)

### CASE STUDY

#### Visitor evaluation at Wellcome Collection

Jane Buswell Opinion Leader

Wellcome Trust museums, galleries and cultural spaces all encourage public engagement with science and research. The challenge is how to define public engagement and then evaluate it in an effective way. How can findings be presented to Wellcome Trust so they are useful and can be put into action?

The range of activities for Wellcome Collection such as exhibitions, visitor experiences, events, and varied programmes presents challenges when trying to define and evaluate PE.

What does engagement mean? The team went back to the roots of the word, finding it is multi-faceted, with meanings that have evolved over the years. The use of the word engagement has increased in the past three decades. It has come from French, it has a sense of commitment and pledge, it is active participation and active involvement. In the 80s, 90s and this Century, engagement work has gone up in use.

#### Evaluation methods

The evaluation team talked individually to all Wellcome Collection staff to understand what they saw as engagement and find out what they wanted to do with the results. They tried to understand and observe what engagement might be in the galleries and collections.

The evaluation method involved recruiting 40 visitors who committed to spend half an hour to an hour per day for three days online. They uploaded images that represented the question in words and photos, and created cultural diaries. The researchers avoided explicit reference to engagement, and tried to understand who the visitors were, and what interested them.

#### Key findings:

- Most visitors saw themselves as creative and curious
- Learning was a key expectation with engagement with culture
- Engagement manifests itself in different ways – social or contemplative ways of engagement.



Visitors are constantly engaging outwards, elsewhere and it is easy to forget that while you focus on their experiences inside your building, their engagement is built on their other experiences elsewhere.”

*Jane Buswell, Opinion Leader*





## CASE STUDY

### Evaluating events at Diamond Light Source

Laura Holland Diamond Light Source

Diamond Light Source is a research institute and national facility which hosts a particle accelerator, used by scientists. Public engagement activities started in 2007 soon after the institute opened. The centre has over 6000 visitors each year, and most of the events it runs are large, with 300 people per day for the public and schools days and 100 people per day for girls-only engineering and biology events.

#### Evaluation methods

The institute has a five-year strategy for engagement, which identifies key audiences and defines engagement. Annual plans are devised against this strategy, evaluation plans are written alongside action plan and each year builds on the last, feeding into the development of the next strategy.

The team conducts in-depth and specific evaluation for new events and use different tools for different audiences. For teachers, they use surveys and phonecalls. For pupils they use comment boards and post-it notes. If they repeat events they do not do in-depth questionnaires, but they always collect comments from students to check that what they are doing is still relevant.

The team conducts audits of all the events, compare them to the overall strategy and action plan and make sure they are not swayed by lots of requests from different directions.

When they do not in-depth evaluation, they take video shots of public events, follow tour guides round, and record what they say. They try to collect comments about events without having participants telling them what they think.

They had a recent experience of an event going badly, and were in the difficult position of giving negative feedback to the organisers. In this case, they found that qualitative methods were better than quantitative, as participants' own comments are indisputable.

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We would like to do longitudinal evaluation to show the interconnectivity between our programmes and map routes though different parts of the programme over a significant period of time.”

Laura Holland, Diamond Light Source

# 4

## Themes in evaluation of engagement (cont)

### Example of a logical framework for an International Public Engagement project

The following extracts from a logical framework are a useful illustration of some of the range of types of outcomes and indicators used in some international engagement work (but are not meant to be prescriptive or exemplary).

‘Beyond the Hospital’ is a Public Engagement Project developed by Oxford University Clinical Research Unit (OUCRU) in Vietnam to increase dialogue between patients with central nervous system infections (CNSIs), carers, health workers and partners. The aim of the project is to facilitate access to neurorehabilitation resources, raise

public awareness, and improve health outcomes in Vietnam. The project used participatory photography, science café discussions, development of a care package and related training, and consultation with a wide range of stakeholders, including through an advisory board.

The table below summarises the overall desired outcomes for the Beyond the Hospital project and a selection of indicators and key sources of data for each outcome (the full log-frame includes more specific measurable indicators and sources of data in detail for each outcome).

| Desired Outcomes  | Indicators/sources of data  |
|---|---|
| 1 / Policy makers are better informed about rehabilitation challenges for CNSI patients.  | 1 / Difference between channels for sharing PE project findings pre- and post-project<br>2 / Government (MOLISA, MOH, T4G) involvement in advisory group & attendance at photo exhibition & comments  |
| 2 / Hospital for Tropical Diseases (HTD) management has integrated care package/discharge planning into SOPs.                       | 1 / HTD take on printing & dissemination of care pack (sustainability)<br>2 / Feedback from HTD on care pack  |
| 3 / Links between HTD and other rehabilitation organisations are strengthened.  | 1 / Establishment of advisory group<br>2 / Evidence of ongoing support between HTD & relevant groups  |
| 4 / OUCRU study teams have integrated rehabilitation indicators into future clinical trials.  | 1 / Discussion with OUCRU staff<br>2 / Evidence of indicators in trial protocols  |
| 5 / Preventable infections and pressure sores among CNSI patients following discharge are reduced and independent living increases. | 1 / Baseline data from HTD of existence of preventable infections among CNSI patients upon discharge from HTD & upon readmission<br>2 / Information from interviews concerning symptoms upon discharge & 6 months after discharge<br>3 / Follow up survey 2- 6 months after patients have received care package |
| 6 / Patients/carers feel better supported to return to the community.   | 1 / Assessment of satisfaction with care package & support from HCWs (from interviews & focus groups pre- and post-care package & forum theatre)<br>2 / Interview with patients before and after care package is used to assess increased awareness of rehab options & services                                 |
| 7 / Health Care workers have increased understanding and capacity to support patients on discharge.                                 | 1 / Interviews with HCWs pre- and post-care package/training/capacity building exercises<br>2 / Service mapping pre- and post-care package  |
| 8 / Public have increased awareness of rehabilitation challenges and coping strategies.   | 1 / Science café discussion with HTD doctors from other units after photo exhibition<br>2 / Assessment of medical students’ knowledge on the topic before & after photo exhibition<br>3 / Media coverage of photo exhibition, number of stories in media regarding rehabilitation challenges                    |
| 9 / BTH study team has increased capacity to conduct public engagement.   | 1 / Measuring awareness & uptake of participatory photo projects, forum theatre, evaluation and project management tools (e.g. Log Frame etc)<br>2 / Assessing quality of methodologies including consent (self & others)   |

# 5

## Innovative approaches to evaluation

Robin Vincent presented some innovative approaches to evaluation, including Realist Evaluation, Outcome Mapping and Most Significant Change methodology. These draw on evaluation support and resources developed for the Wellcome Trust Major Overseas Programmes, responding to their need to address complex multi-stakeholder relationships in many engagement initiatives. Having a rigorous theoretical basis for an evaluation can help legitimise public engagement in scientific institutions and the session provided an introduction into emerging methods. It complemented participants' familiarity with more traditional methods for evaluating events and short-term projects with easily defined outcomes, already discussed at previous workshops.



There are certain ideas which 'count' as valid scientific methodology for some audiences, so you have to ask who the evaluation is for, and who needs to take it seriously. In the complex and social settings that are common for public engagement efforts, showing the contribution of a project may be more realistic and 'scientific' than expecting definitive attribution."

*Robin Vincent, Facilitator*

### Realist Evaluation

Realist Evaluation is an emerging methodology, which explicitly addresses complexity in social interventions and processes, relevant for public engagement. It integrates qualitative and quantitative methods and data and seeks a 'science' of evaluation and rigour. It has an emphasis on 'learning'. It is avowedly multi-method, drawing on quantitative, qualitative, comparative and narrative evidence, as well as grey literature and the insights of programme staff. The range of data and evidence gathered are then used to 'test' the theory or theories of change under consideration and how well they explain the pattern of outcomes. There is a helpful 'division of expertise' in different informants and their knowledge of the programme, while the evaluator and data act as 'adjudicator'.

### Realist Evaluation: understanding what works, for who, in what circumstances.

As an emerging method, Realist Evaluation has a growing influence in a range of fields, such as within UK Public Health policy and the work of the National Institute for Clinical Medicine. In addition it is influencing some of the work of the UK 'What Works Centre' on crime reduction. It is also being taken up in international health work by organisations such as the International Red Cross. Many engagement initiatives are yet to try out Realist Evaluation, but feel it has great potential to address the way that participants may respond differently to engagement efforts, in different contexts.

### A hypothetical example helps to illustrate this potential:

A schools engagement project aims to give students an experience of meeting a working scientist and visiting their lab, as well as having the opportunity to ask questions of them on-line. The project leaders are interested in whether this experience affects students' understanding of scientific research and their commitment to pursuing a science curriculum in future.

A Realist Evaluation approach seeks to first clarify the 'theory of change' behind the intervention: how the project is expected to work. How will the project enhance understanding and contribute to greater interest or commitment to science subjects? This 'theory of change' is drawn from the project's intentional design documents and secondary literature about how such interventions are understood to work. It is also important to gather the insights of project managers, implementers and participants, and bring all these perspectives together.

Such an exercise may suggest that the project will work best when already interested students get a more tangible sense of what scientific work is in practice, meet a committed scientist, and get to understand how the research process can translate into very worthwhile practical results.

Evaluation data will then be gathered to 'test' this theory and see how it stands up to the empirical evidence. In addition to looking at the outcomes of the intervention - in terms of numbers of students following a scientific curriculum, and improved levels of understanding of research - the evaluation will employ qualitative methods to understand the experiences of different stakeholders involved in the initiatives in different places.

# 5

## Innovative approaches to evaluation (cont)

Across a number of different schools where this intervention takes place, outcome data may show that in some schools the initiative leads to a greater number of students pursuing a science curriculum while in others schools, the initiative does not seem to lead to any increase. Importantly, the evaluation will also attend to some of the contextual factors which may be influencing this pattern of outcomes: for example in schools where student attendance and motivation is high, the initiative may work in the way envisaged, while in schools where aspirations are low, and attendance is compromised by a range of socio-economic challenges, the initiative may not have a purchase. In still other schools with a strong religious ethos that is explicitly in conflict with a scientific outlook, the initiative may also be less effective (while in other religious schools that embrace a scientific outlook, the results may differ).

By gathering the data to 'test' the theory of change, and to see how it accounts for the pattern of outcomes observed, the evaluation leads to a clearer more nuanced idea of what are the 'active ingredients' making the intervention work, and who are the likely winners and losers in different contexts.

### **Example in practice: Using Realist Evaluation to learn about disability inclusion in Cambodia**

Realist Evaluation was used to understand how encouraging networking between disability and mainstream development organisations in the Cambodian Initiative for Disability Inclusions (CIDI) could improve the national response to disability in a programme supported by the Australian Red Cross. In addition to networking, a programme of capacity development for organisations was also put in place. Programme documentation was vague on how networking between organisations was meant to improve the effectiveness of the national response to disability. This was also the case with capacity development, which took a range of forms from financial training to strengthening monitoring and evaluation (M&E) skills.

The evaluation sought to clarify the 'theory of change' behind how networking and capacity development were supposed to improve the effectiveness of organisations working for disability inclusion. Review of existing literature, project documents, and key informant interviews helped to clarify everyone's expectations as to how networking and capacity development were likely to make a difference. Data were then gathered to either support or challenge these assumptions about how change happens. Participatory reflection exercises, key information interviews, short surveys and reviews of project documentation were used to draw out concrete examples of change that could be linked to project initiatives.

A range of mechanisms were identified which contributed to the success of the programme, and these were made explicit and illustrated, rather than left implicit. Such mechanisms included active support and promotion of sharing of learning in regular face-to-face and electronic forums, and resources for exchange visits and peer support. The consistent use of participatory methods encouraged and valued the contribution of a range of different organisations, built trust, and fostered dialogue and learning among them so that innovations could spread, and collaborations and new partnerships could emerge. Participatory learning exercises also ensured that training responded to real challenges in organisations' work, and tailored, detailed and frank feedback given in an established relationship led to real learning. Organisations were encouraged to draw on the expertise and skills of other organisations in the network, and this built relationships and strengthened capacity both at the same time.

For more information see: A Learning focused evaluation of the Cambodia Initiative for Disability Inclusion (CIDI) implemented by the Australian Red Cross, Robin Vincent 2013  
[bit.ly/RedCrossCIDI](http://bit.ly/RedCrossCIDI)

Resources on Realist Evaluation:  
[bit.ly/WellcomeRealistEvaluation](http://bit.ly/WellcomeRealistEvaluation)

### **Outcome Mapping**

Outcome Mapping (OM) is a participatory monitoring and evaluation approach that sees projects' outcomes as changes in the behaviour and activities of partners that the project directly influences. These partners are known as 'boundary partners' and are those individuals, groups and organisations the project interacts with directly and who they can hope to influence. Stakeholders and partners define the changes expected from a project, and there is recognition of the many factors outside the control of the project. Therefore, people seek to understand the contribution made by a project not claim definitive attribution for changes.

The process is that organisations and stakeholders agree the kind of changes they would like to bring about in boundary partners (for example, a local community expresses independent perspectives on proposed health research). They decide the strategies to support these changes (such as an effective community advisory board), and design a monitoring system to track changes ('progress markers' of change such as levels of functioning of CAB/ influence on research protocols). They then design an evaluation plan with a focus on use of data gathered, for learning and adaptation.

### **Outcome Mapping:**

#### **Identifying changes in the groups you are engaging with**

Outcome Mapping is being used in the international development context, to understand project 'outcomes' as changes in the attitudes and practice of people and organisations that are directly influenced by the project. Outcome Mapping has not yet been applied for learning and evaluation in public engagement settings, but a hypothetical example can illustrate its potential.

A research programme into an emerging health condition seeks to share the latest biomedical science on the condition, and explore the experiences and awareness among people affected by the health condition. This is to influence the development of policy around the health condition, and to inform the activities of organisations and charities that work on the condition.

Using Outcome Mapping, evaluation focuses on the changes brought about by the project with the various different groups that the project directly influences. Working with representatives from each of the groups in the planning stage, the project identifies realistic and meaningful changes within the scope of the project, that make sense to each of the groups.

In the case of people affected by the health condition, it aims to track whether a trusting relationship and two-way dialogue between the project and those people has been established, as well as explore the impact of the exchanges of knowledge and information both ways. In the case of policy-makers, the project wants to track changes in awareness and use of the scientific information that the project is disseminating, in framing debate but also informing policy over the longer term. In the case of organisations working on the health condition, the project wants to assess whether a two-way flow of information has been established, and whether the funding priorities of these organisations has been shaped by an awareness of the latest science, and an appreciation of the experiences of people affected by the health condition.

The project uses a range of data to gauge whether the hoped for changes are realised in practice, including a review of published documentation of partners and key informant interviews. It also includes 'outcome journals' gathered by the partners it is hoping to influence, which track detailed and concrete examples of these changes, stretching from simple results expected, to more far reaching changes that are hoped for.

In this way, the project can evaluate whether it has brought about changes in the range of key groups it has identified for influence, but also learn about where its activities are meeting or falling short of their intended aims, for improvement in future.

#### **Example in practice:**

#### **Using Outcome Mapping to look at sustainable agriculture in Kenya**

Outcome Mapping was used in Kenya in a project to improve crop yields by identifying appropriate and ecologically sound agronomic practices for use on small family farms. Knowing that pests and other challenges to production can evolve gradually or emerge suddenly, the research focused on building collegial, enduring relationships with farmers, so they could work together to identify and solve current and future problems, rather than focus only on particular agricultural practices decided in advance. The researchers wanted farmers to consider themselves as partners in identifying problems. While the ultimate goal was sustainable improvements in crops, the project saw involvement of farmers as a key outcome, as well as their ability to apply research findings to address factors affecting crop yields in the future. Using Outcome Mapping the project tracked changes in farmer behaviour before, during and after the project, as the key result to be evaluated. They needed to collect data on farmers as the key 'boundary partners' of the project, in order to assess project performance and identify improvements. In this way, it was the changes in behaviour of the farmers, as an important contribution to the longer-term goal of sustainable agriculture, which was the focus of the evaluation.

For more information see: Outcome Mapping: A method for tracking behavioural changes in development programmes, Terry Smutylo (no date),

[bit.ly/Smutylo](http://bit.ly/Smutylo)

Resources on Outcome Mapping:

[bit.ly/WellcomeOutcomeMapping](http://bit.ly/WellcomeOutcomeMapping)

## Innovative approaches to evaluation (cont)

### Most Significant Change methodology

'Most Significant Change' is a qualitative and participatory monitoring and evaluation approach that uses stories of change to assess the impact of projects and programmes. It has been called a means of 'monitoring without indicators' because it does not make use of fixed indicators decided at the outset of a project. Instead, stories from the field level are gathered from a range of stakeholders on common 'domains' of change (for example 'community empowerment'), along with details of context, and accounts of 'why' the changes described in the stories are important. The stories are then systematically compared and analysed through multi-stakeholder discussion. In this way, the approach collects accounts of the changes brought about by a project and helps to clarify which changes are really important, to get to the heart of what the project is trying to achieve. The process also helps clarify the values and priorities underpinning interventions, and can promote learning and better communication within organisations and across stakeholders.

For more information see:

[bit.ly/MostSignificantChange](http://bit.ly/MostSignificantChange)

Resources on MSC:

[bit.ly/WellcomeMSC](http://bit.ly/WellcomeMSC)

### *Thoughts from the participants about innovative methodologies:*

**"This is a welcome emphasis, and much more humanities friendly. It's about understanding complexity."**

**"I like the idea of boundary partners, as you can realistically narrow it down to who you actually work with, rather than thinking about how our messages are going to get out there to a homogenized mass."**

**"It is reassuringly unambitious. You are not trying to change the world, but you are building a new relationship, we want this relationship to exist and that is a start."**

**"Agreeing the outcomes with the people you are working with is really important, rather than deciding what you want from your office and the outcome before you have even started."**

**"One size doesn't fit all. I feel strongly that we should make evaluation really enjoyable for people, and it should be part of the engagement process itself."**

**"We used MSC methodology as a planning tool as well as an evaluation tool and it works well for countering assumptions about the project you are planning. You say, if this project took place, what can you imagine would be the outcome?"**

### CASE STUDY

#### A new approach to evaluating art and engagement in an NHS setting The Barometer of My Heart

Prof Lynn Froggett Psychosocial Research Unit (PRU),  
University of Central Lancashire (UCLAN)

Anna Ledgard Producer

Mark Storor Lead artist of The Barometer of My Heart in association with Artsadmin in collaboration with Dr Leighton Seal consultant in endocrinology at St George's Hospital, Tooting; Sir Ludwig Guttman Health & Wellbeing Centre; and FACT, Liverpool.

The Barometer of My Heart is a four-year project led by artist Mark Storor which has involved creative workshops with men in military, sports and corporate settings, and research with men attending erectile dysfunction clinics. Inspired by conversations with these men, the project will culminate in public performances of The Barometer of My Heart in Autumn 2015. Made in collaboration with an international company of artists and participants, The Barometer of My Heart will explore the rich diversity of male experience. Carnavalesque, primitive and tender still and moving image, music and animation, live performance and sound combine to create an intimate reimagining of masculinity today.

#### Evaluation methods

The project is using an evaluation method called the 'Visual Matrix' that is led by imagery and visualisation and can yield depth understanding of highly-sensitive material where experience is often unspoken or unspeakable. It will be used primarily with members of the public to achieve a subtle understanding of how they engage with the finished work; it will also be used with the artistic team in order to better articulate their artistic process as they transform the primary material collected by Storor from the consultations and other encounters related to this subject.

#### Key features of the process include the following:

- Participants engage aesthetically, emotionally, and imaginatively with the art in a group-based setting, using associative thinking rather than discussion.
- A facilitator ensures that the process is led by imagery, visualisation and affect and produces an emergent 'collage' of further images and ideas.
- Subjective responses to the material are voiced in a group setting, are culturally embedded and contribute to a shared outcome.
- Personal and social aspects of engagement are intertwined.



# 5

## Innovative approaches to evaluation (*cont*)

### CASE STUDY

#### A new approach to evaluating art and engagement in an NHS setting (*cont*)

##### The Visual Matrix is a four-stage process:

- 1 / Stimulus material or direct experience of the artwork itself
- 2 / Visual Matrix; a facilitated associative group process led by imagery/affect
- 3 / Post-matrix participant-led discussion and image mapping
- 4 / Research panel interpretation.

##### The evaluation questions were:

- What has the artwork presented about men's health and wellbeing in general and erectile dysfunction specifically as a biomedical and psychosocial condition?
- How did the artwork affect participants? From the visual matrix with the actors, how did the artistic process lead to this outcome?
- Why do the participants respond as they do? What does this tell us of the relationship between the artwork and the social context in which it is produced?



Evaluation for me is absolutely central to our process in everything we do. We have to be able to account for ourselves in ways which are understood within the context of the NHS. The collaboration with Lynn Froggett offers an opportunity to pioneer a theoretically grounded method of evaluation which is sensitive to emergent arts processes.”

*Anna Ledgard, Producer*

Final performance:

[bit.ly/MarkStororBarometer](http://bit.ly/MarkStororBarometer)





## Innovative approaches to evaluation (*cont*)

### CASE STUDY

#### Complementary use of mixed methods in Community engagement: experiences from Coastal Kenya

Dorcas Kamuya The Ethox Centre, Oxford University, and based at the KEMRI Wellcome Trust research Programme (KWTRP) in Kenya.

A mixed methods approach can work complementarily and provide a fuller picture; it may be most appropriate for evaluation of complex interventions, such as community engagement.

Kenya Medical Research Institute (KEMRI)-Wellcome Trust Research Programme (KWTRP) is a large multi-disciplinary international collaborative health research programme, established since 1989 (25 years ago). It is primarily based in Kilifi County Hospital on the Kenyan coast, with a second unit in Nairobi. An active Kilifi Health Demographic Surveillance System (KHDSS) covers about 270,000 residents living in and around the Kilifi County Hospital, and are the community that we often refer to with regards to community engagement. With a current work force of nearly 800 staff, of whom a third are frontline research staff, the Centre has an international reputation in research on major disease burdens for populations in developing countries. Field workers are a key group of staff who interface between the research programme and the community. Their roles are to undertake consent processes, conduct 'informal' community engagement, follow-up with participants and carry out simple non-invasive study procedures.

KWTRP has always had some form of community engagement since its inception. In 2005, informed by studies that showed low understanding of research and of programmes' activities among the community, and with dedicated funding for community/public engagement from the Wellcome Trust, we developed a comprehensive communication strategy. Supported by an External Advisory Group consisting of experts in policy, ethics and communication, the communication strategy was developed with three main goals:

- to build mutual understanding and partnerships with the community, including appropriate levels of trust
- to make sure that the research is ethically conducted
- to ensure programme sustainability.

A dedicated Community Liaison Group (CLG) was established to implement the strategy. A whole range of activities have since been implemented, consisting of programme-wide engagement to share and consult about the work of the research centre, and study-specific engagement aimed at supporting studies with their community engagement activities. All these activities are coordinated by the Community Liaison Group, with advice and support from social science researchers based at the programme.

#### Evaluation methods

The community engagement strategy was set up as an action research, with ongoing monitoring which feeds into how the strategy is implemented. Right from the beginning, an evaluation plan was formulated which would use multiple methods including:

- Pre- and post-intervention household surveys (in 2005 and 2010), which used a structured questionnaire with some open questions. A coding scheme was developed for the open question responses.
- A series of case studies which each used different methods including observations, exit interviews and surveys.
- Periodic reflection sessions with the social scientists and the Community Liaison Group about the ongoing community engagement work.
- Observations on engagement activities and interviews with scientific staff and CLG members - by social scientists who are relatively independent of the CLG team.

The evaluation methodology is drawn from and feeds into KWTRP's conceptual framework for the community engagement programme and their theory of change. The framework recognises the broader context in which community engagement takes place. The context takes into account several factors that might influence community engagement including the nature of the institution, the policies, the type of studies that communities are involved in, and the kind of participants recruited into studies. A crosscutting area in all the community engagement activities, of interest in the evaluation, is the nature of relationships between the research centre and the community, and how it changes over time. There are a number of ways, both qualitative and quantitative, that we capture information to inform us about the nature of relations, including 'Lickert scale' questions about trust, and exposure to KWTRP activities.

Based on the evaluation of our community engagement activities so far, we have learnt a number of lessons:

- Evaluation needs to take into account that community engagement activities are often complex social interventions.
- Having a mixed methods approach is a strength, because it helps explore similarities and differences between qualitative and quantitative data and across different respondents.
- Critical friends and outsider perspectives are useful in supporting the evaluation work.

“

It is important for our CE work, that we had goals that we thought were clear, that we had activities designed to respond to those goals, that we had an idea of who the communities are and we considered carefully the context in which this work was being done. Having an evaluation plan right from the beginning was helpful for us. We also recognised that it is important to document both positive and negative, and intended and unintended outcomes.”

*Dorcas Kamuya, KWTRP*



# 6

## Using evaluation findings

Focusing on how the monitoring findings will be used is very helpful for planning an evaluation. Participants at the workshop filled in a table (Annex one) to encourage them to think about the following questions:

Who are the intended users of the evaluation?

Are there multiple users? (You, project management team, institution, funders, partner organisations, other academics etc.)

What are they going to use it for?

To learn how to improve practices, to be accountable to funders, to help partners learn about their work, or something else?

When do you need the findings?

These types of questions help identify the data you might need and the methodology you might choose; there are lots of strategic choices to make.

### *Participants' thoughts on the exercise:*

"It was really hard to disentangle who the users are and how we use our findings in different ways. It was very illuminating and more difficult than I thought."

"If you use this properly, you can have a dialogue with your intended users."

"The table lays out possibilities but you are going to make pragmatic choices and it helps you think about what you want to focus on."

"It made me realise I needed to focus more on the community partners, and find ways to work better together, and to focus more on the audience and what we want to deliver to them."

### **Learning from mistakes**

One discussion during the workshop focused on making mistakes and learning from them. However, it can be hard to discuss negative aspects of a project. One participant said, "I run a forum and tried to have a session about things that went wrong, and I couldn't get anyone to say anything. It's really hard to talk about negative findings. It is seen as a failure to have negative findings but we have to learn about things, rather than see evaluation as binary: did it work, did it not work? Other participants agreed that they have learnt just as much from hearing about failed projects as they have from successful ones. Another person shared an experience from their team where they have a 'what's hot and what's not' session, and share what they thought worked well and what didn't work so well.

Others argued for the role of the critical friend, and invited external evaluators to an event to take part, as if in a 'mystery shopper' role. This was the most informative thing that they did as part of their evaluation.

### *Participants' thoughts on learning from mistakes:*

"The more we acknowledge our failings the better."

"Most failures are not abject failures, not entire failures, and that is why the realist evaluations appeals because it is about what works in one context, and maybe not in another."

"It is hard to deal with failures if you expose individuals to criticism. You need to be careful to analyse the failure in an institutional and systemic manner, rather than focusing on people."

"If you don't say things honestly about what doesn't work, then you cannot hope for change. "

"We have a responsibility to tell the truth about what has happened, because it is about doing public engagement effectively and unless you learn you cannot do this."

# 7

## Strengthening learning and evaluation of public engagement

Participants discussed what kind of support they need to strengthen their public engagement work and their evaluation. The main areas can be summarised as:

Peer support, sharing learning and belonging to a community of practice including:

sharing public engagement strategies and monitoring and evaluation strategies with each other

sharing experiences and lessons learnt

a 'buddy' programme with agreements to visit each other's public engagement event and help evaluate it

exchange programmes for researchers and public engagement practitioners to visit each others' sites

a one-day peer support evaluation workshop with groups each having access to an evaluation expert

a regional 'get-together' of interested people.



**Being a community is good. I don't want it to all go away and then we meet up this time next year."**

Access to resources including:

a web-based shared platform for resources (Ning or FaceBook?)

a repository of tools, or a toolkit, with advice about which contexts different methods work in, and which size of programmes they best suit.

case studies about how the evaluation process had an impact on the programme, not just what methods were used

Wellcome Trust to share evaluations of their centres and what they are doing

Access to external consultants who are experts on M&E further training on public engagement and evaluation, and the skills to use different methods

Broader cultural change in institutions including:

a better understanding of the constraints and pressures of doing public engagement as a researcher, including a system of reward and recognition within the professional scheme

evidence available to help make the case for engagement at an institutional level.

# 8

## Summary

Evaluating public engagement can seem like a daunting prospect, when faced with the complexity of relationships and potential outcomes that different engagement activities may produce. Doing public engagement itself can sometimes be enough of a challenge, and evaluating it can feel like an additional layer, which costs time, money and resources that are often limited. However, asking some simple questions about the purpose of the engagement and what the evaluation is trying to achieve can be a useful starting point. Thinking about evaluation at the start of a public engagement project can actually help inform the direction of the project itself. It can also help in general to think about who the evaluation findings are for and how they will be used by different audiences.

Evaluation approaches can be traditional and simple, especially if you are evaluating one-off or short-term activities. If you wish to evaluate more complex engagement activities - which can be a range of different activities with a variety of partners, or activities over the longer term - then it might be worth considering some more innovative approaches to evaluation. It might also be worth finding ways to bring in external support for evaluation at the start of a project, and join a community of practice with like-minded engagement experts who are keen to share experiences and lessons learnt about evaluation.

There is no one 'right' way to evaluate public engagement; but it is important to consider why you are doing the engagement in the first place, what the changes are that you want to see take place and how will you achieve them (a theory of change). Identifying desirable outcomes at an early stage is important, although these may well change over the course of a project. It is also important to understand the purpose of the evaluation; whether it will help with reflection and learning about public engagement for your own project and to share with others more widely; or perhaps it is to demonstrate identifiable impact that your own project has had, in order to meet funder requirements or show accountability.

In all cases, building a body of evidence that supports public engagement as a worthwhile activity is important and something that we can do collectively. Collaborating with other research centres, sharing knowledge, expertise and experience is critical and will support the overall aim of promoting public engagement with science and research.

### 1. National Coordinating Centre for Public Engagement evaluation resources:

[bit.ly/NationalCentrePE](http://bit.ly/NationalCentrePE)

Sections on evaluating:

Public Engagement activities

community engagement and participation

arts projects

engagement with children and young people

social impact

Developing an evaluation plan:

[bit.ly/PEEvaluation](http://bit.ly/PEEvaluation)

The business case for public engagement: outlines the strong case to be made for the wider benefits of public engagement and how this can be turned into a compelling business case

[bit.ly/PEBusinessCase](http://bit.ly/PEBusinessCase)

### 2. Introductory resources to evaluation methods for Public and Community Engagement (developed for Wellcome Trust Major Overseas Programmes by Robin Vincent):

[e-mops.ning.com/page/resources](http://e-mops.ning.com/page/resources)

Includes:

**Guides to evaluation of public engagement:** Annotated list and links to a number of UK focused guides to evaluating public engagement focusing on evaluation of events and research dissemination rather than longer-term community engagement, with clear introductions to monitoring and evaluation and some useful approaches, tools and templates.

**Evaluation of community engagement:** An annotated list of guides and toolkits useful for evaluation of community capacity and engagement (if not specifically on engagement with research)

**Realist Evaluation:** Annotated list of resources for this method, which is useful for evaluation of complex social programmes, implemented across a variety of contexts.

**Outcome Mapping:** Annotated list of resources for this planning, monitoring and evaluation approach that is particularly helpful for evaluating multi-stakeholder projects.

**Most Significant Change:** Annotated list of resources for this qualitative and participatory monitoring and evaluation approach that gathers stories of change from a range of stakeholders, which are then discussed and analysed together to assess the impact of projects.

**Case studies for evaluation:** Annotated resources list for this often misunderstood method, which can be a valuable and rigorous way to answer 'how' and 'why' questions, and understand projects in their real-life contexts.

### 3. Other useful guides and introductions

**Evaluation Practical Guidelines: A guide for evaluating public engagement activities (Research Councils UK):** Accessible and clear (49 pages) guide to evaluation of public engagement activities with a focus on events and exhibitions and researcher dissemination, rather than longer-term community engagement. Gives a concise clear introduction to the basics of evaluation and developing an evaluation plan from initial objectives. Includes some guidance on designing questionnaires and doing focus groups and interviews with some good links to resources

[bit.ly/RCUKEvaluation](http://bit.ly/RCUKEvaluation)

**Royal Academy Ingenious evaluation toolkit:** developed by the Royal Academy of Engineering to support evaluation of the public engagement capacity and activities of engineers.

[bit.ly/djUPUC](http://bit.ly/djUPUC)

Includes a short accessible guide (22 pages) to the basics of evaluation, including a simple explanation of evaluation approaches and data analysis. Although this is designed for those evaluating engagement projects in engineering it is a very clear introduction to key aspects of planning an evaluation:

[bit.ly/RAEngIngeniousGuide](http://bit.ly/RAEngIngeniousGuide)

**Guide to successfully evaluating science engagement events** (Ben Gammon and Alex Burch):

[bit.ly/WellcomeSciEventEval](http://bit.ly/WellcomeSciEventEval)

**4. Research Councils UK Public Engagement Impact case studies:** a series of case studies which look at both research communication and two-way engagement and dialogue with the public to inform their research, as well as the potential of citizen science and active involvement in the research process:

[bit.ly/RCUKPEImpact](http://bit.ly/RCUKPEImpact)

**5. 'What's in it for me?' The benefits of public engagement for researchers**

Includes highlights of first hand experiences of a range of researchers across the UK of positive benefits arising from engaging with the public

[bit.ly/RCUKInItForMe](http://bit.ly/RCUKInItForMe)

### Acknowledgements

Thank you to all the participants for great commitment and energy during the workshop, and for such engaging discussions, which are evident throughout this report. Rich exchange of experience and learning took place, and by the end of the workshop it was clear that many participants felt a sense of belonging to a community of practice in UK public engagement.

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## Participants

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**Dr Maria Adams**  
University of Cambridge Metabolic  
Research Laboratories

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**Professor Jonathan Barry**  
Centre for Medical History,  
University of Exeter

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**Mrs Isabelle Boscaro-Clarke**  
Diamond Light Source

---

**Ms Nicola Buckley**  
University of Cambridge

---

**Dr Karen Bultitude**  
University College London

---

**Dr Lyndsey Butterworth**  
Wellcome Trust Centre for  
Mitochondrial Research,  
University of Newcastle

---

**Ms Hannah Camm**  
The Francis Crick Institute

---

**Dr Simon Chaplin**  
Wellcome Trust

---

**Ms Lyndsey Clark**

---

**Dr Vickie Curtis**  
Wellcome Trust Centre for  
Molecular Parasitology,  
University of Glasgow

---

**Miss Melanie Davies**  
The Francis Crick Institute

---

**Mrs Dee Davison**  
Beltane Public Engagement Network

---

**Dr Clare Davy**  
The Francis Crick Institute

---

**Dr Thomas Dixon**  
Queen Mary Centre for the  
History of the Emotions

---

**Dr Helene Doerflinger**  
Gurdon Institute, University  
of Cambridge

---

**Ms Maria Fanourgiaki**  
Wellcome Trust Centre for Cell  
Biology, University of Edinburgh

---

**Professor Charles Fernyhough**  
Durham University

---

**Ms Georgina Ferry**  
Wellcome Trust Centre for Human  
Genetics, University of Oxford

---

**Miss Kimberley Freeman**  
University College London

---

**Professor Lynn Froggett**  
University of Central Lancashire

---

**Professor Fiona Gribble**  
University of Cambridge

---

**Dr Ali Haggett**  
Centre for Medical History,  
University of Exeter

---

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University of Warwick

---

**Ms Laura Holland**  
Diamond Light Source

---

**Ms Sheilagh Holmes**  
University of Warwick

---

**Dr Sarah Hussain**  
Centre for Gene Regulation and  
Expression, University of Dundee

---

**Professor Mark Jackson**  
Centre for Medical History,  
University of Exeter

---

**Ms Sarah Keer-Keer**  
Wellcome Trust Centre for Cell  
Biology, University of Edinburgh

---

**Mrs Claire Keyte**  
Centre for Medical History,  
University of Exeter

---

**Professor Cay Kiely**  
Wellcome Trust Centre for  
Cell Matrix Research,  
University of Manchester

---

**Ms Anna Ledgard**  
Artsadmin

---

**Mr Brian Mackenwells**  
Wellcome Trust Centre for Human  
Genetics, University of Oxford

---

**Mrs Alexis Mannion**  
The Francis Crick Institute

---

**Professor Hilary Marland**  
University of Warwick

---

**Ms Katie Matthews**  
The Francis Crick Institute

---

**Dr Martin Moore**  
Centre for Medical History,  
University of Exeter

---

**Ms Pauline Mullin**  
MRC

---

**Dr Julie Murphy**  
Wellcome Trust Centre for  
Mitochondrial Research,  
University of Newcastle

---

**Dr Victoria Patton**  
Durham University

---

**Professor Cathy Price**  
Wellcome Trust Centre for  
Neuroimaging, University  
College London

---

**Ms Philippa Russell**  
Wellcome Trust - Medical Research  
Council Stem Cell Institute,  
University of Cambridge

---

**Dr Robb Rutledge**  
Wellcome Trust Centre for  
Neuroimaging, University  
College London

---

**Ms Chloe Sheppard**  
Wellcome Trust

---

**Professor Austin Smith**  
Wellcome Trust-Medical Research  
Council Stem Cell Institute,  
University of Cambridge

---

**Dr Emma Sutton**  
Queen Mary Centre for the  
History of the Emotions

---

**Dr Matthew Thompson**  
University of Warwick

---

**Professor David Tollervey**  
Wellcome Trust Centre for Cell  
Biology, University of Edinburgh

---

**Professor Doug Turnbull**  
Wellcome Trust Centre for  
Mitochondrial Research,  
Newcastle University

---

**Dr Robin Vincent** Facilitator  
Independent consultant

---

**Professor Andy Waters**  
Wellcome Trust Centre for  
Molecular Parasitology,  
University of Glasgow

---

**Dr Angela Woods**  
Durham University

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**Mr Alan Yabsley**  
Queen Mary University of London

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Wellcome Trust  
Gibbs Building  
215 Euston Road  
London NW1 2BE, UK  
**T** +44 (0)20 7611 8888  
**E** [researchers.pe@wellcome.ac.uk](mailto:researchers.pe@wellcome.ac.uk)  
**wellcome.ac.uk**