Peer-Led Evaluation Toolkit

A step by step guide to peer-led evaluation for community organizations



Welcome! We're so glad you decided to pick up this toolkit.

This is a step by step guide designed to help community organizations furthering the work of the Strategy for Community Mental Health to build their confidence using peer-led evaluation. It is meant to be an interactive experience and contains reflection questions as well as activities to complete.

The toolkit contains the following parts:

1. Introduction to Peer-Led Evaluation
2. Identifying Outcomes & Indicators
3. Data Gathering Tools and Methods
4. Analysis, Synthesis, and Sensemaking
5. Communicating Findings
6. Conclusion

Who this guide is for

Whether you have never heard of peer-led evaluation, are just beginning to incorporate peer-led evaluation principles and tools into your organizational evaluation work, or feel like you have a strong understanding of peer-led evaluation, we think this guide will have something for you.

Created by the Canadian Mental Health Association - Edmonton Region (CMHA-Edmonton), this guide was specifically designed for community practitioners in organizations furthering the work of the Strategy for Community Mental Health.

This guide complements other tools and frameworks CMHA-Edmonton has created including the:

1. Strategy for Community Mental Health
2. Peer-Led Evaluation Framework
3. CMHA Edmonton Strategic Plan 2025-2028

Hopes for the Toolkit

We have two hopes for this toolkit:

1. Build community practitioner knowledge, skills, and confidence in implementing peer-led evaluation approaches and tools in their work.
2. Create avenues for community organizations, doing Community Mental Health work in Edmonton, to share their work and impact with CMHA-Edmonton so that CMHA-Edmonton can better understand how we are collectively moving the needle on the goals outlined in the Strategy for Community Mental Health.

How we hope you will use this guide

This is meant as a practical tool for community practitioners. We hope you will use it in whatever way serves you best.

If you're a complete beginner we recommend you start at the beginning and work your way through the guide in order.

If you already understand what peer-led evaluation is and why it matters, you can skip the introduction and head right to the guided activities that start on page 11.

Feel free to use parts or all of this guide. You might find you spend more time in one section than another depending on what peer-led evaluation skills you most want to strengthen or build.

Acknowledgements

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Edmonton Strategy for Community Mental Health

Part 1. Introduction to Peer-Led Evaluation

I've heard of "participatory" and "developmental" evaluation but never "peer-led".
Peer-led evaluation can be seen as an expression of participatory and developmental evaluation. Peer-led evaluation draws on many of the same principles and values as participatory and developmental evaluation approaches but adapts them to be specific for a mental health context.

What's with the use of "peer"? Who are you referring to?
The language of "peer" is often used in mental health spaces to refer to someone with lived or living experience.Throughout this guide, we use the term broadly and intentionally. "Peer" can include people who access services or supports, caregivers, family members, community members, and others whose lived or living experience shape their understanding of mental health systems and community wellbeing. In other contexts, you might see terms like "clients", "person served", or "service user". Peer can also refer to frontline workers, advocates, and other helpers who support people with lived experience in their mental health, wellness, and recovery. We recognize that people connect differently to these terms, and that language continues to evolve across communities and organizations.

Peer-Led Evaluation As a Paradigm Shift

Peer-led evaluation is an approach where people with lived and living experience of a mental health challenge–including caregivers, frontline workers, and community members–lead and shape the evaluation process. It is built on the belief that those most affected by a system are best positioned to evaluate and improve it.

This approach challenges traditional models of evaluation that are often top-down, clinical, and disconnected from real-life experience. Instead of treating people as "subjects" of research, peer-led evaluation treats community members as analysts, co-designers, and decision-makers. It reimagines evaluation as a tool for truth-telling, learning, and community healing.

Peer-Led Evaluation Approach



Traditional Approaches



> *"How we evaluate matters just as much as what we measure..."*
>
> *(Peer-led Evaluation Framework)*

Rather than seeing evaluation as a compliance tool, peer-led approaches reposition it as a way to be accountable to the whole community, including funders and institutions. Peer-led approaches see evaluation as a tool for systems change, not just measurement. Centering people with lived and living experience throughout the entire evaluation process, peer-led evaluation embeds equity, trauma-informed practice, and relational accountability. This involves working in ways that build trust, reciprocity, and mutual respect.

> *"Traditional evaluation often asks whether something worked. Peer-led evaluation asks whether it worked for the people it was meant to serve, and whether they were meaningfully involved from the start"*
>
> *(Peer-led Evaluation Framework, p. 6)*

Posture or Stance, Not a Checklist
Engaging with peer-led evaluation and committing to grappling with the paradigm shift is not for the faint of heart. It takes ongoing work, intention, and critical reflection to do well. We like to think of doing peer-led evaluation more as a stance or a posture as opposed to a checklist of things to do.

Find Some Critical Companions
Something that can support you in doing this work is to find "critical companions" - others in your organization or field who share similar values and commitments to learning and bringing peer-led evaluation to life in their work. They can provide a valuable sounding board, confidante, and feedback provider as you embark on trying things out, learning, and iterating your practice.

Ethics of Care in Peer-Led Evaluation
Because peer-led evaluation centres lived and living experience, it often involves people sharing personal stories, emotions, and reflections connected to mental health and community life. This makes the work meaningful, but it also brings ethical responsibility for how people are engaged, supported, and protected throughout the process.

Ethics in this work includes how participation is structured and experienced in practice. It involves making sure involvement is voluntary and informed, respecting boundaries, and being clear about how contributions will be used.

It also includes how value is recognized. Fair and meaningful compensation for peer contributions is one way to honour lived experience as expertise and acknowledge the time, knowledge, and emotional labour involved.

Principles of Peer Led Evaluation

Peer-led evaluation is guided by 7 principles. These principles are not just theoretical. They shape how your evaluation is designed, facilitated, and interpreted. They reflect a shift in power - away from expert driven evaluation toward community-led learning.

Principle	Description
Lived and living Experience as Expertise	People with lived experience don't just participate - they lead. Their knowledge shapes the design, methods, and meaning of the work. They are the ones best positioned to ask the right questions, understand what matters, and guide the process forward.
Evaluation for Equity	Evaluation must help close the gap between those who benefit from systems and those who are excluded. It matters both how the work is done and what it achieves. Done well, evaluation can support healing, equity, and systemic change - not just reporting and financial accountability.
Relational Practice and Community Care	Evaluation happens in relationship. It must be built on trust, safety, and mutual care. That includes creating space for grief, joy, creativity, and emotion - not just data. Methods used in this process can include circle check-ins, storytelling and arts-based activities, personalized land acknowledgements, shared meals and informal dialogue, and group agreements and consensus-based decisions.

Principle	Description
Sharing Power and Challenging Assumptions	Questions like: Whose knowledge counts? Who decides what's valid? Support peer-led evaluation. Instead of relying only on technical expertise, the process welcomes stories, emotions, and collective insight. It challenges long-held assumptions like: "professionals always know best", "numbers are more credible than stories", and "efficiency is more important than inclusion".
Shared Understanding, Not Compliance	Evaluation isn't treated as a checklist or audit. It is a way to reflect together and ask questions like: What are we noticing? What are we hearing from each other? What might we need to shift? This approach is focused on learning, responsiveness, and growing together.
Process and Results Matter	Traditional evaluation focuses on outcomes - but how we get there matters just as much. This approach tracks both results based outcomes and process based outcomes. These process outcomes reflect the quality of relationship and the conditions that make real change possible.
Success is Contextual	Communities define success differently. For some, its improved access. For others, it's a story of connection, or a shift in how they feel. Evaluation must reflect that complexity - and honor different ways of knowing.

Why Peer-Led Evaluation Matters

Peer-led evaluation can be a powerful tool to add to your evaluation toolbelt. While it might not serve every evaluation need your organization has, it can bring about some important strengths. Peer-led evaluation:

- **Builds Trust:** People are more likely to participate meaningfully when evaluation is rooted in care, respect, and shared experience.

- **Surfaces Hidden Knowledge:** Many of the most pressing mental health issues—like stigma, racism, or unsafe systems—are best understood by those who have lived through them.
- **Shifts Power:** Community members are not simply consulted; they lead the work. Their knowledge shapes the questions, the methods, and how the findings are interpreted.
- **Leads to More Just Decisions:** When lived experience drives the process, the outcomes are more accurate, ethical, and relevant to the people the system is meant to serve.

Peer-led evaluation offers a framework for reflecting, assessing, and guiding what comes next for an organization and their work. But most importantly, it helps ensure the work stays accountable, focused, and rooted in community knowledge, lived experience, and lasting change.

Setting Up the Journey

It is worth considering the conditions that support this work. Peer-led evaluation is relational work. How you set things up matters as much as the tools you use.

This section focuses on facilitation, organizational readiness, and how to begin in ways that are realistic and sustainable in your context.

The Role of the Facilitator

Facilitators play an important role in peer-led evaluation processes. They help create the conditions for participation, support group dialogue, hold structure, and guide reflection and learning. Good facilitation is less about having all the answers and more about creating spaces where people feel respected, heard, and able to contribute in ways that work for them.

At the same time, facilitators are not counsellors, therapists, or crisis responders. Conversations connected to mental health, systems, trauma, or lived experience can sometimes surface strong emotions or difficult memories. While facilitators should approach this work with empathy and care, it is important to be clear about the limits of the role.

Mental Health Resources

- Distress Line: 780-482-4357 (HELP)
- Suicide Crisis Helpline: 9-8-8
- 211 Alberta: 2-1-1

Alignment with Your Organization and Team

Peer-led evaluation does not need to happen all at once. For many organizations and teams, this work begins through small shifts, such as inviting peers to shape survey questions, trying a storytelling method for the first time, or involving community members more directly in reflection conversations. These small steps matter.

As you think about bringing peer-led evaluation into your work, it can help to reflect honestly on your organization's current culture, readiness, and capacity. Not every organization or team will be ready to fully redesign their evaluation processes overnight, and that is okay. Peer-led evaluation is not about perfection or purity. It is about moving toward more relational, equitable, and community-informed ways of learning.

REFLECTION POINT

What resonates with you about peer-led evaluation? What do you see as its strengths?

How might peer-led evaluation rub up against or create tension with traditional evaluation or decision making approaches that already exist within your organization?

What Peer-Led Evaluation Looks Like in Practice

Peer-led evaluation often looks fundamentally different from conventional evaluation models. It can take many different forms depending on resources available, organizational culture, and project timelines but always at the heart of the process is working to incorporate and centre the perspectives of people with lived and living experience.

In its fullest expression, if peer-led evaluation is being fully lived out within an organization, the evaluation team would have people with lived and living experience working with others to co-design the process, shape the outcomes, and share decision making throughout. We recognize your organization might be at varying degrees of being ready and/or open to this kind of approach to evaluation. That's why, throughout this guide, we've tried to create several different "launching points" for organizations - showing how the spirit of peer-led evaluation can be lived within an organization in big and small ways.

To give you a sense of how peer-led evaluation might show up in practice, here we share some methods used in peer-led evaluation. Methods are diverse but what links them is that they are all relational, creative, and grounded in care. Example methods include:

- Storytelling
- Arts-based reflection
- Circle-based or consensus decision making
- Open community dialogue and co-analysis
- Collaborative creation of indicators and outcomes
- Visual or narrative definitions of "success"

Part 2. Identifying Outcomes & Indicators

Now that you have a sense of what peer-led evaluation is and why it matters, this section moves from concept to practice. Here we'll walk you through a process for identifying the outcomes that matter most – to your organization, to your funders, and most importantly, to the people you serve – and for developing indicators that reflect the full picture of change your work creates.

The Difference Between Outcomes and Outputs

Before diving in, it helps to get clear on a distinction that can sometimes feel blurry: the difference between outputs and outcomes.

Outputs are the measurable activities and products of your work – the things you do and deliver. They answer the question: What did we produce or provide? Examples include the number of workshops held, sessions delivered, or participants served.

Outcomes are the changes that result from your work – shifts in knowledge, skills, relationships, conditions, or wellbeing. They answer the question: What changed because of what we did? For example: participants feel a stronger sense of belonging, or a community member has the tools to advocate for their own needs.

Outputs are important for accountability and reporting. But outcomes are where the real story of your work lives.

Peer-led evaluation is especially interested in outcomes – and in making sure the outcomes we track actually reflect what matters to the people at the centre of the work.

Broadening our Understanding of Outcomes

In traditional evaluation, outcomes are often pre-determined by funders or program designers and tend to reflect what is easiest to measure. Peer-led evaluation asks us to step back and consider: whose definition of success are we using?

Communities define success differently. For some, a meaningful outcome is improved access to services. For others, it's a story of connection – finally feeling seen, or trusting a system that once felt unsafe. Both are valid. Both matter.

This means expanding what we consider "evidence" of change. In peer-led evaluation, valid indicators of progress can include:

- Stories of change shared by people with lived experience
- A growing sense of trust, safety, or inclusion

- Shifts in how people describe themselves or their circumstances
- Language, metaphors, or images that emerge through community dialogue
- Changes in relationships and power dynamics within a program or organization

None of this means abandoning numbers or letting go of funder requirements. It means holding those alongside richer, community-generated forms of knowing – so that your evaluation reflects the full depth of the work you're doing.

Exercise 1: Identifying All Known Outcomes

Every evaluation starts somewhere – and often, the best place to begin is with what you already know. This exercise helps you gather and organize the outcomes that are already on your radar: those named in your funding agreements, embedded in your program design, or expected by your stakeholders.

Think of this as building your foundation. Before we start exploring what might be missing, we want to make sure we have a clear picture of what's already there.

Set aside 30–45 minutes for this exercise. You can do it individually, but it works best with a small team – even two or three colleagues can surface a richer picture together.

Step 1: Brainstorm your Known Outcomes

Step 1a. Start by casting a wide net. Using the questions below as prompts, jot down every outcome you can think of that is connected to your project or initiative. Don't worry about wording or organization at this stage – just get them down.

- What outcomes were listed in your funding application or project proposal?
- What need or gap is your project or initiative designed to address, and what change would tell you that gap is being filled?
- What outcomes matter most to your organization, regardless of what funders are looking for?
- What are you required to report on – to funders, to your board, or to other stakeholders?
- When you imagine this work going really well, what will have changed? For the individuals you serve? For your community?

Jot ideas down...

Step 1b. Once you've brainstormed, record each outcome in Column A of the table on pages 15–20 – one outcome per row. Try to write each one as a change statement (e.g., "Participants will feel a stronger sense of belonging" or "Families will have improved access to mental health supports").

Step 1c. Step 1c. For each outcome, move to Column B on pages 15–20 and identify who will use this information and how. Consider the full range of people who have a stake in knowing whether this outcome is being achieved – this might include your organization's leadership, frontline staff, funders, or people with lived experience. Ask yourself: If we had strong evidence that this outcome was being achieved, who would need to know, and what would they do with that information?

Step 2: Explore the Strategy for Community Mental Health

Now that you have your own outcomes mapped out, take some time to look at the Strategy for Community Mental Health (SCMH). The SCMH represents a bold new vision for mental health support in Edmonton. This step helps ensure your evaluation is connected to the broader goals your work is contributing to – and makes it easier to tell that story to funders and partners.

Review the four outcomes outlined in the SCMH:

Review the four outcomes outlined in the SCMH:

Reach & Awareness

Communities are informed about mental health and available services.

Service gaps and inequities are better understood.

Coordination & Collaboration

People are receiving more seamless, connected care.

Services and providers are working together across sectors.

Access & Navigation

People can find, use and move through services more easily.

Services are culturally relevant, community-rooted, and accessible.

Centering Lived Experience

The voice, insight, and leadership of people with lived and living experience is foundational.

Ask yourself:

- Are any of these outcomes already reflected in your Column A? If so, note the SCMH as an additional user in Column B.
- Are there any SCMH outcomes that relate to your work but aren't yet listed? If so, add them to Column A and note the SCMH in Column B.

This isn't about forcing alignment where it doesn't exist – it's about making visible the connections that are likely already there. By identifying outcomes that align with the Strategy for Community Mental Health, you help paint a picture of the important collective work happening in Edmonton.

Learn more about the Strategy for Community Mental Health on our webpage: https://www.together4cmh.ca/

Project Outcomes Chart Examples:

Column A: Outcome What changed because of what we did?
"Participants will feel a stronger sense of belonging"
"Families will have improved access to mental health supports"

	Column B: User(s) & Use(s) Who will use this information and how? If we had strong evidence that this outcome was being achieved, who would need to know, and what would they do with that information?
	Organization (program staff/leadership): Identifying what programming approaches are building connection and belonging, and which might need to be redesigned. Peers: Understanding whether the program is actually meeting their needs; informing decisions about whether to continue participating or recommend the program to others. Frontline Staff: Reflecting on their practice and relationships with participants; identifying where additional support or follow up may be needed. Strategy for Community Mental Health: Demonstrating progress on the "Centering Lived Experience" outcome and contributing to collective evidence of community mental health impact across Edmonton.
	Organization: Assessing whether current navigation supports, referral pathways, or program design are effectively reducing access barriers. Funder (e.g. City of Edmonton): Reporting on the effectiveness of funded programs in improving service access; informing future funding decisions. Families/Peers: Advocating for their own needs and understanding what supports are available to them. Strategy for Community Mental Health: Contributing evidence toward the "Access & Navigation" outcome; informing system-level planning and coordination across the sector. Partner Organizations: Identifying gaps in the service ecosystem and opportunities for coordination or referral.

Project Outcomes Chart:
Column A: Outcome What changed because of what we did?

	Column B: User(s) & Use(s) Who will use this information and how? If we had strong evidence that this outcome was being achieved, who would need to know, and what would they do with that information?

Project Outcomes Chart:
Column A: Outcome What changed because of what we did?

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Project Outcomes Chart:
Column A: Outcome What changed because of what we did?

	Column B: User(s) & Use(s) Who will use this information and how? If we had strong evidence that this outcome was being achieved, who would need to know, and what would they do with that information?

Exercise 2: Identifying (Un)known Outcomes

Exercise 1 helped you map the outcomes that are already on your radar – the ones named by funders, embedded in your program design, or built into your reporting requirements. But here's an important question: whose priorities shaped that list?

In traditional evaluation, outcomes are most often defined by funders, program designers, or organizational leadership. The perspectives of the people closest to the work – service users, frontline workers, and community members – are frequently absent from that process, even when the work is meant to serve them directly.

This exercise invites you to look at the gaps. What outcomes might matter deeply to the people you serve that haven't made it onto your list yet? What would they say has changed – or needs to change – because of your work?

Ideally, this kind of outcome identification happens before a program or initiative is fully designed, with peers actively involved in shaping what success should look like from the start. We recognize that's not always possible. Wherever you are in your program cycle, this exercise is valuable – it's never too late to ask better questions.

Below are three ways you might approach this exercise. You might work through all three, or you might find that just one or two are the right fit given your current capacity and context. There's no wrong way in – what matters is that you're actively working to surface perspectives that wouldn't otherwise be captured in a typical planning or reporting process.

Set aside 30–45 minutes for planning this exercise with additional time likely needed to conduct the work (depending on the option(s) you choose). We strongly recommend doing it with at least one other colleague or critical companion.

Option A: Take a stakeholder perspective

This option involves setting aside your own organizational vantage point and imaginatively stepping into the shoes of others. It can be done individually or as a reflective team exercise, and requires no additional time to organize or plan. For each stakeholder group below, consider: *what outcomes would matter most to them? What would they hope has changed as a result of this work?*

People you serve (peers):

- What are the biggest challenges or barriers they face that your work is trying to address?
- What would "things getting better" look, feel, or sound like for them?
- What do you hear from them – formally or informally – about what matters most?

Frontline workers:

- What do they observe day-to-day that formal reporting rarely captures?
- What changes in the people they work with do they find most meaningful?
- What frustrations or unmet needs do they regularly witness?

Community members:

- How does your work ripple outward beyond the individuals directly served?
- What would a healthier, more connected community look like in the context of your work?

Add any outcomes that emerge from this reflection to your table from Exercise 1. If a stakeholder group you've identified isn't already listed in Column B for a relevant outcome, add them there too.

Option B: Look at data you already have

Before going out to gather new information, it's worth considering what you might already be sitting on. Many organizations have more insight into stakeholder perspectives than they realize – it just hasn't been looked at through an outcomes lens.

Consider what existing data or feedback channels your organization has access to:

- Past surveys or feedback forms completed by service users
- Notes or themes from advisory boards or community consultations
- Informal feedback gathered by frontline staff
- Any existing community-based or participatory research relevant to your work

Review what this data suggests is important, missing, or needed from the perspective of the people closest to your work. Add any additional outcomes that emerge to your table.

Option C: Engage stakeholders directly

Where you have the capacity, the most powerful way to identify unknown outcomes is simply to ask. Even a handful of conversations with people

from each stakeholder group can surface perspectives that would otherwise be invisible in your evaluation.

In the appendix you'll find some suggested tools and questions to help guide these conversations, including an interview and focus group guide as well as a World Café format for larger group engagement, and ideas for arts based approaches.

If bringing people together isn't currently feasible, here are some lighter-touch alternatives to consider:

- A brief survey shared with service users or program participants
- A standing agenda item at your next staff meeting to gather frontline perspectives
- Consulting your organization's advisory council or board members with lived experience
- Reaching out to peer researchers or community organizations doing related work
- Reviewing complaints, compliments, or informal feedback you've received

Exercise 3: Co-Creating Indicators

You've now built a rich picture of the outcomes that matter – to your organization, your funders, and most importantly, to the people closest to your work. This exercise takes the next step: turning those outcomes into indicators.

What is an indicator?

An indicator is a specific, observable sign that tells you change is happening. It answers the question: how will we know? If an outcome is the destination, an indicator is how you recognize when you've arrived – or that you're moving in the right direction.

In traditional evaluation, indicators tend to be narrow and numbers-focused: how many people attended, how many completed the program, how many reported improvement on a standardized scale. These have their place. But in peer-led evaluation, we cast the net wider. A powerful indicator might be a shift in how someone talks about themselves. It might be that a person who once came to a program alone now brings a friend. It might be a story that keeps surfacing across multiple conversations – one that points to something changing in the community that no survey would have caught.

The goal of this exercise is to develop indicators that are meaningful, specific, and reflective of the full range of outcomes you've identified – including those that came directly from the people you serve.

This exercise works best as a collaborative process. Where possible, involve peers, frontline workers, or other stakeholders in developing indicators – particularly for outcomes that came directly from their perspectives. They are often best placed to know what a meaningful sign of change actually looks like in practice.

Step 1: Cluster your Outcomes

Before developing indicators, it helps to organize your outcomes into clusters – groups of related outcomes that point toward a common area of change. This makes the process more manageable and helps you develop indicators that are efficient, capturing multiple related outcomes at once rather than treating each one in isolation.

Look at the full list of outcomes you've gathered across Exercises 1 and 2. Read through them slowly and begin to notice where there is overlap, alignment, or connection. Some outcomes will naturally belong together – they might be pointing at the same underlying change from different angles, or be expressed differently by different stakeholders but essentially describing the same thing.

1. Group related outcomes together into clusters. There's no right number of clusters – let the natural groupings in your data guide you.
2. For each cluster, give it a short, plain-language name that captures the shared theme. This doesn't need to be formal or precise – it just needs to make sense to the people who will be working with it. For example: "Belonging and Connection", "Access to Supports", or "Feeling Safe and Respected."
3. Record each cluster and its name in Column A of one of the tables on pages 27–30.

If you're unsure where a particular outcome belongs, don't overthink it – place it where it feels most natural and move on. The clusters are a working tool, not a final taxonomy.

Step 2: Develop Indicators for Each Cluster

Now comes the heart of the exercise: for each outcome cluster, identify the specific signs and signals that would tell you change is happening.

For each cluster in Column A, ask: *If this change were really occurring – if things were genuinely moving in the right direction for the people we serve – what would we be able to see, hear, or notice?*

Try to think broadly. Indicators might include:

- Things people say – words, phrases, or shifts in how they describe themselves or their situation
- Things people do – behaviours, choices, or patterns that reflect a change
- Things that can be counted – attendance, referrals, program completions
- Things that can be felt – a shift in the atmosphere of a group, a change in the quality of relationships
- Stories or moments – specific examples that would tell you something real has shifted

Record your indicators in Column B of the table. Aim for a mix – at least one or two that go beyond what can be easily counted.

A note on peer involvement: For outcomes that were identified by or with the people you serve, try wherever possible to involve them in developing the indicators too. Ask: *"If this change were really happening for you, how would you know? What would be different?"*

Their answers will often be more specific, more honest, and more meaningful than anything generated from an organizational vantage point alone.

Step 3: Identify your Evaluation Questions

With your indicators in place, the final step is to get clear on what specific questions you will need to ask – of whom, and through what methods – in order to gather evidence on each indicator.

For each row in your table, move to Column C and ask: What do we actually need to find out in order to know whether this indicator is present?

These evaluation questions will become the foundation for the data gathering methods you explore in the next section of this guide. Being specific here saves a lot of time later – it helps you choose methods that are genuinely fit for purpose rather than defaulting to a standard survey because it's familiar.

For example:

- *If your indicator is "participants use language of belonging when describing their experience," your evaluation question might be: "How do participants describe their sense of connection to this program and to other participants?" – which points you toward interviews, focus groups, or facilitated storytelling rather than a numerical rating scale.*
- *If your indicator is "participants access at least one new mental health support within three months," your evaluation question might be: "What supports have participants connected with, and what helped or hindered that process?" – which might be answered through a brief follow-up survey or case tracking.*

Record your evaluation questions in Column C. Don't worry if you're not yet sure how you'll answer them – that's what the next section is for.

A Note Before Moving On

The table you've now built – outcomes, indicators, and evaluation questions – is the backbone of your evaluation plan. It reflects not just what your organization is required to measure, but what genuinely matters to the people at the centre of your work.

Refer back to it often as you move through the rest of this guide. It will help you stay grounded in purpose and make intentional choices about how you gather, analyze, and share what you learn.

Indicators Chart	
Column A: Outcome Cluster *Clusters of similar outcomes - What changed because of what we did?*	**Column B: Indicators** If this change were really occurring – if things were genuinely moving in the right direction for the people we serve – what would we be able to see, hear, or notice?

Feeling a bit stuck or not sure where to start? To support you in completing this chart we have included two robust examples on the following pages.

	Column B: Evaluation Questions What specific questions do we need to ask to give us the information we need?

Indicators Chart	
Column A: Outcome Cluster *Clusters of similar outcomes - What changed because of what we did?*	**Column B: Indicators** *If this change were really occurring – if things were genuinely moving in the right direction for the people we serve – what would we be able to see, hear, or notice?*

	Column B: Evaluation Questions *What specific questions do we need to ask to give us the information we need?*

Example Indicators and Evaluation Questions

As you look at these examples, a few things are worth drawing your attention to.

Indicators can take many forms. You'll notice that the indicators in Column B aren't all numbers or counts. Some point to things that can be observed – a shift in how someone engages with their peers, or a change in the language they use to describe themselves. Others point to stories – specific moments or experiences that would tell you something real has shifted. Still others are more quantifiable – a person accessing a new service, or being able to name someone they can count on. All of these are valid. A strong set of indicators will usually include a mix, capturing both the measurable dimensions of change and the dimensions that are harder to count but no less real.

The people you serve helped shape these outcomes – and they should help shape the indicators too. You'll notice that each cluster includes outcomes that were identified by peers alongside those identified by organizations, funders, and the Strategy for Community Mental Health. This is intentional. When outcomes come directly from the people you serve, it's worth asking them to help develop the indicators too. They are often best placed to know what a meaningful sign of change actually looks and feels like in their own lives.

An indicator developed with a peer will almost always be more specific, more honest, and more grounded than one developed without them.

Your evaluation questions point you toward your methods. Look at the questions in Column C and notice how different questions seem to call for different approaches. Some naturally point toward conversations – interviews, focus groups, or facilitated storytelling. Others suggest observation or reflective practice by frontline staff. Others might be answered through a simple survey or tracking tool. This is intentional. Rather than choosing a data collection method first and then figuring out what to do with it, this process works the other way around – starting with what you genuinely need to know and letting that guide how you gather information. The next section of this guide will help you match your evaluation questions to methods that are the right fit.

Example 1.

Indicators Chart		
Column A: Outcome Cluster Belonging and Connection	**Column B: Indicators**	**Column B: Evaluation Questions**
Outcomes included in this cluster: Participants will feel a stronger sense of belonging (organization-identified) I will feel like I have people I can count on (peer-identified) Communities will feel more connected and less isolated (SCMH-identified)	Participants use language of belonging, connection, or feeling "at home" when describing their experience Participants who previously attended alone begin bringing others – a friend, family member, or neighbour Frontline workers observe changes in how participants engage with each other over time – more ease, humour, trust, or mutual support Participants can name at least one person in the program they feel they could reach out to outside of program hours Stories or moments shared by participants that describe feeling seen, valued, or less alone	How do participants describe their sense of connection to this program and to other participants? What changes, if any, have participants noticed in their relationships or social connections since joining this program? What do frontline workers notice about how participants relate to each other, and how has that changed over time? Do participants feel they have people in this program they could turn to for support? What stories are participants telling about their experience – and what do those stories reveal about connection and belonging?

Example 2.

Indicators Chart		
Column A: Outcome Cluster Access to Supports and Services	**Column B: Indicators**	**Column B: Evaluation Questions**
Outcomes included in this cluster: Families will have improved access to mental health supports (organization-identified) I will know where to go when I need help (peer-identified) Reach and awareness of mental health supports will increase across Edmonton (SCMH-identified)	Participants can name at least one mental health support or service they have connected with as a result of this program Participants report feeling more confident navigating the mental health system than they did before Barriers that previously prevented access – language, cost, transportation, stigma – are named by participants as reduced or removed Frontline workers observe fewer instances of participants expressing confusion or helplessness about where to turn Participants share stories of a specific moment when they knew where to go or who to call – and followed through	What supports or services have participants accessed, and what role did this program play in that? How has participants' confidence in finding and accessing supports changed over time? What barriers to accessing supports did participants face before, and which of those feel different now? What do frontline workers notice about how participants talk about and navigate available supports? Can participants describe a time when they needed support and knew how to find it? What made that possible?

Part 3. Data Gathering Tools & Methods

In Section 2, you did some important groundwork. You identified the outcomes that matter to your project – drawing on what your funders expect, what your organization values, and importantly, what the people you serve care about most. You then clustered those outcomes into themes and began identifying indicators: the specific signs that would tell you progress is happening. Finally, you surfaced the questions you most need to answer to understand whether your work is making a difference.

The last piece you worked on –your questions–is exactly where we're focusing to get started in Section 3.

Linking your Previous Work to the Work that Lies Ahead

Think of the toolkit so far as a process of getting clearer and clearer about what matters. Section 1 introduced the values and principles that guide peer-led evaluation – the why behind the approach. Section 2 helped you figure out what you want to learn. Section 3 is about how you'll learn it.

The questions you identified at the end of Section 2 are your compass here. Every method and tool in this section is a potential way to answer those questions – with and alongside the people your work is meant to serve.

Overview of Part 3

This section introduces you to a set of participatory data gathering tools and methods that are well-suited to peer-led evaluation. These aren't your typical surveys or standardized questionnaires. They are approaches that invite people into the process – as contributors, co-analysts, and collaborators – rather than treating them as sources to extract information from.

You'll find ten methods in this section. We'll start by explaining what makes participatory methods a good fit for peer-led evaluation, and then offer a guide to help you decide which tools make the most sense for your organization and your questions. From there, we'll walk through each method in depth. By the end of this section you'll have a clearer sense of which methods are best suited to your context and a practical plan for putting them into action.

Why Participatory Methods?

Traditional data gathering tends to be something done to people. A researcher or evaluator designs the tool, asks the questions, and interprets the answers – often without much input from the people most affected by the work being evaluated. When peers are left out of this process, you lose something important: the distinct lenses, perspectives, and ways of making sense of experience that only come from having lived it. Those perspectives don't just add richness to your data – they can fundamentally change what you notice, what you conclude, and what you decide to do next.

Participatory methods work differently. They are designed to involve people – especially those with lived and living experience – as active participants in the data gathering process itself. This means the questions being asked are more likely to reflect what actually matters. It means people are more likely to engage honestly and openly. And it means the data you collect is more likely to reflect the full, complex reality of your work and its impact.

This is why participatory methods are a natural fit for peer-led evaluation. They aren't just compatible with the values outlined in Section 1 – they are an expression of them. When you use a participatory method well, you aren't just gathering data. You are building trust, sharing power, and creating space for the kinds of knowledge that conventional evaluation often misses entirely.

Participatory methods also tend to be more culturally responsive. Because they are flexible and relational by design, they can be adapted to better reflect the norms, communication styles, and ways of knowing of the communities you work with. This matters enormously in mental health contexts, where people's willingness to engage depends heavily on whether they feel safe, respected, and genuinely heard.



Exercise 3.1: Choosing the Right Tools for Your Context

This section offers ten different data gathering methods. You do not need to use all of them – and trying to do so would likely stretch your organization thin. The goal is to choose one or two methods that are a genuine fit for your context, your capacity, and most importantly, the questions you identified in Section 2.

There is no single right answer here. Different methods will be the right choice for different organizations, and what works well in one context may not work in another. The prompts below are designed to help you think through which methods make the most sense for where you are right now.

Start with Your Questions

Go back to the questions you identified in Section 2. Record them here again so you can hold them in mind as you read through this section. Ask yourself: *what kind of information would actually answer this question?* Some questions call for personal stories and in-depth conversation. Others might be better answered through visual or creative methods. Some lend themselves to structured tools like surveys or scorecards. Let your questions do the steering.

Record your questions here...

Consider Your Capacity & Resources	Think About Staff & Peer Skills & Comfort	
Some methods require more time, staffing, or budget than others. Before committing to a method, ask: • How much time do we realistically have to gather data? • How many staff or volunteers can support this process? • Do we have a budget for materials, honoraria, or facilitation support? • Is this a one-time data gathering effort, or something we want to sustain over time?	Some methods work best when the people facilitating them have specific skills – in facilitation, in arts-based practice, or in working with sensitive topics. Others are more accessible to facilitators of any background. Ask: • What skills and strengths do our staff and peers bring? • Are there methods that would play to those strengths? • Are there methods that would require training or support we don't currently have?	

	Reflect on Your Organizational Culture	Think About the People You Want to Involve	Select the Tools You'll Use
	Some methods will feel like a natural extension of how your organization already works. Others might represent a significant stretch. Neither is necessarily wrong – sometimes a stretch is worth it. But it's worth being honest about what your organization is ready for. Ask: • How comfortable is our organization with creative or arts-based approaches? • Do we have existing relationships with peers that would support deeper engagement methods? • How much experience do we have facilitating participatory processes?	Different methods will feel more accessible and appropriate for different groups of people. Consider: • What communication styles and preferences do the people we serve tend to have? • Are there language, literacy, or accessibility considerations we need to account for? • What methods are most likely to feel safe, welcoming, and relevant to our peers? Each method description in this section includes information about who it is best suited for, what capacity it typically requires, and any specific skills or considerations to keep in mind. Use those descriptions alongside the prompts above to make your choice.	For the burning questions you identified in column one, select the tools you'll use as part of your evaluation and identify them in this column. Don't feel like you need to select too many - 1–2 methods can go a long way in generating rich data to work with. A brief overview and then more detailed description of some sample participatory methods are provided on the pages that follow to inspire your choice.

A Map of the Methods

Below is a quick overview of the ten methods covered in this section, organized by type. Each method is described in detail later in the section – this is just meant to give you a sense of the landscape before you dive in.

Relational & Dialogue-Based

Method	Description	Best For
Talking Circles	A structured, facilitated group conversation rooted in Indigenous practices that creates space for every voice to be heard equally.	Organizations wanting to build trust and hear from multiple people in a relational, non-hierarchical way.
Peer Interviews	Conversations between peers – where people with lived experience interview others with lived experience – to gather rich, personal stories and insights.	Organizations wanting to gather in-depth individual perspectives in a way that feels safe and reciprocal.
Most Significant Change	A storytelling-based method where peers share stories of meaningful change, which are then collectively reviewed and discussed to surface what matters most.	Organizations wanting to understand the deeper, often unexpected impact of their work.

Relational & Dialogue-Based

Method	Description	Best For
Photovoice	Participants use photography to document their experiences and then come together to discuss and interpret what the images reveal.	Organizations working with people who express themselves more easily through visuals than words, or wanting to surface community perspectives in a tangible way.
Digital Storytelling	Participants create short personal videos or audio narratives that capture their experiences and perspectives.	Organizations wanting to centre peer voices in a format that can also be used for advocacy and sharing.
Community Mapping	Participants collaboratively create visual maps of their community, identifying assets, gaps, and experiences that matter to them.	Organizations wanting to understand how people experience their community and what feels accessible, safe, or missing.
Body Mapping	Participants create life-sized drawings of their bodies to explore and express their experiences, emotions, and journeys.	Organizations working with people processing complex or embodied experiences, where words alone may feel insufficient.

Structured & Participatory

Method	Description	Best For
Co-Design Surveys	Surveys that are created with and by peers, ensuring the questions reflect what actually matters to the people being asked.	Organizations wanting to gather broader quantitative or structured data while keeping the process peer-led.
Community Scorecards	A participatory tool where community members assess the quality and impact of services or programs using criteria they help define.	Organizations wanting structured, actionable feedback from peers on how well their programs are working.
Participatory Observation / Field Notes	Frontline staff or peers systematically document what they notice in day-to-day interactions and program delivery.	Organizations with limited capacity for structured data gathering, or wanting to capture real-time, in-the-moment insights.

Methods Breakdown

Talking Circles *Relational & Dialogue-Based*

What you need. 🕐 60–90 min | 👥 5–15 people | 📋 Talking piece, open prompt, circular seating | ⭐ Beginner-friendly

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What it is. A talking circle is a structured dialogue practice rooted in Indigenous traditions of collective wisdom and relational accountability. Participants sit in a circle and take turns speaking – guided by a shared question or prompt – while others listen without interruption. Only the person holding the talking piece speaks.

Best for. Gathering honest, unhurried perspectives across a group – especially where power differences might otherwise shape who speaks and who stays quiet.

How to do it.

1. Arrange seating in a circle and introduce the talking piece and its purpose.
2. Open with group agreements – confidentiality, speaking from personal experience, listening without judgment.
3. Share a clear, open-ended prompt tied to your evaluation question.
4. Pass the talking piece around – each person speaks only when holding it. Passing is always okay.
5. After all rounds, invite brief collective reflection: what patterns or themes did we notice together?

Peer-led lens. Invite peers to help shape the prompt before the circle begins – this shifts ownership of the inquiry from the start. Consider whether a peer can co-facilitate or serve as circle keeper. The format naturally equalizes voice, but pay attention to who speaks first (it sets a tone) and make explicit that silence and passing are genuinely welcome.

Go deeper. Talking circles have a rich practice tradition. If your team is new to facilitating them – particularly in Indigenous community contexts – we recommend seeking out facilitation training or guidance from Indigenous-led organizations in your area before using this method.

Peer Interviews *Relational & Dialogue-Based*

What you need. 🕐 45–60 min per interview | 👥 1:1 | 📋 Question guide, recording device or note-taker, consent form | ⭐ Beginner-friendly with preparation

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What it is. Peer interviews are one-on-one conversations where someone with lived experience interviews another person about their experience of a program, service, or issue. The shared context between interviewer and interviewee often opens up more honest, nuanced conversation than a traditional staff-led interview.

Best for. Capturing individual stories and experiences in depth – especially where trust or safety may affect what people are willing to share with staff or evaluators.

How to do it.

1. Develop 5–8 open-ended questions grounded in your evaluation questions – ideally with peer input.
2. Recruit and orient peer interviewers; practice the guide together before going live.
3. Establish informed consent and confidentiality with each participant before beginning.
4. Conduct interviews in a private, comfortable setting – let conversation flow beyond the guide where relevant.
5. After interviews, gather peer interviewers to debrief: what surprised them, what patterns they noticed, what felt important.

Peer-led lens. The real value here is in who asks the questions. Peers often surface things a staff interviewer wouldn't – through shared language, shared experience, or simply being less associated with the organization's authority. Invest time in preparing peer interviewers well; the orientation conversation is part of the evaluation, not just logistics.

Most Significant Change *Relational & Dialogue-Based*

What you need. 🕐 Story collection: 20–30 min per person; Story review: 2–3 hrs for group | 👥 Any size for collection; 5–10 for review | 📋 Story prompt, collection method (written, audio, or verbal), review guide | ⭐ Moderate

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What it is. Most Significant Change (MSC) is a storytelling-based method where participants are asked to share a story about the most significant change they experienced as a result of a program or service. These stories are then reviewed collectively to identify patterns, values, and what "significance" means to different people.

Best for. Capturing unexpected or complex outcomes that wouldn't show up in a standard survey – especially useful when you want to understand what change actually looks like for the people you serve.

How to do it.

1. Agree on a "domain of change" – the area of life or experience you're most interested in (e.g. connection, confidence, sense of safety).
2. Ask participants: *"During the past [time period], what do you think was the most significant change in [domain]? Please tell a story."*
3. Collect stories through whatever method works best – written, spoken, or in small group settings.
4. Bring a review group together (which can include peers) to read or hear the stories and discuss: which story represents the most significant change, and why?
5. Document both the selected stories and the reasons behind the choices – the reasoning is as valuable as the stories themselves.

Peer-led lens. Peers can be involved at every stage – as story contributors, story collectors, and story reviewers. The review conversation is where MSC really comes alive: inviting peers to help define what "significant" means puts them in the role of sense-makers, not just data sources. Be transparent about how the stories will be used and who will see them.

Go deeper. MSC has a well-developed practice tradition. For a thorough guide, see The Most Significant Change Technique: A Guide to Its Use by Rick Davies and Jess Dart, available free online at mande.co.uk.

Photovoice *Creative & Visual*

What you need. 🕐 Multiple sessions over 2–4 weeks | 👥 5–15 participants | 📋 Cameras or smartphones, photo release consent forms, discussion prompts, display materials | ⭐ Moderate

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What it is. Photovoice is a participatory method where community members use photography to document their experiences, environments, and perspectives. Participants then come together to share and discuss their images, generating collective reflection and evidence that can inform evaluation and advocacy.

Best for. Surfacing community perspectives that are hard to capture in words alone – particularly around place, belonging, safety, and everyday experience.

How to do it.

1. Orient participants to the method and its purpose; co-develop a guiding question or theme together.
2. Establish clear consent and ethics guidelines around photography – who can be photographed, how images will be used.
3. Give participants time (days or a week) to take photos in response to the guiding prompt.
4. Bring participants together to share images using a structured discussion format – ask: *What do you see? What is really happening here? How does this relate to our work or community?*
5. Collectively identify themes and key images; discuss how findings will be shared and with whom.

Peer-led lens. Photovoice is inherently peer-centred – participants are the authors of the evidence. Where possible, involve peers in developing the guiding question and in decisions about how and where images are displayed or shared. Be especially attentive to privacy, dignity, and consent, particularly when images depict sensitive aspects of people's lives or communities.

Go deeper. Photovoice was developed by Caroline Wang and Mary Ann Burris. Their foundational article "*Photovoice: Concept, Methodology, and Use*" (Health Education & Behavior, 1997) is widely available and a useful orientation. The Photovoice Canada organization also offers practical resources and training.

Digital Storytelling *Creative & Visual*

What you need. 🕐 Workshop process typically spans 2–3 days | 👥 4–12 participants per cohort | 📋 Computers or tablets, video/audio editing software, facilitator with digital storytelling experience | ⭐ Advanced – facilitator experience recommended

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What it is. Digital storytelling is a method where individuals create short, personal narrative videos – typically 2–5 minutes – combining their own voice, images, and sometimes music. The process of creating the story is often as meaningful as the story itself, making it both a reflective and an evaluative tool.

Best for. Documenting personal transformation, amplifying voices that are rarely heard in formal evaluation, and creating compelling evidence for advocacy or reporting.

How to do it.

1. Host a story circle where participants identify and develop their personal story – the script or narrative is the foundation.
2. Support participants to gather or create images, photos, or drawings that accompany their story.
3. Record participants reading or narrating their script.
4. Edit audio, images, and any music together into a short video – this can be done by participants with support, or by a facilitator.
5. Host a screening or sharing event where participants show their stories and reflect on the process together.

Peer-led lens. The story belongs to the person who tells it – editorial control should rest with them. Be clear from the start about how stories will be used, who will see them, and whether participation is opt-in at each stage. The process of crafting a story can surface difficult emotions; ensure emotional support is available throughout.

Go deeper. Digital storytelling is a craft with a rich history. The StoryCenter (storycenter.org) is a leading organization in this space and offers training, resources, and facilitation guides. We recommend connecting with a facilitator experienced in digital storytelling before running this method for the first time. Project Citizenship (https://www.projectcitizenship.com), a social change initiative by Skills Society, is a local example of this method.

Community Mapping *Creative & Visual*

What you need. 🕐 90–120 min | 👥 5–20 participants | 📋 Large paper or whiteboard, markers, sticky notes, optional printed base maps | ⭐ Beginner-friendly

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What it is. Community mapping is a visual, participatory method where community members collaboratively draw or build a map of their neighbourhood, community, or experience – marking assets, barriers, services, and gaps. The map itself becomes a shared artifact for discussion and analysis.

Best for. Understanding how people experience their community spatially – identifying where resources exist and where they don't, and revealing how different people navigate the same environment differently.

How to do it.

1. Introduce the purpose and invite participants to think about their community from their own experience – not what it "should" look like.
2. Start with a base – either a blank sheet or a simple printed map of the area – and invite participants to begin marking what they know.
3. Use prompts to draw out different layers: *Where do you feel safe? Where do you go for support? Where do gaps exist?*
4. Encourage conversation as people map – the dialogue is as important as what ends up on the paper.
5. Debrief as a group: *what patterns emerge? What surprises? What does the map reveal about needs, strengths, or priorities?*

Peer-led lens. Different people map the same community very differently – and that divergence is data. Pay attention to whose landmarks appear and whose don't, and make space for those differences to be named. Peers can co-facilitate the mapping process and lead the debrief, especially when they share lived experience with the community being mapped.

Go deeper. For most community organizations, community mapping is accessible without additional training. If you want to extend into digital or GIS-based mapping, organizations like the Tamarack Institute have published practical guides on asset mapping and community development applications.

Body Mapping *Creative & Visual*

What you need. 🕐 Half-day to full-day workshop, or multiple shorter sessions | 👥 4–10 participants | 📋 Large paper rolls, art supplies, facilitation guide, trauma-informed facilitator | ⭐ Advanced – trauma-informed facilitation essential

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What it is. Body mapping is an arts-based method where participants create life-sized drawings of their own body and use it as a canvas to represent their experiences, emotions, health, identity, and journey. The resulting maps are rich, personal documents that can surface insights no survey or interview could reach.

Best for. Exploring deeply personal experiences – particularly around health, trauma, identity, and healing – in a way that centres the whole person, not just their words.

How to do it.

1. Create a safe, supportive environment with clear group agreements before beginning.
2. Participants lie on large paper while a partner traces their body outline.
3. Using prompts, participants fill in their body map – inside and outside – with images, words, colours, and symbols representing their experience.
4. Participants share their maps with the group at whatever level of depth they choose.
5. Facilitate a collective reflection on themes, patterns, and what the maps reveal together.

Peer-led lens. Body mapping touches on identity, trauma, and lived experience in direct and sometimes unexpected ways. Peer facilitators with relevant lived experience can be powerful in this role – but should have support and debriefing available to them as well. Emotional safety is not a side consideration here; it is the precondition for the method to work.

Go deeper. Body mapping has deep roots in HIV/AIDS community research and has been developed significantly by Jonathan Morgan and the Memory Box Project. We strongly recommend seeking out facilitation training before using this method. The handbook *Body Mapping: A Guide* by Jonathan Morgan is a foundational resource and widely available online.

Co-Design Surveys *Structured & Participatory*

What you need. 🕐 Co-design session: 1–2 hrs; Survey administration: ongoing | 👥 Co-design group: 4–8 peers; Survey: any size | 📋 Draft questions, feedback process, survey platform or paper forms | ⭐ Beginner-friendly

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What it is. Co-design surveys are surveys created in partnership with the people who will take them – rather than designed solely by evaluators or staff. The process of designing the survey together ensures the questions reflect what actually matters to the community, and that the language used is accessible and resonant.

Best for. Gathering structured, comparable data across a larger group – while ensuring the questions asked are grounded in community perspectives rather than organizational assumptions.

How to do it.

1. Start with your evaluation questions and draft a set of potential survey questions – these are a starting point, not a final product.
2. Bring a small group of peers together to review and respond to the draft: Are these the right questions? Is anything missing? Does the language feel right?
3. Revise the survey based on their input; where possible, bring it back for a second look before finalizing.
4. Pilot the survey with a small group before wider distribution and adjust based on their experience completing it.
5. Share findings back with the co-design group – close the loop on what their input helped create.

Peer-led lens. The co-design process is where peer involvement matters most – not as a checkbox, but as a genuine shaping of what gets asked and how. Even small adjustments to language, framing, or question order based on peer input can significantly affect how comfortable people feel responding honestly. Consider whether peers can also be involved in distributing and explaining the survey to their networks.

Community Scorecards *Structured & Participatory*

What you need. 🕐 2–3 hours | 👥 10–30 participants | 📋 Scorecard template, facilitation guide, flip charts or display materials | ⭐ Moderate

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What it is. A community scorecard is a participatory tool where community members assess the quality and effectiveness of a service or program against a set of criteria they have helped define. The result is a structured, visual "score" that reflects community perspectives and opens dialogue between service providers and those they serve.

Best for. Creating structured accountability conversations – particularly useful when an organization wants community members to evaluate its services directly, not just participate in them.

How to do it.

1. Work with a small group of community members to identify the criteria that matter most for evaluating the service or program – what does "good" look like to them?
2. Design a simple scorecard template based on those criteria, using a clear and accessible rating scale.
3. Facilitate a community session where participants independently score the service against each criterion.
4. Compile and display the scores; facilitate discussion around areas of agreement and divergence.
5. Bring community members and service providers together to discuss findings and agree on responses or next steps.

Peer-led lens. The power of the scorecard is in step 5 – the dialogue it creates between community and organization. This only works if that conversation is genuinely two-way and if the organization is prepared to hear and act on critical feedback. Peers can co-facilitate both the scoring session and the dialogue, which shifts the dynamic from "being evaluated" to "evaluating together."

Go deeper. Community scorecards have been used widely in international development and health settings. The World Bank and CARE International have published practical guides on scorecard facilitation that, while developed in different contexts, offer useful process frameworks adaptable to local community settings.

Participatory Observation & Field Notes *Structured & Participatory*

What you need. 🕐 Flexible – single sessions or extended periods | 👥 1 observer; any setting size | 📋 Field notes template, observation guide, consent process for the setting | ⭐ Beginner-friendly with structure

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What it is. Participatory observation involves an evaluator – or a peer evaluator – spending time in a program or community setting, observing interactions and capturing what they notice through structured field notes. Rather than extracting people from their context for interviews or surveys, this method meets people where they are.

Best for. Understanding what a program looks, feels, and sounds like in practice – capturing the informal, relational, and hard-to-articulate dimensions of community work that other methods miss.

How to do it.

1. Clarify the focus of your observation – what are you paying attention to, and what evaluation question does it connect to?
2. Develop a simple field notes template that prompts both factual observation (*what happened*) and interpretive reflection (*what it might mean*).
3. Obtain consent from relevant parties – participants, staff, and organizational leadership – about the presence and purpose of an observer.
4. Conduct observation sessions and write up field notes promptly, while detail is fresh.
5. Review field notes across multiple sessions to identify patterns, surprises, and themes worth exploring further.

Peer-led lens. When peers serve as observers, they notice things a staff evaluator wouldn't – and community members often behave more naturally in their presence. If using peer observers, invest in orienting them to the field notes process and debrief with them after each session; their interpretive reflections are data too. Be transparent with everyone in the setting about who is observing and why.

Go deeper. No specialized training is required for basic participatory observation. For a deeper grounding in ethnographic approaches, Qualitative Research & Evaluation Methods by Michael Quinn Patton offers an accessible and thorough entry point.

Wrapping Up: You Have What You Need to Get Started

You've now worked through the full arc of Section 3 – from understanding why participatory methods matter, to choosing the right approach for your context, to having a practical guide for each method at your fingertips.

You don't need to use every method in this section. The goal was never comprehensiveness – it was to give you enough to make a genuine, informed choice about how to gather data in a way that reflects your organization's values and the people you serve.

As you move into data gathering, a few things are worth keeping in mind. Methods rarely go exactly as planned, and that's okay. Stay curious about what's working and what isn't. Keep checking in with peers and colleagues about how the process feels, not just what it's producing. And remember that the way you gather data is itself part of the story you'll eventually tell.

In Section 4, we'll turn to what comes next: making sense of what you've gathered, finding patterns and meaning in the data, and involving peers in that analysis process just as you have in this one.

Part 4. Analysis, Synthesis, and Sensemaking

Analysis Isn't a Phase– It's a Practice

It's easy to think of analysis as something that happens at the end – once the interviews are done, the surveys are collected, the circles have closed. But in peer-led evaluation, analysis begins much earlier than that. It starts the moment someone shares a story that surprises you, or when a pattern shows up in a conversation that you weren't expecting. Noticing those moments, and staying curious about them, is the beginning of analysis.

This section is about developing that habit of ongoing inquiry – not rushing to conclusions, but building a practice of collective reflection that runs alongside your data gathering rather than waiting until it's finished. By the time you sit down to formally make sense of your data, you'll already have a head start.

What Sensemaking Actually Looks Like

Sensemaking is not about running statistics or producing a polished report. At its heart, it's about coming together – with your team, and with peers – to ask honest questions of the information you've gathered and to sit with what it's telling you.

In peer-led evaluation, sensemaking is a relational process. It happens in conversation. It makes room for uncertainty, for disagreement, and for the kinds of insights that only emerge when people with different vantage points are in the same room looking at the same information.

Some of the most important questions you can bring to your data are also the simplest:

- What are we noticing?
- What patterns keep coming up across different sources or conversations?
- What surprises us – and why?
- Whose voices are most present in this data? Whose might be missing?
- What does this tell us about how our program or service is landing?
- What does this mean for how we work?
- What might we need to change or try differently?
- What are we proud of? What are we unsettled by?

There are no wrong answers to these questions. The goal is not consensus – it's honest, collective reflection that moves you toward understanding.

Involving Peers in Analysis– Why It Matters

In many evaluation processes, data analysis is handed off to a staff member or consultant who reviews the information and produces findings. In peer-led evaluation, that approach misses something important.

Interpretation is not neutral. The meaning we make of data is shaped by who we are, what we've experienced, and what we've been taught to look for. When people with lived experience are part of the analysis process, they bring unique interpretive lenses. They can catch things that might otherwise get missed. They can shed light on new perspectives that reflect their lived realities. They ask questions that reframe what the data is actually saying.

Involving peers in analysis is also a matter of consistency. If peers helped shape the evaluation questions, contributed their stories and perspectives as data, and co-designed the methods – it follows that they should be part of deciding what it all means. Anything less is a partial process.

This doesn't require a formal research background. It requires curiosity, honesty, and a willingness to engage with what the data is telling you – qualities peers bring in abundance.

Principles for Peer-Led Sensemaking

Whether you're reviewing field notes, listening back to interview recordings, or looking at survey results together, a few principles can guide how you approach the process:

Start with noticing, not conclusions. Before anyone interprets, spend time simply naming what's there. What appears often? What stands out? What's absent? This creates a shared foundation before meaning-making begins.

Make the process visible. Be transparent about how you're moving from data to interpretation. When someone draws a conclusion, ask: what in the data leads you there? This keeps the process honest and grounded.

Hold multiple interpretations at once. Different people will read the same data differently – and that's valuable, not problematic. Sit with competing interpretations before deciding which ones to carry forward.

Name what's missing. Gaps in data are data too. If certain voices aren't represented, or certain questions went unanswered, that's worth naming explicitly as part of your findings.

Let peers lead the meaning-making. Where possible, structure sensemaking sessions so that peers are not just present but actively leading the interpretation. Their reading of the data is not a supplement to the "official" analysis – it is central to it.

Stay connected to the original questions. It's easy to get pulled toward interesting tangents. Keep returning to the evaluation questions you identified in Section 1 – are you finding answers? Are the questions themselves shifting based on what you're learning?

A Simple Structure for Your Sensemaking Process

When you're ready to bring your data together for collective review, here is a simple process to follow. It's not the only way – but it's a place to start.

1. **Gather what you have.** Collect all your data sources in one place – notes, stories, images, scores, observations. Get a sense of the full picture before diving in.
2. **Surface patterns together.** In a group setting, share what each person is noticing. Look for themes that appear across multiple sources or come up repeatedly. Write them where everyone can see them.
3. **Ask the hard questions.** Use the sensemaking questions from earlier in this section to push past surface observations. What does this really tell us? What are we being asked to sit with?
4. **Interpret what the patterns mean.** Move from what we're seeing to what it means for our work. This is where peer voices matter most – invite explicit interpretation, not just description.
5. **Identify what you want to carry forward.** What findings feel most important to share? What will you act on? What questions are you left with that deserve further inquiry?

Working with Different Kinds of Data

You may have gathered stories, images, observations, scores, or some combination – and sensemaking looks a little different across these. A few brief principles:

Stories and narratives ask to be heard and discussed before they are categorized. Make space for the full story before trying to extract themes from it.

Numbers and scores tell you *what* but rarely *why*. Use them as a starting point for conversation, not a conclusion.

Images and creative work often carry meaning that words can't fully capture. Invite people to respond to them – what do they see, feel, notice – before moving to interpretation.



Observations and field notes are already partly interpreted by the person who wrote them. Name that, and invite others to add their own readings.

Across all of these, the goal is the same: bringing people together to ask honest questions and make meaning collectively.

Exercise 4.1: Planning Your Analysis Process

Take some time to map out how you'll approach the analysis. This doesn't need to be elaborate. It's simply a way of making intentional decisions about how you'll make sense of what you find, and who will be part of that process.

Use the table below to sketch your analysis plan.

Data I'm Gathering *Carry these forward from the methods you chose in Section 3*	How I'll Make Sense of It	Who Will be Involved in Analysis	When this Will Happen

Once you've filled in the table, reflect on the following questions:

1. Where are peers most involved in the analysis process? Where are they less involved – and is that a gap worth addressing?
2. What conditions do you need to create for your sensemaking sessions to go well? (Think about time, space, trust, and facilitation.)
3. What will you do if the data surfaces something difficult, unexpected, or hard to act on?
4. Who needs to be part of the conversation when you interpret your findings – and who might be missing from the table above?

Looking Ahead: From Sensemaking to Sharing

You've gathered data in ways that centre peer perspectives. You've made sense of it together. The next question is: what do you do with what you've learned?

Section 5 turns to communicating findings – thinking about who needs to hear what you've discovered, how to share it in ways that are accessible and honest, and how to close the loop with the peers and community members whose contributions made this work possible.

Part 5. Communicating Findings

Communication as Accountability, Not Just Reporting

For many organizations, "communicating findings" means one thing: submitting a report to a funder. And while that obligation is real and important, peer-led evaluation asks you to think beyond it.

When peers, community members, and frontline workers contribute their stories, perspectives, and time to an evaluation process, they become stakeholders in what you've learned. They deserve to hear what their contributions shaped. Sharing findings with the people who made them possible is not an add-on – it is an act of relational accountability, and one of the clearest expressions of the peer-led values that have guided you through this toolkit.

This section will help you think through the full range of people who need to hear what you've discovered, what each of them needs to know, and how to communicate in ways that are honest, accessible, and worthy of the community that contributed to this work.

Who Needs to Hear What You Learned?

Different audiences need different things from your findings. A funder needs evidence of outcomes and accountability for resources. A peer who shared their story needs to know it mattered and what it contributed to. Staff need findings they can act on. A partner organization may need enough context to understand what your work reveals about shared challenges.

Before you decide how to communicate, it is important to take stock of who your audiences actually are. Most organizations will have at least two distinct groups:

- **Formal reporting audiences** – funders, City bodies, accountability frameworks – who have specific requirements about what is reported, in what format, and by when. These requirements are often fixed, and meeting them is non-negotiable.

Relational audiences – peers, community members, staff, partner organizations, and others who contributed to or were affected by the evaluation – who deserve to hear findings in ways that are meaningful and accessible to them, even when there's no formal requirement to share.

The tension between these two groups is real. Funder reports tend to be structured around predetermined outcomes, written in formal language, and oriented toward accountability upward. Relational communication tends to be more open, more story-led, and oriented for accountability to the community. Both matter. The goal is not to choose between them but to plan intentionally for both.

Closing the Loop with Peers

In peer-led evaluation, closing the loop with the people who contributed is not optional – it is part of the process. When peers share stories, sit in circles, create body maps, or take part in interviews, they are making a contribution based on an implicit trust that their input will matter. Following through on that trust means letting them know what you found, what you're doing with it, and how their contribution shaped what you now understand.

But closing the loop is not just about sharing findings back to peers – it's also about inviting peers into the sharing.

Just as peers helped shape the evaluation questions, contributed data, and participated in sensemaking, they can also be active communicators of what the evaluation produced. This is one of the most powerful expressions of peer-led evaluation: when the people whose lives and experiences generated the findings are also the ones who get to say what those findings mean and share them with the world.

In practice, this might look like:

- Peers co-presenting findings at a community event or funder meeting – in their own words, not just as quoted voices in a report
- Peers helping decide what gets shared, with whom, and in what format – bringing their knowledge of community context to communications decisions
- Written summaries or reports that centre peer language and framing, reviewed and shaped by peers before they go out
- A follow-up circle where themes from the data are brought back to participants for collective reflection – and where peers lead the conversation
- Peer evaluators debriefing with the broader group about what the process produced and what they think it means

What matters is that peers are positioned as co-communicators, not just as subjects of communication. There is a meaningful difference between a report that quotes a peer and a report that a peer helped write. There is a meaningful difference between presenting findings about a community and presenting findings with them. Where you can move toward the latter, do.

Closing the loop also doesn't have to be elaborate. A short community gathering, a one-page visual summary shared with participants, or a direct conversation with peer evaluators can be enough – as long as it happens in a spirit of genuine reciprocity, not just notification.

Principles for Communicating Findings

However you share your findings, a few principles can guide how you approach it:

Use language that reflects the people who contributed it. If peers used particular words or phrases to describe their experience, carry that language into how you communicate findings. It signals that their voice shaped the work, not just the data.

Let stories lead where possible. Numbers and themes are useful, but a well-chosen story can communicate something that a summary statistic cannot. Where you have compelling stories – and have consent to share them – let them carry the weight.

Be honest about what you didn't find. Findings that are incomplete, inconclusive, or uncomfortable are still findings. Communicating honestly about uncertainty or gaps builds more credibility than presenting a tidier picture than the data supports.

Match the format to the audience. A written report works for a funder. It may not work for a peer who contributed to the process. Think about what format will actually be read, understood, and useful for each audience.

Share in settings that feel accessible. Where possible, share findings in settings that feel safe and familiar to the people you're communicating with – a community space, a circle, an informal gathering – rather than defaulting to formal presentations.

Close every loop you open. If someone contributed to this process, they should hear something back from it. This is a commitment worth making before you begin gathering data, not after.



Formats and Approaches

There is no single right way to communicate findings. Here are some formats worth considering, depending on your audience and context:

Written reports are typically required for formal funder reporting. They work well for communicating structured outcomes data and accountability evidence. Keep them as clear and jargon-free as possible even when the format is fixed.

Visual summaries or infographics distill key findings into a one-page format that is accessible to a wider audience. Useful for sharing with community members, partners, or at public events.

Community presentations or sharing events bring findings to life in a relational setting. These work especially well when you want to invite conversation and collective reflection on what the findings mean, rather than simply presenting conclusions.

Storytelling showcases centre the stories and voices gathered through the evaluation – particularly powerful when methods like photovoice, digital storytelling, or MSC have been used. These events can be deeply meaningful for participants and compelling for external audiences.

One-pagers for partners distill findings into a brief, focused summary tailored to what a specific partner or stakeholder group needs to know.

Internal team reflections bring findings back to staff and volunteers in a format that supports learning and organizational development, rather than external accountability.

Many organizations will use more than one format – a formal report for the funder, a visual summary for the community, and a team reflection session for staff. Planning for all of these up front avoids findings sitting in a report that very few people ever read.

Exercise 5.1: Planning Your Communications

Use the table below to map out your communications plan. Work through each audience – starting with your formal reporting requirements, then expanding to your relational audiences.

Audience	What They Need to Know	Format

Once you've filled in the table, reflect on the following questions:

- Have you included peers and community members as a distinct audience – not just as subjects of reporting, but as people who deserve to hear findings directly?
- Are there audiences you've left off the table because there's no formal requirement to report to them? Should any of them be added?
- What would it look like to share findings in a way that invites response and conversation, rather than simply delivering conclusions?
- Where does your formal reporting obligation sit in tension with your relational accountability? How will you navigate that tension?
- Is there anything in your findings that is difficult to share – with funders, with peers, or with your own team? What would it mean to share it honestly?

Looking Ahead: Closing the Toolkit

You've now moved through the full arc of peer-led evaluation – from identifying outcomes and indicators, through gathering data with peers, making sense of what you found, and sharing it with the people who need to hear it.

The final section brings the toolkit to a close – reflecting on the journey you've taken and what it means to carry this work forward.

Conclusion: Carrying this Work Forward

You've Done Something Meaningful

Working through this toolkit was not a small thing. You've engaged with ideas that challenge some deeply held assumptions about how evaluation works and who it's for. You've thought carefully about the people your organization serves, what matters to them, and how to bring their perspectives into a process that too often leaves them out. That takes courage, curiosity, and genuine commitment to doing this work differently.

This Is a Beginning, Not a Destination

Completing this toolkit doesn't mean you've arrived. Peer-led evaluation is not a checklist you finish – it's a posture you keep returning to, refining, and deepening over time. What this toolkit has given you is a foundation to build on. Some things will work beautifully. Others will teach you something through not working. Both are valuable.

The invitation is not to get it perfect – it's to stay curious, stay humble, and keep asking the questions that matter. And remember: you don't have to do this alone.

Seek out your critical companions, share your learnings generously, and lean on the community of organizations doing this work alongside you.

The Work Continues

Every time you bring a peer into the evaluation process, every time you let a story carry the weight of a finding, every time you ask "whose voice is missing here?" – you are contributing to a broader shift in how communities understand and advocate for their own wellbeing. That work is slow, relational, and sometimes uncomfortable. And it is exactly the kind of work the world needs more of.

Thank you for taking it on.

Exercise 6.1: A Final Reflection

Below are a set of reflection questions. Read through them and choose the one that resonates most with where you are right now. There's no right answer – just the one that feels most alive for you at this moment.

- *Who in your community has been waiting to have their voice shape this kind of work – and what would it take to invite them in?*
- *What is one assumption your organization holds about evaluation that this toolkit has made you want to question?*
- *Where in your organization's current evaluation practice is there the most room to shift power toward the people you serve?*
- *What is the smallest meaningful step you could take this week to move your evaluation practice in a more peer-led direction?*
- *What will help you stay committed to this work when it gets hard or complicated?*
- *Who in your organization or network could be a critical companion for this work – and have you told them that yet?*

Take a few minutes to write down your response. Share it with a colleague if you can. Making that commitment visible – even in a small way – is the first step in carrying it forward.

Appendix A: Engagement Method Guides

The following guides are designed to help you engage stakeholders in identifying outcomes that matter to them. Each method can be adapted to suit your organizational context, available resources, and the needs of the people you are engaging. You don't need to be a trained facilitator to use these tools – what matters most is approaching the process with curiosity, care, and a genuine openness to what you might hear.

A1. World Café

What It Is

A World Café is a structured conversation method designed to help groups of people explore questions together in a relaxed, informal setting. Inspired by the atmosphere of a café, participants move between small tables in rounds, building on each other's ideas as they go. It works particularly well when you want to engage a larger group – anywhere from 12 to 50 or more people – and generate rich, collective insight on a set of questions in a relatively short amount of time.

In the context of peer-led evaluation, a World Café can be a powerful way to bring peers, frontline workers, and community members together to explore what outcomes matter most to them and what success looks like from their perspective.

What You'll Need

- A comfortable space with small round tables seating 4–5 people each
- Paper tablecloths or large sheets of paper on each table (so participants can write and draw directly on them)
- Markers or pens at each table
- A set of 2–4 open-ended questions, one per table or one per round
- A designated host at each table (this can be a staff member or a peer who is comfortable holding space for conversation)
- A brief time to welcome participants and explain the process before you begin

How to Do It

Before the session: Prepare your questions in advance. These should be open-ended, generative, and directly connected to what you want to learn. For outcome identification, examples might include:

- What does "things getting better" look or feel like for you or the people you care about?
- What changes have you noticed – or hoped to notice – as a result of this program or service?

- What's something important about this work that you don't think gets talked about enough?

Write one question visibly on each table, either on a card or directly on the paper tablecloth.

During the session:

1. Welcome participants warmly and explain that this is a conversation, not a test – there are no right or wrong answers and every perspective matters.
2. Invite participants to sit at any table they like and introduce themselves to their tablemates.
3. Begin Round 1. Allow 15–20 minutes for conversation at each table. Encourage participants to write, draw, or doodle their ideas directly on the table paper as they talk.
4. At the end of the round, ask participants to move to a different table – mixing up the groups so that new combinations of people come together. One person can remain at each table as a "table host" to briefly share what was discussed in the previous round.
5. Repeat for 2–3 rounds, or until you feel the conversations have been rich enough to capture what you need.
6. Close with a brief whole-group harvest – invite a few participants to share one insight or theme that stood out to them from their conversations. You might also do a visual harvest by asking the group to look across all the tables together and notice what themes or patterns emerge.

After the session: Photograph the table papers before people leave. Review the notes and images afterward to identify recurring themes, unexpected outcomes, and insights that should be added to your outcomes table.

A2. Arts-Based Methods

What It Is

Arts-based methods use creative processes – drawing, collage, painting, mapping, photography, and more – as a way of generating and capturing knowledge that words alone sometimes can't reach. They invite people to express their experiences, hopes, and perspectives through image, symbol, colour, and story, opening up ways of knowing that traditional data collection methods often miss.

In the context of peer-led evaluation, arts-based methods are particularly powerful because they can surface emotional, embodied, and relational dimensions of experience that matter deeply to people but rarely show up in surveys or reporting frameworks. They also tend to lower the barriers to participation – not everyone feels comfortable speaking in a group or answering formal questions, but many people find creative activity engaging and accessible.

Arts-based methods can be used in a group setting, such as a community mural session, or in a more individual, one-on-one format. Both approaches are described below.

It's worth naming that you don't need to be an artist to facilitate arts-based methods, and participants don't need any artistic skill or experience. The process is what matters, not the product. What you're looking for is not aesthetic quality but honest expression – the colours, images, and symbols people reach for when they try to show you what their experience feels, looks, or sounds like.

What You'll Need

For a group session:

- A welcoming, spacious room where people can move around comfortably
- Large paper or canvas for a collaborative mural, or individual sheets for personal work
- A variety of accessible art materials: markers, paint, collage materials (magazines, scissors, glue), pastels, coloured pencils
- Prompts or questions written on cards that participants can refer to as they work
- Time built in for sharing and reflection after the creative process

For individual sessions:

- A quiet, private space where the participant feels at ease
- A selection of art materials – offer variety but don't overwhelm; a set of markers or pastels and some collage materials is usually enough
- A simple set of 2–4 prompts to guide the creative exploration
- A way to capture the conversation that happens around the artwork – notes or a voice recording with consent

How to Do it

Group Format: Community Mural or Collective Image-Making

A community mural session brings a group of peers together to collaboratively create a visual representation of their shared experiences, hopes, and definition of success. The process of making the mural together – negotiating what goes on it, noticing what images different

people reach for, and hearing the stories behind each contribution – is just as valuable as the finished piece.

Before the session: Prepare your space so it feels welcoming and creative rather than clinical or formal. Lay out materials in an accessible, inviting way. Think carefully about your prompts – they should be open enough to allow genuine expression but focused enough to generate insight relevant to your evaluation. Examples might include:

- *Draw or collage what your life looked like before you connected with this program or service – and what it looks like now.*
- *Create an image of what "feeling supported" looks or feels like to you.*
- *What does a healthy, connected community look like? Show us in images.*
- *What does success look like for you? What would tell you that things are going really well?*

During the session:

1. Welcome participants warmly and take time to settle in together before introducing any creative activity. Share food if you can – it goes a long way toward creating a relaxed atmosphere.
2. Introduce the activity by explaining its purpose in plain language: you are trying to understand what matters most to the people you serve, and you believe creative expression can help surface things that words sometimes can't.
3. Reassure participants that there is no right or wrong way to engage – any mark, image, or colour they feel drawn to is valid. If someone feels stuck, encourage them to simply choose a colour that represents how they feel right now and start there.
4. Invite participants to begin working, either on a shared surface or on individual pieces that will come together as a collective work. Play quiet background music if it helps create a comfortable atmosphere.
5. Move gently around the room as people work, showing genuine curiosity about what you see. Ask open questions: "Can you tell me a little about what you're creating?" or "What does this colour or image represent for you?" Take brief notes on what people share – these conversations are often where the richest insights live.
6. Once people have finished creating, bring the group together to share. Invite anyone who wants to briefly describe their contribution and what it means to them. Notice what themes, images, or symbols appear across multiple people's work.
7. Close with gratitude and – if possible – find a way to honour the work that was created, whether that's displaying the mural in your

space, photographing it to share back with participants, or simply naming aloud what it revealed.

After the session: Photograph all artwork and review your notes. Look for recurring images, symbols, or themes. What outcomes do they point to? What do people seem to value, fear, hope for, or need that might not be captured in your current outcomes table? Add relevant insights to your table.

Individual Format: One-on-One Arts-Based Exploration

A one-on-one arts-based session pairs a facilitator with a single participant in a supported creative conversation. This format works particularly well for people who may not be comfortable in groups, who have had complex or difficult experiences they want to express privately, or who simply prefer a quieter, more intimate setting.

The role of the facilitator in this format is not to direct the creative process but to hold space for it – to sit alongside the participant with genuine curiosity and openness, and to invite them to share what their creative choices mean to them.

Before the session: Reach out to the participant in advance and let them know what to expect – a relaxed, informal creative session with no artistic skill required. Confirm consent around how their artwork and the conversation will be used and stored.

Prepare a small selection of accessible materials and 2–4 simple prompts. You don't need many – less is often more in a one-on-one setting.

During the session:

1. Begin by settling in together. Offer the participant time to look through the materials and choose what feels inviting before you introduce any prompts.
2. Share the prompts gently, framing them as starting points rather than instructions. Let the participant choose which prompt resonates most, or invite them to set the prompt aside entirely and simply create something that feels true to their experience.
3. Sit with the participant as they work. Be comfortable with silence – creative processes need breathing room. Avoid rushing or filling quiet moments with words.
4. When the participant feels they are finished, invite them to share: "Can you tell me about what you made?" or "Is there anything in this piece you'd like me to understand?" Follow their lead in how much they want to share.
5. You might also ask more evaluative questions at this stage, gently and with care: "Is there anything in this piece that connects to how this program or service has affected your life?" or "If you were going to point to the most important thing in this image, what would it be and why?"

6. Close warmly and ask if there is anything else they'd like to share before you finish. Thank them sincerely.

After the session: With the participant's consent, photograph or keep their artwork. Review your notes and consider what outcomes or themes the session surfaced. Add relevant insights to your outcomes table.

A Note on Consent and Care

Arts-based methods can sometimes open doors to experiences and emotions that participants weren't expecting to access. This is part of what makes them valuable – but it also means that facilitators need to approach these sessions with particular care and attentiveness.

Before any arts-based session, make sure participants understand what the session involves, how their work will be used, and that they are free to stop or step back at any time. Have a plan for how you will respond if someone becomes distressed, and make sure participants know what supports are available to them. When in doubt, consult with someone in your organization who has experience in trauma-informed practice before facilitating these sessions.

A3. Interviews

What It Is

An interview is a one-on-one conversation between a facilitator and a participant, guided by a set of open-ended questions. Interviews are particularly valuable when you want to understand individual experiences in depth – when you want to hear someone's story, not just their opinion. They create space for nuance, emotion, and detail that group settings sometimes don't allow.

In the context of peer-led evaluation, interviews can be used to understand what outcomes matter most to individual service users, frontline workers, or community members, and to hear in their own words what change looks and feels like from their perspective.

Interviews don't need to be long or formal. Even a 20–30 minute conversation can yield rich and meaningful insights.

What You'll Need

- A quiet, private space where the participant feels comfortable
- A set of 5–8 open-ended questions prepared in advance
- A way to capture responses – written notes, or a voice recording if the participant consents

- A simple consent process to explain how their responses will be used and to confirm they are comfortable participating

How to Do It

Before the interview: Reach out to potential participants in advance and explain what the conversation is for, how long it will take, and how their input will be used. Make it clear that participation is voluntary and that there are no right or wrong answers.

Prepare your questions in advance but think of them as a guide rather than a script – you want to follow the conversation where it goes, not move rigidly from question to question.

During the interview:

1. Begin by thanking the participant for their time and briefly explaining the purpose of the conversation in plain language. For example: "We're trying to make sure our evaluation reflects what actually matters to the people we work with – so we really want to hear your perspective."
2. Confirm consent and let them know how you'll be taking notes or recording.
3. Start with a warm, easy opening question to help them feel comfortable before moving into deeper territory.
4. Use your prepared questions as anchors, but follow up on things that feel important or interesting. Some of the most valuable insights come from following a thread you didn't anticipate.
5. Leave space for silence. Participants sometimes need a moment to think, and that's okay.
6. Close by asking if there's anything they'd like to add that you haven't covered, and thank them sincerely for their time.

After the interview: Review your notes as soon as possible while the conversation is fresh. Highlight key themes, quotes, or outcomes that were named – especially anything that surprised you or that you haven't heard before. Add relevant outcomes to your table.

Suggested Questions

The following questions can be adapted depending on who you are speaking with:

- Can you tell me a little about your experience with [program/service/organization]?
- What does a good day look like for you in the context of this work?
- What has changed for you – or for the people you work with – as a result of this program or service?
- What does "success" look like to you? How would you know if things were going really well?



- What's something important about this work that you don't think gets captured in formal reports or evaluations?
- Is there anything that matters deeply to you that you feel is often overlooked or not talked about?
- If you could change one thing about how this program or service measures its impact, what would it be?

A4. Focus Groups

What It Is

A focus group is a facilitated group conversation, typically involving 5–10 participants, that uses open-ended questions to explore a topic in depth. Unlike a World Café – which moves participants through multiple tables and questions – a focus group stays together as one group throughout the conversation, allowing participants to build on, challenge, and deepen each other's ideas.

Focus groups work well when you want to understand not just what people think, but how they think together – how ideas and perspectives interact, where there is shared experience, and where there is difference or tension.

In the context of peer-led evaluation, a focus group can help you understand what a specific group of stakeholders – for example, service users, or a team of frontline workers – collectively see as the most important outcomes of your work.

What You'll Need

- A comfortable space where participants can sit in a circle or around a table and see each other
- 5–10 participants with relevant shared experience
- A facilitator to guide the conversation
- A note-taker (separate from the facilitator if possible, so the facilitator can stay present in the conversation)
- A set of 5–7 open-ended questions
- A simple consent process

How to Do it

Before the focus group: Recruit participants who share a relevant connection to your program or work – for example, current or recent service users, a group of frontline staff, or community members with lived experience of the issues your work addresses. Aim for a group that feels comfortable enough to speak candidly together.

Prepare your questions in advance, ordering them from broader and more comfortable to more specific or reflective. Plan for the conversation to take 60–90 minutes.

During the focus group:

1. Welcome participants and create a warm, relaxed atmosphere. If possible, offer refreshments and allow a few minutes of informal conversation before you begin.
2. Introduce yourself and the note-taker, and explain the purpose of the conversation in plain language. Emphasize that you are there to listen and learn – not to evaluate the participants themselves.
3. Establish group agreements together at the start. These might include things like: listen to understand, not to respond; what's shared here stays here; there are no right or wrong answers; it's okay to disagree respectfully. Inviting participants to add their own agreements builds trust and shared ownership of the space.
4. Begin with a warm-up question that is easy and inviting – something that gets everyone talking without requiring vulnerability right away.
5. Move through your questions at a relaxed pace, leaving room for the conversation to develop organically. Your job as facilitator is to keep the conversation focused and ensure everyone has space to contribute – not to move rigidly through the questions.
6. If the conversation stalls, try reflecting back what you've heard: "I'm hearing that [X] feels really important to a few of you – does that resonate with others in the group?"
7. Close by thanking participants warmly and asking if there's anything important that didn't come up that they'd like to name before you finish.

After the focus group: Review notes with your note-taker as soon as possible. Identify key themes, recurring ideas, and any outcomes that were named that aren't yet in your table. Pay particular attention to outcomes that multiple participants mentioned independently, as well as anything that seemed to generate strong emotion or energy in the room.

Suggested Questions

The following questions can be adapted depending on your context and the group you are engaging:

- To start: Can you share a moment from your experience with [program/service] that has stayed with you?
- What do you think this program or service does really well?
- What kinds of changes have you seen or experienced as a result of this work – in yourself, in others, or in the community?
- When you imagine this work going really well, what does that look like? What's different?
- What's something that matters a lot to you or the people you know that you feel doesn't get talked about or measured in formal evaluations?

- If you were going to tell someone else whether this program was worth their time, what would you say?
- Is there anything you wish the people running this program understood better about your experience or needs?



Strategy for
Community
Mental Health