Making Change Visible

Evaluating Efforts to Advance Social Participation in Health

Facilitator's Guide for the Implementer's Resource

Training and Research Support Centre
TARSC

shaping health

With support from the Robert Wood Johnson Foundation
Global Fund at Charities Aid Foundation America

This Facilitator's Guide was developed and authored by a team of people with professional experience in implementing and evaluating social participation in health in different countries globally. Their names and primary organisational affiliations are: Rene Loewenson (project lead), Training and Research Support Centre (TARSC); Sarah Simpson, EquiAct; Ruth Dudding, Athens City County Health Department; Francisco Obando, independent consultant, and Peter Beznec, Center for Health and Development Murska Sobota. We acknowledge and are grateful for the editorial support provided by Teri Larson, editorial consultant.

This short guide complements the Making Change Visible (MCV) Implementer's Resource. Its purpose is to make it easier for you to use the Resource with your colleagues or others interested in learning about evaluation— specifically, evaluation of interventions that promote or expand social participation in health (SPH). This is the second version of the Facilitator's Guide, taking into account feedback from experience of using the Resource and Guide in different settings.

Acknowledgements
The project team gratefully thanks the peer reviewers: Josie Williams, Roberta Delgado, Matt Leighninger, Kari Boyle, Megan Buskirk, Sherri Lynne Oliver, Megan Inada, Bill Wagner, Roberta Waite, Barbara Kaim, Pia Vracko, Renee Hodin, and Susan Mende. We also thank those who participated in pilot sessions using the Resource and have given us valuable feedback to improve this Guide.

Thank you to our colleagues at the Robert Wood Johnson Foundation Global Ideas Fund at Charities Aid Foundation America (CAFA) for their financial support. The views expressed herein are those of the authors and do not necessarily reflect the views of the RWJF and CAFA.

Cite as: Loewenson R, Simpson S, Dudding R, Obando F, Beznec P (2022) Making Change Visible: Evaluating Efforts to Advance Social Participation in Health, Facilitator's Guide to the Implementer's Resource, TARSC

Co-ordinated and produced by Training and Research Support Centre (TARSC), 2022

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1: Introduction

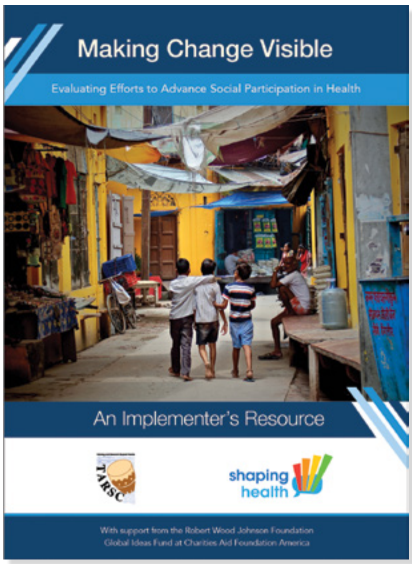
This short guide complements the *Making Change Visible (MCV) Implementer's Resource*. Its purpose is to make it easier for you to use the Resource with your colleagues or others interested in learning about evaluation—specifically, evaluation of interventions that promote or expand social participation in health (SPH). This guide walks you through three different approaches to evaluation training workshops/skills sessions that vary based on the amount of time and level of instruction needed. They are:

1. **A three-hour overview session to outline what the Resource provides.**
2. **A three-day workshop on how to use the Resource with people who are likely to design or support an evaluation of SPH.**
3. **A real-time coaching effort in which training sessions using the Resource are integrated into the actual team process of designing and implementing an evaluation for an SPH intervention.**

You should use the Resource in the ways and settings that work best for you, your colleagues, and potential participants. The guide is there to help and suggest, not to prescribe. We have suggested three different session types above, but you could organise the time differently. You may choose, for example, to hold two 90-minute sessions, with time in between to use the Resource. Or, perhaps you'll be at a conference and you only have an hour. You won't have time for a hands-on activity, but you could introduce the Resource and its contents, provide examples from it, give your own, or ask a colleague to provide brief examples at relevant points. The links to practice help to make it more real for participants and are good points to break for discussion if time permits. You will find a PowerPoint slide deck on the Shaping Health website or by emailing admin@tarsc.org that you can use as is, or modify as needed. We ask only that you retain the source credits on the slides you use, including the Shaping Health logo. The slide set and presentation can help you structure your inputs, including when to break for stories, practical examples, and interactive activities. The slide set includes real examples that you can use in guiding participants through relevant parts of the Resource. These examples are being regularly updated and we welcome inputs from your own sessions.

This guide provides suggestions, not prescriptions, on the following:

- Using the Resource, worksheets, and sample schedules for the three different evaluation training approaches;
- Preparing for and facilitating evaluation training workshops/skills sessions; and
- Gathering feedback on sessions from participants, and an evaluation form for facilitators to provide feedback on their use of the Resource.



The Resource is available for download from the Shaping Health site. There are also limited hardcopies available. The electronic version's interactive elements are very useful, while having a hardcopy to refer to may make it more accessible for some. You can demonstrate the electronic copy's interactive features in session, such as by using tabs to flip between sections and links to go back and forth to worksheets or resources. You can do this by using the pdf of the Resource in your presentation (you do not need to be online). When doing the sessions online give yourself more time for interactive elements and participant inputs.

2: Three approaches to evaluation training

This guide introduces three sample approaches to evaluation training using the MCV Implementer's Resource. The boxes below describe in broad terms the content that could be covered in each approach. Note that each is coded with its own colour—blue, yellow, or green—to help you quickly distinguish among them throughout the guide.

1. THREE-HOUR OVERVIEW of the Resource

This approach introduces the MCV Implementer's Resource and walks participants through how it can be used to provide an overview of evaluation during a workshop, meeting, or conference. It answers the following questions:

- Why should we evaluate SPH interventions?
- Who is the audience for the Resource, what topics does it cover, and how it can be used in an evaluation?
- What challenges may arise during an evaluation and how can they be overcome?
- Where can I find further information if I would like to use the Resource in my own training activities?

2. THREE-DAY WORKSHOP to build evaluation skills using the Resource

This three-day interactive workshop targets people who are involved with SPH interventions, have some basic knowledge of evaluation, and may want to use the Resource with their own colleagues or help others to use it. This workshop moves through the Resource from start to finish, draws on examples and participant inputs, uses some of the worksheets, and asks participants to prepare for each day by reading parts of the Resource at home. It covers the following topic areas:

- Introducing evaluation and why it is important for SPH interventions
- Developing a theory of change, designing and implementing a baseline assessment, and addressing ethical issues in evaluations
- Designing, implementing, reviewing, and presenting findings from a performance evaluation and an outcome or impact evaluation—and addressing challenges encountered
- Further resources and options for evaluating the three-day workshop

3. REAL-TIME COACHING using the MCV Implementer's Resource to support a team through the full process of evaluating an SPH intervention

This type of training supports use of the Resource within an evaluation process over time. It is implemented as half- or full-day sessions that are scheduled as needed during an SPH intervention in which facilitators work with and as part of a team to design and implement a "real world" evaluation. The iterative sessions move sequentially through parts 1 to 5 of the Resource and use all the worksheets systematically to cover the following:

- Introducing the Resource and setting up the purpose, expectations, process, objectives of, and plans for an SPH evaluation
- Introducing the different types of evaluation and ethical issues that must be addressed
- Developing the theory of change for the SPH intervention and/or using it to design, implement, and analyse the findings of a baseline assessment; and discussing how to resolve challenges
- Planning, implementing, and analysing one or more performance evaluations during the SPH intervention, including how to organise and use the findings
- Planning, implementing, and analysing findings from an outcome or impact evaluation of the SPH intervention, including how to organise and report the findings for different audiences
- Reflecting on the lessons learned from implementing the evaluation and using the Resource, sharing further resources, and identifying next steps.

Sample schedules for three approaches to evaluation training

These sample schedules are guidelines, outlining the content with some suggestions on the process for each evaluation approach. You are encouraged to customize the timing, content covered, and facilitation of each based on your own preferences and experiences and on the needs of your participants.

SAMPLE SCHEDULE FOR A THREE-HOUR OVERVIEW SESSION

SESSION TOPIC	CONTENT AND PROCESS	TIMING
Workshop purpose, process, expectations, and objectives	Introduce the host and facilitator(s), who give welcome remarks and explain workshop agenda and objectives; facilitate participant introductions and a discussion of their expectations for the session.	20 minutes
Why SPH interventions should be evaluated; provide an example (or more) from practice	Go over the definition of SPH, different purposes and interests in evaluating SPH interventions, and a real-world evaluation story (could be one from the Resource or perhaps one shared by a participant). Pivot from the story to introduce and provide an overview of the three different stages of evaluation.	40 minutes
The MCV Implementer's Resource	Introduce the Resource, including: its purpose, target audiences, structure, and primary contents (measures, methods, worksheets, etc.)—be sure to use specific examples from the Resource.	20 minutes
BREAK (15 minutes)		
How the Resource can be used in an evaluation	Group process on how to use the Resource. Some examples: • Pose specific questions and direct participants to the Resource for answers. • Break into three groups, with each group reviewing part 2, 3, or 4 of the Resource. • Complete a different worksheet in each group, with participants searching the Resource for supporting content. Review group feedback and outline ways of using the Resource.	45 minutes
Don't let the perfect be the enemy of the good: Challenges and how to overcome them	Facilitate a quick brainstorming session on evaluation challenges. Provide an overview of issues and challenges covered in the Resource, as found, for example, on pages 1.8-9; 2.22; 3.13; and 4.18. Encourage participants to start simple, do what is possible, do not overload, and learn from doing.	20 minutes
Next steps and wrap up	Provide an overview of additional evaluation resources available, as provided in Part 5 of the Resource. Preview a possible three-day workshop using the Resource. Ask participants for feedback on the session. Final questions and closing.	20 minutes

SAMPLE SCHEDULE FOR A THREE-DAY WORKSHOP

SESSION TOPIC	CONTENT AND PROCESS	TIMING
DAY 1 Introductions. Provide an overview of the MCV Implementer's Resource, evaluation of SPH, a theory of change and ethics		
Workshop purpose, process, expectations, and objectives.	Introduce the host and facilitator(s), who give welcome remarks and explain workshop agenda and objectives; facilitate participant introductions and a discussion of their expectations for the session. Explain that participants will need to read parts of the Resource on their own time to prepare for the next day. Provide a workshop programme. Explain workshop rules, such as: take space, make space; all questions welcome; parking lot for side questions; don't interrupt people speaking; don't dominate; be respectful; etc.	Morning 30 minutes
Why SPH interventions should be evaluated; provide one or more example(s) from practice	Go over the definition of SPH, different purposes and interests in evaluating SPH interventions, and a real-world evaluation story (could be one from the Resource or perhaps one shared by a participant). Pivot from the story to introduce and provide an overview of the three different stages of evaluation. Complete Worksheet 1.1 in groups, discuss in plenary. Discuss the myths that stop people from doing evaluations (MCV Resource Part 1).	Morning 2 hours
The MCV Implementer's Resource	Introduce the Resource, including: its purpose, target audiences, structure, and primary contents (measures, methods, worksheets, and ways of tackling challenges). Be sure to use specific examples from the Resource. Facilitate a group activity on different ways to use the Resource, and discuss in plenary.	Morning 1 hour
MCV Resource Part 2: Developing a theory of change	Introduction to planning an SPH intervention and the theory of change that informs it. Group work using Worksheet 2.1 and one real participant experience in each group. Each group explores the questions and collectively develops the theory of change and discusses in plenary. Show the links between a theory of change and the three evaluation stages.	Afternoon 2 hours
MCV Resource Part 1: Ethics in an evaluation	Review the evaluation ethics discussion in Part 1 of the MCV Resource. With participants in groups of 2-3 people (also called 'buzz groups'), brainstorm on ethical issues participants have faced or are aware of. Listen to the issues raised in plenary and discuss issues faced.	Afternoon 40 minutes

SESSION TOPIC	CONTENT AND PROCESS	TIMING
	Provoke group discussion on: • Respect for all, including cultural sensitivity, diversity, power dynamics, and conflict resolution; • Inclusion, such as need to involve as many people as possible given different language skills and experiences; and • Consensus, including building it around analysis and learning. Discussion and summary of MCV Resource Part 1. Use the smiley face ranking tool from Worksheet 1.2 to gauge participants' feelings about the day, including the accessibility of the information presented. Each participant offers a take-home message from Day 1. Introduce Part 2 reading assignment for Day 2 and ask participants to read Part 1 to recap what was discussed in the day.	
DAY 2 Introduce evaluation measures and methods and their use in a baseline evaluation		
MCV Resource Part 2: Introduction to implementing a baseline assessment-introduction	Introduce participants to a baseline assessment (drawing from Part 2 of the Resource). What is a baseline and why is it needed? Identify the three key elements of a baseline assessment: • What to measure/gather as evidence • How to collect the information and from whom/where • How to organise and report it Point out to participants that they need to think ahead about what measures will need to be repeated to track changes in performance and outcomes, to include these measures in the baseline. Activity: Ask participants to recount their experiences with baseline assessments.	Morning 40 minutes
MCV Resource Part 2: Measures of change in a baseline assessment	How to perform a baseline assessment (drawing on MCV Part 2): Identify the five key areas of information needed. Using the SPH intervention and theory of change from Day 1, have groups work through Worksheet 2.2a and 2.2b and identify the measures for the five categories (as relevant). Plenary discussion: How to choose which measures are most relevant (MCV Part 2). You can do a participatory exercise. For example, after compiling a list of measures, participants can put stars on a flip chart list for those that they see as the most relevant and the outcome can be discussed in plenary. Plenary discussion: Sources of evidence, who to cover, equity and diversity	Morning 2 hours

SESSION TOPIC	CONTENT AND PROCESS	TIMING
MCV Resource Part 2: Implementing a baseline assessment—methods	Introduce participants to baseline assessment methods. For this and subsequent discussions, make an enlarged visual (chart or slide) of the Methods Table from MCV Part 2 to which you can refer. Participants may need time to read through the methods again. Activity: Toolbox gallery walk (post answers on large pieces of paper around the room—or virtual equivalent) 1. What methods have you used before? 2. Which methods would be easiest/most feasible to implement? 3. Which methods would be more participatory? Discuss which methods to use for the five different areas of evidence, taking responses to questions #1-3 above into account. Engage participants in a question-and-answer discussion on methods.	Morning 30 minutes for the introduction Afternoon 2 hours
MCV Resource Part 2: Organizing, analysing, and presenting baseline assessment findings	Presentation to participants on how to organise and present baseline assessment findings (drawing from MCV Part 2). Discuss and draw attention to Worksheet 2.4 on key audiences (Note: discussion on reporting and challenges will occur on Day 3). Introduce Parts 3 and 4 reading assignment. Participants take turns to share their take-home message from Day 2.	Afternoon 40 minutes
DAY 3 Introduce performance and outcome evaluations, discuss challenges and next steps		
MCV Resource Part 3: Implementing a performance evaluation	Introduce performance evaluations, including the general steps involved (drawing on MCV Part 3). Identify the key categories of information for a performance evaluation. Buzz group activity: Participants' experiences with performance evaluations • How often did they repeat it? • Who was it for? • How did they use it? Plenary discussion.	Morning 40 minutes
MCV Resource Part 3: Implementing a performance evaluation—methods	Introduce performance evaluation methods, referring to the large visual you made of the Methods Table from MCV Part 2. Participants may need time to read through the methods again. Group activity: Toolbox Walk—referring back to Day 2 summary charts and discussion of baseline methods, identify: 1. Which methods are the same for baseline assessments and performance evaluations? 2. Which methods are different? Why are they different?	Morning 2 hours

SESSION TOPIC	CONTENT AND PROCESS	TIMING
	Refer back to the key areas of evidence discussed/identified on Day 2 (using Part 2). Discuss the methods that can be used to implement a performance evaluation for each of these measures (Group can help fill-in a large, pre-prepared chart). Note the discussion in Part 2 on online methods. Presentation on cost effectiveness and the methods for it. Q&A on methods.	
MCV Resource Part 4: Implementing an outcome evaluation, including measures and methods	Referring to activities done during the previous sessions, develop with participants a story board/plan for an evaluation. The plan should include the following elements: • Stakeholders: who is important? • Theory of change • Baseline assessment measures: where are we starting from? • Performance evaluation measures: how will we know if our strategies are the right ones? Introduce the differences between outcomes and impacts, and present key areas of outcome measures and the methods for them (drawing from MCV Part 4). Introduce and outline the methods for cost benefit and social return on investment as discussed in Part 4. Be sure to distinguish cost benefit from cost effectiveness and discuss what is the same and what is different between the two. Q&A session.	Morning 1 hour Afternoon 20 minutes
MCV Resource Parts 3 and 4: Reviewing findings and addressing challenges	Group activity using Worksheet 3.2 and suggested key audiences for the findings. Discuss different ways to organise and share findings with identified audiences. Present examples from the Resource, such as progress markers, dashboards, and targets for a progress evaluation (Part 3) and an outcome evaluation (Part 4). Participatory exercise on reporting (e.g., Margolis wheel) focused on issues/challenges faced and ideas of ways of solving them.	Afternoon 1 hour

SESSION TOPIC	CONTENT AND PROCESS	TIMING
MCV Resource Parts 3 and 4: Addressing skills and challenges	Group Activity: Market Place (as described in Worksheet 4.2)—using flip charts, each of which features a question on what skills are needed to implement the evaluation. Participants discuss the questions and fill in responses. Flip chart 1: What skills are needed? Flip chart 2: What skills already exist in the team? Discuss skills the team has/needs and how to acquire missing skills (including by making the evaluation less complex!). Participants individually write down challenges on index cards (one challenge per card), and the cards are grouped and discussed in plenary. Summarise for participants the information on challenges in the MCV Resource parts 3 and 4.	Afternoon 1 hour
MCV Resource Part 5: Wrapping up and follow up	Provide an overview of additional resources available, as noted in MCV Part 5. Discuss with participants their thoughts about next steps. Workshop evaluation: If you have developed a written feedback form, ask participants to complete it, and also solicit verbal feedback, asking them to respond to these questions: • What is most useful information learned? • What would they change? • What questions remain? You could, for example, use the 'ballots in the hat' method described in the Organising People's Power for Health toolkit (see Activity 34, page 107). Close	Afternoon 45 minutes

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SAMPLE SCHEDULE FOR REAL-TIME EVALUATION COACHING

The schedule below assumes an SPH intervention implemented in a large area by a team and lasting for several months or longer. For shorter, simpler interventions, you may work more quickly through the Resource and worksheets. The following meetings should be held well before the implementation of a particular phase of the evaluation. The Resource guides you in how to plan and prepare for the evaluation itself at each stage.

SESSION TOPIC	CONTENT AND PROCESS	TIMING
TEAM MEETING 1 to prepare for the evaluation (½ day)		
Purpose, process, expectations, objectives, and meeting schedule	Facilitator and team introductions; welcome remarks; and meeting objectives and process, including the meeting schedule, required reading for homework, and participant introductions and expectations. Explain rules, such as: take space, make space; all questions welcome; parking lot for side questions; don't interrupt people speaking; don't dominate; be respectful; etc.	30 minutes
MCV Resource Part 1: SPH intervention and why it should be evaluated; types of evaluation	The meaning of SPH; different purposes and interests in evaluating the SPH intervention (e.g., buzz groups and discussion on why evaluate). Complete Worksheet 1.1 on stakeholders and discuss Describe the three stages of evaluation, explaining the use of each stage and why each should be done.	1 hour, 30 minutes
MCV Resource Part 1: Consolidating the team and ethical issues	Discuss the evaluation myths in Part 1—do any apply to the team? If so, how can they be overcome? Work with Worksheet 1.2 on the skills needed and skills gaps to fill Introduce the ethical issues in evaluation. Ask the team if any don't apply or if others are missing? Prepare an ethical commitment pledge that all can sign.	1 hour, 30 minutes
The MCV Resource: Why it was written, for whom, and what it contains	Introduction to the MCV Resource: purpose; target audiences; structure; and main contents, including measures, methods, ways of presenting findings and tackling challenges, and worksheets. Highlight specific real-world examples from the Resource, and explain that the team will use the Resource step-by-step. For the next meeting: Summarise what has been discussed and agree on next steps, such as recruiting additional team members to fill skills gaps. Read MCV Resource Part 2 before the next meeting.	30 minutes

SESSION TOPIC	CONTENT AND PROCESS	TIMING
TEAM MEETING 2 to plan the evaluation process and the baseline assessment (1 day)		
MCV Resource Part 2: Developing a theory of change	Introduction to planning an intervention, developing a theory of change, and identifying the three stages of an evaluation (drawing from MCV Part 2). Work with Worksheet 2.1 to identify the theory of change for the SPH intervention (create a large visual to refer to during plenary discussion and for use in future sessions). Link the theory of change to the three evaluation stages. Discuss the time frames for each step in the theory. Use it to prepare a plan for the evaluation (e.g., in a chart with four columns: in column one, put the theory of change step; in column 2, the timing; in column 3, the evaluation stage; and in column 4, when it will be done). For follow up: The facilitator will summarise, on paper or in an email, the theory of change and the SPH intervention and evaluation plan with agreed-upon timings and share with each team member (and management, as relevant).	2 hours
MCV Resource Part 2: Implementing a baseline assessment—measures and indicators to use	Introduce how to do a baseline assessment (MCV Part 2). Review the five key areas of information to be gathered in the baseline and the type of evidence for them (MCV Part 2). Work with Worksheet 2.2a to identify the broad information to collect for the baseline for the SPH intervention and theory of change. Once this is agreed upon, go back and remind participants of specific measures for these areas of information and what to keep in mind when choosing the evidence to collect (MCV Part 2). Work with Worksheet 2.2b to identify the indicators for the information to collect for the baseline for your intervention. Put the chart you develop from Worksheet 2.2b on the wall for all to see and break for refreshments!	2 hours
MCV Resource Part 2: Implementing a baseline—methods	Introduce methods for the different categories of information in a baseline assessment. Draw from the MCV Part 2 Methods Table (refer to a large visual of the table during the session). Note that participants may need time to read through the methods Work with Worksheet 2.3 to identify the methods for the information to be collected as part of your baseline assessment. It may be useful to work in smaller groups, with each group taking different areas of information to apply the methods. Use a plenary presentation and discussion to reach consensus. When discussing the methods, display the charts from Worksheet 2.3 on the wall. Give participants different colours of sticky dots to mark methods that: 1. They have used before, 2. Would be easiest/most feasible to implement and yield good quality evidence, and 3. Would be more suited to the local community involved and ensure that all are reached (equity).	2 hours, 30 minutes

SESSION TOPIC	CONTENT AND PROCESS	TIMING
MCV Resource Part 2: Implementing a baseline—methods, (continued)	Referring to the methods charts with their colour-coded sticky dots, agree as a group on which methods to use for the five different areas of evidence for the baseline. Where the group identifies a method as less feasible, replace it with another. Discuss and agree exactly where the baseline will be done (and why), with whom (and why), and who will implement it. Well done—that's a big step taken! Use the smiley face ranking tool to see how people feel about the work they just completed. **For follow up:** On paper or via email, the facilitator will summarise the baseline assessment, including population covered, indicators, and methods planned, and share with each team member (and management, as relevant), together with agreed upon roles for each team member. The resources and any further training needed on a specific method for those implementing the baseline can be separately arranged. Team members to review Part 2 of the Resource to prepare for next team meeting.	
TEAM MEETING 3 to analyse baseline assessment results and address challenges (< ½ day)		
MCV Resource Part 2: Organising and using findings	Introduce the options for organising, analysing, and reporting the baseline assessment findings. As a team, complete Worksheet 2.4 to identify who will want to know what information from the baseline. Referring to the chart completed as part of Worksheet 2.4, discuss how the team will manage the necessary tasks, including checking the data in the field, cleaning and analysing the data, and preparing and reviewing the draft report. Discuss the different groups/people to whom the findings from the baseline will be presented and why; also discuss who will do the presentation and in what format. **For follow up:** The team will assign a member to summarise the decisions made and add this information to the summary plan for the baseline assessment, with a copy shared with each team member. If outside skills need to be brought in for the analysis, agree who will follow up on this.	1 hour, 30 minutes
MCV Resource Part 2: Planning for implementation and challenges	Use a participatory exercise (such as card sorting) to raise and discuss challenges, including how to address them. Recap and ensure consensus on the full plan for the baseline. Consider what costs might be incurred and how they will be met. Read through the section on 'planning for challenges' of the MCV Resource (in Part 2) for any further information. Summarise what has been discussed and check for consensus	45 minutes

SESSION TOPIC	CONTENT AND PROCESS	TIMING
MCV Resource Part 2: Planning for implementation and challenges (continued)	**For the next meeting:** Identify any remaining challenges and any follow-up actions to carry over to the next meeting. Read Part 3 of the Resource before the next meeting. Implement the baseline. You will need to schedule a separate time to review the results and think about what they mean for the SPH intervention, theory of change, and other stages of the evaluation.	
TEAM MEETING 4 to plan the performance evaluation(s) (< ½ day)		
MCV Resource Part 3: Implementing a performance evaluation—measures	Introduce why and when to do a performance evaluation (MCV Part 3). Introduce the six key areas of information to be gathered in the performance evaluation (MCV Part 3). Work as a team with Worksheet 3.1a to identify the measures/ indicators to collect for the performance evaluation. Have the chart from Worksheet 2.3 available as you may use information from it. Check how you will use the measures to avoid collecting more than you need! Discuss and agree on the final measures and how many rounds of performance evaluation to do. Put the chart you fill from Worksheet 3.1a on the wall for all to see and enjoy a short break!	1 hour, 30 minutes
MCV Resource Part 3: Implementing a performance evaluation—methods	Introduce methods for performance evaluation (drawing from MCV Part 3 and using the methods table as a visual prompt). Work as a team with Worksheet 3.1b to identify methods for the information you want to collect in the performance evaluation. It may be useful to have 2-3 smaller groups taking different areas of information to apply the methods. In plenary, listen to and discuss each group's presentation to reach consensus on which methods to use. When discussing the methods, check if: 1. They are the same ones used for the baseline (preferred); 2. They are easy/feasible to implement and if they will yield good-quality evidence; and 3. They are suited to the local community involved and if they will reach all intended (equity). Hang the completed chart from Worksheet 3.1b (showing agreed-upon methods) on the wall.	1 hour, 30 minutes

SESSION TOPIC	CONTENT AND PROCESS	TIMING
MCV Resource Part 3: Planning and addressing challenges	Discuss and agree on exactly where the performance evaluation will be done (and why), with whom (and why), and who will implement it. Recap and ensure consensus on the full plan for the performance evaluation. Consider what costs might be incurred and how they will be covered. Also discuss what resources may be needed and how/from where they will be obtained. Use a participatory exercise (e.g., Margolis wheel; card sorting) to raise challenges and discuss how to address them. Read the relevant section of MCV Resource Part 3 for any further information. Summarise what has been discussed and check for consensus. **For follow up:** The team will assign a member to summarise the agreed-upon plan for the performance evaluation and provide a copy to each team member. **For the next meeting:** Identify any remaining challenges and any follow-up actions that should be carried over to the next meeting. Implement the performance evaluation. You will need to schedule a separate time to review the results and think about what they mean for the SPH intervention, theory of change, and other stages of the evaluation.	1 hour, 30 minutes
TEAM MEETING 5a to analyse, review, and respond to the performance evaluation (<2hrs)		
MCV Resource Part 3: Organising and using findings	Introduce the options for organising, analysing, and reporting the performance evaluation findings (drawing from MCV Resource Part 3). Work as a team with Worksheet 3.2 to identify who will want/need to know what information from the performance evaluation. Using the chart from Worksheet 3.2, discuss how the team will complete the necessary tasks, including who will check the data in the field, clean the data, analyse the data, prepare the draft report, and how the team will review the draft. Discuss presenting the findings from the performance evaluation to appropriate audiences, including who to present to and why and who will do the presentation and in what format. **For follow up:** The team will assign a member to summarise the day's agreements and add this information to the evaluation plan, sharing a copy with each team member. Agree on who will bring in outside skills help if needed for the analysis.	1 hour, 30 minutes

SESSION TOPIC	CONTENT AND PROCESS	TIMING
TEAM MEETING 5b to analyse, review, and respond to the performance evaluation (optional meeting if more than one performance evaluation is to be done) (<2 hrs)		
MCV Resource Part 3: Organising and using findings, and addressing challenges	After the performance evaluation has been implemented, this meeting will be used to review the findings and address any issues from the first round, and to assess implications for the next round. Use a participatory exercise to raise and discuss challenges related to the evaluation and to the SPH intervention and how to address them. Summarise what has been discussed and check for consensus. **For the next meeting:** Identify any remaining challenges and any follow-up actions that should be carried over to the next meeting. Read MCV Resource Part 4 before the next meeting. You may need to schedule additional time to review the results and their implications for the SPH intervention and evaluation.	1 hour, 30 minutes
TEAM MEETING 6 to plan the outcome evaluation (½ day)		
MCV Resource Part 4: Implementing an outcome evaluation—measures	Introduce why and when to do an outcome evaluation (drawing from MCV Part 4). Introduce the eight key questions/types of information to be gathered in an outcome evaluation (MCV Part 4). Work as a team with Worksheet 4.1a to identify the measures/indicators to collect for the outcome evaluation. Have the charts for Worksheet 2.3 and 3.1b available as you may use information from them. Double check the plan for using the measures to avoid collecting more information than is needed. Discuss and agree on the final measures. Hang the final chart from Worksheet 4.1a on the wall for all to see and take a short break!	1 hour
MCV Resource Part 4: Implementing an outcome evaluation—methods	Introduce the methods for gathering different areas of evidence for the outcome evaluation (drawing on MCV Part 4 and using the methods table as a visual prompt). Work with Worksheet 4.1b to identify the methods for the information you want to collect in the outcome evaluation. It may be useful to break into smaller groups and have each group work on identifying methods for one of the categories of evidence. Present and discuss the methods in plenary to reach consensus. When discussing the methods, check if: 1. They are the same as those used in the performance evaluation? 2. They are easy/feasible to implement, and if they will yield high-quality evidence? 3. They are suited to the local community involved and if they will reach all intended (equity)?	2 hours

SESSION TOPIC	CONTENT AND PROCESS	TIMING
MCV Resource Part 4: Implementing an outcome evaluation—methods (continued)	Take time to discuss the measures and methods for the cost benefit/ social return on investment part of the evaluation, including what measures to collect and how to collect them (MCV Part 4). If needed, invite a person with financial analysis skills to provide more information on this and work with the team to identify the measures and how to collect and analyse them. Hang the chart from Worksheet 4.1b (agreed-upon methods) on the wall.	
MCV Resource Part 4: Planning and addressing challenges	Discuss and agree on exactly where the outcome evaluation will be done (and why), with whom (and why), and who will implement it. Recap and ensure consensus on the full plan for the outcome evaluation. Consider what costs might be incurred and how they will be met, as well as a what resources may be needed and from where they will be obtained. Summarise what has been discussed and check for consensus **For follow up:** The team will assign a member to summarise the agreed-upon plan for the performance evaluation and provide a copy to each team member. **For the next meeting:** Implement the outcome evaluation. You will need a separate time to review and discuss the results. Think about (and bring some examples) of effective ways to present the results.	1 hour
TEAM MEETING 7 to analyse, summarise, and plan communication of the outcome evaluation findings (<1/2 day)		
MCV Resource Part 4: Organising and reporting findings	Introduce options for analysing and organising the findings of the outcome evaluation (drawing on MCV Resource Part 4). Work as a team with Worksheet 4.2 to identify how to structure the analysis in relation to programme goals. Discuss as a team and agree on: • Structure and format for the analysis in relation to the key questions being addressed; • Who will do the analysis and when; and • Who should be asked to peer review the draft results (keeping key audiences in mind). Summarise what has been discussed and check for consensus. **For follow up:** The team will assign a member to summarise the agreed-upon plan for the outcome evaluation and provide a copy to each team member. Agree on who will bring in outside skills help, if needed for the analysis.	1 hour, 30 minutes

<table>
<tr><th>SESSION TOPIC</th><th>CONTENT AND PROCESS</th><th>TIMING</th></tr>
<tr><td>MCV Resource Part 4: Communicating findings</td><td>Introduce the options and issues to consider in reporting and communicating the findings (drawing on MCV Resource Part 4).

Work with Worksheet 4.3 to identify the target audiences for the findings and what content and format is best for each.
Discuss as a team and agree on:
• Structure and format of reports for the different target audiences;
• Who will do the writing of each report and when; and
• Who should be asked to peer review the draft reports (keeping key audiences in mind).

Summarise what has been discussed and check for consensus.

For follow up: The team will assign a member to summarise the agreed-upon summary plan for the outcome evaluation and share a copy with each team member. If outside skills are needed for the layout or copyediting of the reports, then agree on who will follow up on this.</td><td>1 hour, 30 minutes</td></tr>
<tr><td colspan="3">TEAM MEETING 8 to reflect on the process, evaluate the MCV Resource, and discuss next steps (<2hrs)</td></tr>
<tr><td>MCV Resource Part 5: Reflections, learnings, next steps, and additional resources

Evaluation of the MCV Resource and process</td><td>Implement a participatory activity (such as ‘ballots in the hat’) after the full evaluation process is complete to reflect as a team on:

• What worked well in the evaluation and why?
• What did not work well and why?
• What was useful in the MCV Resource for this process?
• What was most useful in the team meetings for this process?
• What would you do differently in future?
• What questions or concerns do you still have?

Remind the team that MCV Resource Part 5 includes a compiled methods table and additional resources that may be useful for future work. Conduct a round robin with participants, discussing what they have learned and how they may use this knowledge going forward.

Ask participants to complete the formal evaluation form.
Complete and send TARSC the facilitator's evaluation form.

Congratulate, celebrate, and close!</td><td>1 hour, 30 minutes</td></tr>
</table>

3: Your role as a facilitator

As a facilitator, you may be part of the team implementing an SPH evaluation, you may be an official in the agency implementing the SPH intervention, or you may be an independent consultant with relevant skills who has been engaged to assist in the work. The specific details will depend on the context, as will the number of facilitators involved. For workshops that last more than a day, it is common to have two or more facilitators working together. The resources in Appendix 1 provide general information on how to facilitate training activities.

Co-facilitators need to prepare and function as a team, with each of you being very clear on your specific roles and responsibilities. Co-facilitators can:

- Assist with workshop planning and logistics, including identifying and securing the location, inviting participants, and gathering resources and materials needed for sessions;
- Keep notes on the sessions as well as the ideas, discussions, and issues raised;
- Photograph and label the final flip charts, sticky notes, cards, and other visuals produced during participatory activities;
- Help with timekeeping to ensure that the schedule is followed; and
- Help with communications, including invitations, reminders, surveys, and feedback.

FOR ALL THREE APPROACHES, THE FACILITATOR'S GENERAL ROLE IS TO:

- Communicate with participants beforehand, introducing them to the MCV Implementer's Resource and the purpose and timing of the session, and informing them of anything they need to do to prepare for or bring to the session. This may include resources from or information about their own experiences with SPH evaluations that they wish to share.
- Provide an overview of how to navigate and use the Resource effectively.
- Share knowledge and expertise regarding:
  - o evaluation techniques outlined in the Resource,
  - o application of evaluation techniques to SPH interventions,
  - o participatory adult learning methods,
  - o active participation in the evaluation, and
  - o use of virtual/online platforms, where relevant.
- Link participants to further resources and personnel.
- Evaluate the session(s) and use gathered feedback for own purposes and provide feedback on use of the Resource to TARSC (See Section 7).

THERE ARE ALSO FACILITATOR ROLES SPECIFIC TO EACH APPROACH

FOR THE THREE-HOUR OVERVIEW

- Give an overview of the Resource and its uses to a variety of audiences
- Address queries and offer ideas for next steps, such as the three-day workshop and/or use in teams

FOR THE THREE-DAY WORKSHOP

- Plan, prepare, and implement the three-day workshop as appropriate for participant characteristics
- Draw on other resources/skills as needed
- Present information from the Resource or organise presenters to do this, including design and facilitation of group activities, use of worksheets, and discussions to engage participants

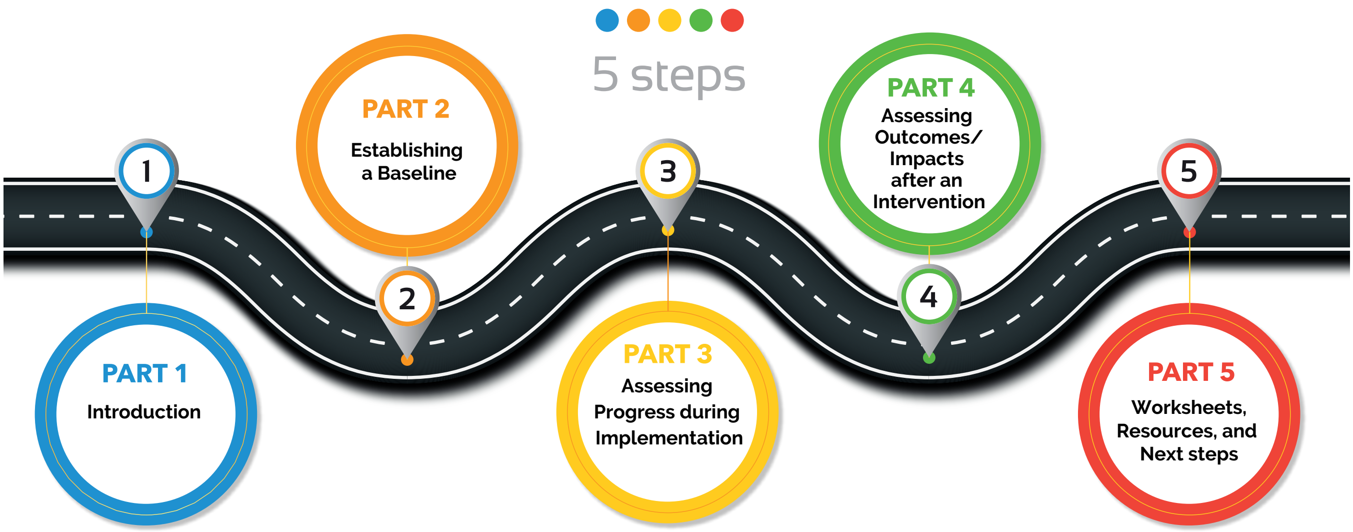
FOR REAL-TIME EVALUATION COACHING

- Appreciate the composition of and support the team implementing the evaluation and bring in people with additional skills as needed
- Familiarise yourself with and understand the SPH intervention being evaluated
- Build team capacities to carry out evaluations in future
- Facilitate use of the worksheets to apply information from the Resource to the evaluation
- Ensure shared participation, presentation, learning, reflection, and review involving all team members in all stages of the evaluation
- Include team inputs in key decisions on the evaluation design, implementation, and reporting
- Ensure liaison with key stakeholders at relevant points
- Raise and ensure with the team that ethical principles are met

As a facilitator, assuming you are not working with your own SPH colleagues, it will be useful to find out ahead of time who the participants in your workshop will be, including what SPH work and evaluation experience they have, and what interventions they are involved in. This will help you tailor the session(s) to the details of their work, such as by incorporating relevant examples. If it is not possible to tailor details to your participants in advance, you can also draw out examples from participants during the session. Or you may choose a hypothetical example to work with, either from your own experience or from relevant resources, such as the many stories of change and case studies of SPH interventions on the Shaping Health website. If time is limited and you want participants to try out worksheets or tools, such as in a 3-hour session, you can use these examples to prepare partially completed worksheets so that participants can work with and complete them in the time available. It can be particularly useful to have one example of an SPH intervention, hypothetical or real, that you follow across all three stages of evaluation.

4: Using the MCV Implementer's Resource

We recommend that you, as a facilitator, read the Resource from beginning to end, reviewing all five parts in the order they are presented (as shown in the graphic below). Once familiar with the Resource's contents and organisation, you may then dip in and out and select specific content as needed.



Parts 2, 3, and 4 of the Resource provide key information for implementing each stage of an evaluation. Each part follows a common structure, described below. Also below is a key to the icons used in the Resource for different types of information. Each section of the Resource:

a. Introduces the **PURPOSE** of the evaluation stage being discussed.

b. Includes **DEFINITIONS** of key terms.

c. Provides real-world **EXAMPLES** of use of methods.

d. Outlines key categories of information needed and the **MEASURES** for these. This is summarised in a table in each part.

e. Explains the **METHODS** used to gather information. The methods are summarised in a table in each part and there are links to more detailed information. The table in Part 5 compiles all of the methods and tools.

f. Includes a section on **CHALLENGES** and how to tackle them.

g. Supplies **WORKSHEETS** that help participants apply what they learned to their own SPH evaluation efforts.

'How to' information and guidance

Yellow text boxes like this one feature practical 'how to' information and guidance.

More resources

This icon indicates links to more comprehensive guidance for methods described.

Real-world examples

Green text boxes offer real-world examples of social participation in health.

Worksheets

Orange text boxes alert you that a worksheet is available on the topic just covered.

Definitions

This icon signifies the definition of a key term used in the text. The terms are also compiled in the glossary in Part 5.

The table on the next page provides an overview of the Resource's contents. The third column in the table describes issues to consider as a facilitator. Selecting what to use from the Resource depends on the purpose of the session you are facilitating and the context and nature of the evaluation. For example:

- During a three-hour overview, you may focus on the real-world stories, the general information on measures and methods, and a few demonstration examples.
- During a three-day workshop, you will have time for deeper discussions of specific measures and methods, and for completing worksheets that are relevant for the participants.
- When using the Resource within an evaluation, we suggest you follow it as presented and use the worksheets to select and give more focus to the measures and methods that are more pertinent to the specifics of the SPH evaluation being conducted.

Resource contents and issues for facilitators to consider

AREA OF TRAINING	WHAT THE MCV RESOURCE PROVIDES	FOR FACILITATORS TO CONSIDER
The **Introduction** to the MCV Resource explains why it was written, for whom, and what it provides.	The Introduction outlines the purposes, and intended target audiences. The table of contents is a useful summary of what is in the Resource. In the electronic version, it includes hyperlinks. A real evaluation story is told in stages throughout the Resource, with each new part featuring a new instalment of the evaluation story.	As a facilitator, the specific content you use from the MCV Resource will depend on the type and duration of the session you are facilitating. If you are facilitating as part of an evaluation, it will also depend on where in the intervention your team is, as well as what you hope to get from the evaluation and what resources you have. The Resource has many examples, but do add your own!
MCV Resource **Part 1** provides an overview of SPH and discusses the importance and types of evaluation. It also summarizes ethical considerations related to evaluation.	Part 1 introduces the first part of the real-life evaluation story that runs throughout the Resource. Part 1 also provides introductory information on: • SPH in health, its impact, and why we evaluate it • The three stages of evaluation, how they are used, and what skills are needed; and • The ethical principles that apply. Worksheets 1.1 and 1.2 help to identify stakeholders who may want to know the impact of an SPH intervention and the skills that members of an evaluation team need.	Part 1 helps you to situate your evaluation, why you are doing it, for what SPH intervention and what skills you will need. This part is lighter on new information than subsequent parts, making it easier for this part to be very interactive in a session.
MCV Resource **Part 2** covers: —Developing a theory of change; —Implementing a baseline assessment, including measures and methods; —Organising and using findings; and —Planning for challenges.	Part 2 opens with the next stage of the real-life evaluation story and then explains how to develop a **theory of change.** Worksheet 2.1 helps to clarify the theory of change as well as the inputs, outputs, and outcomes that link to it. Part 2 provides details on the following elements that go into designing and planning a **baseline assessment**: • **MEASURES:** The key categories of evidence are discussed, and Table 2a provides specific measures for aspects of SPH. Worksheets 2.2a and 2.2b help to identify measures to use. • **METHODS:** Different methods are discussed and summarised in the table on page 2.11. Worksheet 2.3 helps identify the methods to use.	When preparing to use Part 2, be clear about how it relates to your SPH intervention. Use your theory of change to think about how the intervention plans to produce change. Then choose the measures that will help you to assess the current situation relating to the key pathways for change. When identifying the measures and methods for the baseline, keep in mind the performance and outcome evaluations that follow, as you'll need to collect information in the baseline that you can compare in these later stages.

AREA OF TRAINING	WHAT THE MCV RESOURCE PROVIDES	FOR FACILITATORS TO CONSIDER
MCV Resource **Part 2** (continued).	• **ANALYSING AND REPORTING:** Options for analysing and reporting findings are presented. Worksheet 2.4 helps identify who to report findings to and how. • **CHALLENGES:** Possible challenges and how to address them are discussed.	If you haven't already done so, reading parts 3 and 4 of the Resource now would be useful. These parts have a lot of new information! If participants are new to evaluation, it may be better to cover the content of Part 2 in a training session before doing the worksheets.
MCV Resource **Part 3** covers: —Implementing a performance evaluation, including the measures and methods used; —Organising and using findings; and —Planning for challenges.	Part 3 opens with the next stage of the real-life evaluation story, and provides details on the following elements for designing and planning a **performance evaluation:** • **MEASURES:** The key categories of evidence to assess progress in implementing the SPH intervention, and Worksheet 3.1a to identify measures to use. • **METHODS:** Different methods are discussed and summarised in the table on page 3.5, including how to perform a cost-effectiveness analysis, linking the costs of inputs to outputs. Worksheet 3.1b can be used to identify the methods to use. • **ANALYSING AND REPORTING:** Options for analysing and reporting findings, especially to support a strategic review, are discussed. Worksheet 3.2 covers how to organise information to report to different audiences. • **CHALLENGES:** Possible challenges and suggestions on how to address them are discussed.	When preparing to facilitate Part 3—after familiarizing yourself with the content, examples, methods, and worksheets—you may want to visit links on unfamiliar methods that seem useful for your purposes. If your SPH intervention has already started and you do not have a baseline, then go back to Part 2 to help participants think about what available baseline information can be collected at this stage. You could use the Part 2 worksheets to help participants build the baseline before starting Part 3. The challenges section is not comprehensive; discuss the issues included, but ask participants what challenges they have faced and discuss options to address them. For some challenges, the team may need to gather advice from others to be shared in the next meeting.
MCV Resource **Part 4** covers: —Implementing an outcome or impact evaluation, including the measures and methods used; —Organising, using, and communicating findings; and —Planning for challenges.	PART 4 opens with the next stage of the real-life evaluation story and then introduces the **outcome/ impact evaluation.** It provides: • **MEASURES:** The key categories of evidence to assess outcomes/impacts from the SPH intervention, and Worksheet 4.1a will help identify measures to use. • **METHODS:** Different methods are discussed and summarised in the table on page 4.7, including how to do a cost-benefit analysis, linking the costs of inputs to outcomes. Worksheet 4.1b can be used to identify the methods to use.	Remind yourself of the difference between an impact and an outcome evaluation, raised in Part 1. The good news is that many of the measures and methods in an impact/outcome evaluation repeat those used earlier, so you and your team/participants should find the process more familiar! Keep asking participants questions to answer from reading the Resource.

AREA OF TRAINING	WHAT THE MCV RESOURCE PROVIDES	FOR FACILITATORS TO CONSIDER
MCV Resource **Part 4** (continued).	• **ANALYSING AND REPORTING:** Options for analysing and reporting findings are covered, and Worksheet 4.2 will help identify how to organise findings to answer the evaluation questions. Worksheet 4.3 will help to identify how to report to the different audiences that may be interested in the findings. • **CHALLENGES:** Possible challenges and how to address them are discussed, together with issues for reflection with the team on the process.	If you are working through the Resource to design the evaluation, this is a good time to identify any challenges or design decisions you and the team need to address before implementing the evaluation. In the conclusion of Part 4, there are questions to reflect on the whole process. You can take this into the next session.
MCV Resource **Part 5** offers: —Reflections, learning, and next steps; —Additional resources; —Evaluation of the MCV Resource and process; and —Worksheets.	Part 5 opens with final reflections on the real-life evaluation story presented in parts 1-4, and: • Introduces next steps, • Includes a summary table of the methods and tools used in evaluation, • Provides a glossary of terms, • Provides links to literature and online resources, and • Provides the 11 worksheets.	At the end of your evaluation efforts, prepare to discuss and reflect on the experience with your team. At the end of Part 4, there are a series of questions you can use for this. You can also find methods for reflection in the sample schedules in Section 2 of this guide. Don't worry about making errors if this is your first time facilitating an evaluation—the resources help, but experience is the best teacher!

A community health worker conducting a survey in the Korail, Bangladesh, UK DFID under CC.

5: Using the worksheets

Part 5 of the Implementer's Resource features 11 worksheets. You are welcome to download and photocopy them to hand out to participants for their individual use, or you may also ask TARSC for a separate electronic file containing writable worksheets. Prior to a session, you should carefully review the worksheets that you plan to use and take notes that will help you to guide participants through the exercises. All three types of sessions will introduce the worksheets, noting their purpose, locations in the Resource, and how they can be used. However, you may then use the worksheets differently in different session types.

FOR THE THREE-HOUR OVERVIEW

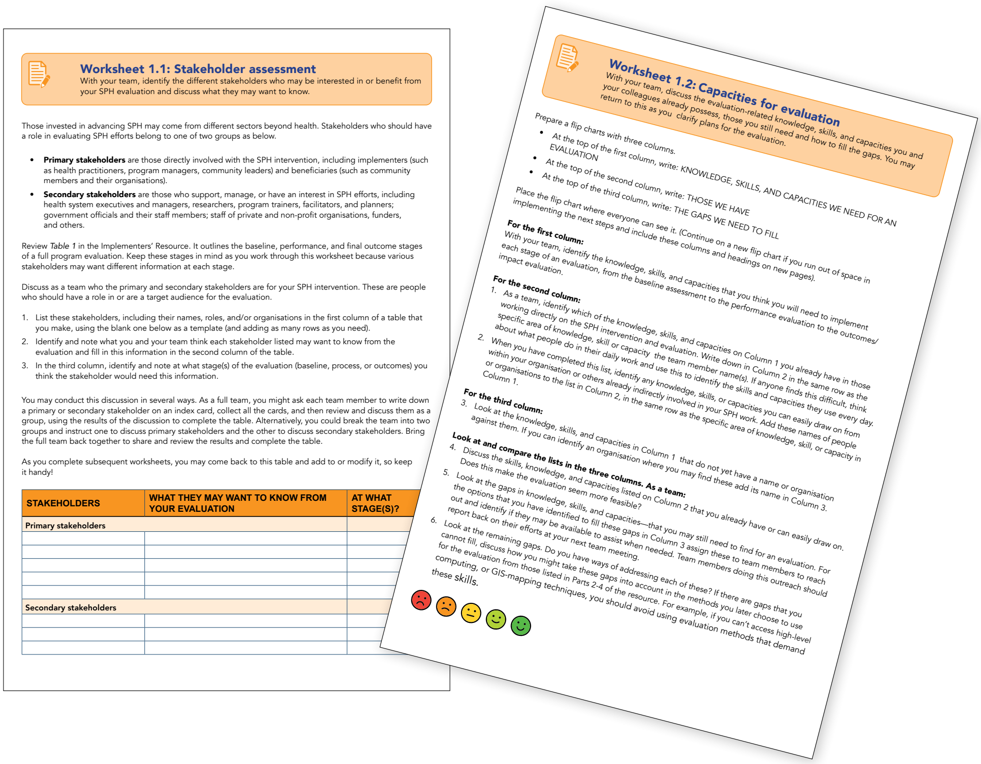
- Start with a partially completed worksheet as an example, and walk through how to complete it.

FOR THE THREE-DAY WORKSHOP

- Use selected worksheets as group exercises to introduce or reinforce a section in the Resource and include time for questions on the worksheets.
- If the workshop goal is to develop an evaluation plan, then transcribe the worksheet outputs into a shared document

FOR REAL-TIME EVALUATION COACHING

- Use all of the worksheets if you and your team are designing and implementing all three stages of evaluation; otherwise, use only the worksheets that align with the particular evaluation stage you are implementing.
- If the worksheets are being done in groups, have co-facilitators available to assist participants.
- Transcribe the information from each worksheet into a document that captures the design of and plan for the evaluation and share it with the team.



6: Final tips: preparing for and facilitating the sessions

Successful evaluation training sessions require careful preparation. This is one of the most important tasks of a facilitator.

PREPARATION FOR ALL APPROACHES INVOLVES:

- Communicating with participants regarding the details of the workshop and participant areas of work.
- If working with a facilitation team, agreeing on the programme, roles, and realistic time demands. Developing a step-by-step, annotated facilitator's agenda helps all to be on the same page.
- Preparing necessary materials, including the agenda, worksheets, presentations, and participatory activities. Check that the links work for all of the online resources you are using in the session.
- Conducting a test run before a virtual session to ensure familiarity with and functioning of the online platform.
- Setting up and preparing the venue for in-person sessions, as needed, and sharing materials and helpful information in advance of online sessions. Keep in mind, however, participants may not have read materials sent in advance of sessions.
- Overseeing room layout for in-person sessions, including participant seating, lighting, ventilation, noise considerations, audio-visual equipment, and electrical outlets. Also assess the amount of space needed, including for breakout rooms, as well as floor, table, and wall space for group and participatory activities.
- Gathering materials, including flip charts, stationery, name tags, pens, sticky notes.
- Managing language and cultural issues, such as language interpretation, dietary restrictions, and arrangements for participants who may be sight or hearing impaired.
- Preparing a participant registration list, a programme, and adequate evaluation forms for distribution.

SPECIFIC SESSIONS MAY HAVE PARTICULAR PREPARATION NEEDS:

THREE-HOUR OVERVIEW

- Ensuring that the content suits the audience.
- Providing a participant contact list and information on follow-up activities.

THREE-DAY WORKSHOP

- Reviewing participants' experiences and backgrounds to help ensure that the workshop will meet their needs, and being flexible to adapt the programme if new issues or needs arise.
- Having a step-by-step plan for each day of the workshop with timings, roles, resources, and process.
- Inviting other people needed to give inputs to sessions, such as expertise in economic analyses.

REAL-TIME EVALUATION COACHING

- Ensuring that team members' skills and roles are clear; finding ways to address any gaps. As outlined in the Resource, bringing in additional expertise may depend on the stage of the evaluation or the demands of the methods, such as for data analysis or report writing.
- Preparing timing and content of team training sessions to meet team and process needs.
- Preparing a shared calendar, including team training meetings, to support the evaluation.
- Integrating into session design:
    - reporting on follow-up issues
    - evaluating the findings to date
    - discussing challenges
    - thinking ahead to plan next steps
    - recognizing and celebrating

In the MCV Resource, various evaluation methods are briefly described and you will find links that take you to more detailed information on how to implement them. In preparing to use the methods, think through all of the steps in the activities and be sure you are clear on the materials you will need; how you will divide people into groups, if needed; how you will track/record results; and what questions you will ask to probe and discuss the findings.

Many of the methods in the MCV Resource are participatory and interactive and capture information in charts and visuals. Before you use them in workshops/sessions for training, it is a good idea to practice facilitating them with friends, colleagues, or others acting as participants. This may raise issues that you will want to prepare for ahead of time. For online/virtual sessions, you may find a range of participatory tools helpful, such as whiteboards, charts, polling, and presentation software (such as Mentimeter in the Zoom platform). Here, too, it is useful to practice how you want to use these tools before your session.

Community - health worker participatory joint review, Lusaka, A Zulu 2013.

DURING SESSIONS, generally facilitators can more successfully guide the processes if you:

- Are prepared, flexible, responsive, welcoming, and work as a member of the team, sharing active facilitation, recording, helping, and time-keeping roles.
- Actively listen, observe, ask questions, enable, steer, and do not dominate discussions. This means managing who speaks; not letting a few participants dominate the conversation and dealing with disrupters; and being sensitive to language, cultural, and disability issues.
- Use the wisdom in the room and encourage critical thinking, working with adults in ways that respectfully deal with the unexpected, manage conflict, reach consensus, and agree on differences.
- Are aware of the ways that power structures, outliers, sensitivities, and stigmas affect the participant group, and organise commitment by all to shared principles / rules to ensure ethics and shared values of respect and consideration.
- Use 'ice-breakers' and other activities for participants to get to know each other at the start of sessions and to energise participants where needed during sessions.
- Conclude individual sessions with summaries of what has been learned, agreed upon, or planned, and ask for consensus on the summaries; and introduce forthcoming session objectives, what will be covered and any homework assignments.

7: Integrating feedback

As a facilitator, keep your ears and eyes open at all times for signals from participants. They may experience difficulties or disagreements that you will want to deal with before moving on. It is also important to build in, at various points, different ways of eliciting feedback on how sessions are progressing. The team that developed the MCV Implementer's Resource are also keen to know your experiences and perceptions after using it.

To help gauge the effectiveness of your session, it is a good idea to conduct before and after assessments of participants' understanding of and confidence to implement an evaluation. For example, before a session starts, you can have participants use a Likert scale to rate how much they understand about evaluation and how confident they feel about implementing the different elements of evaluation, such as developing a theory of change, conducting a baseline assessment, evaluating outcomes, and other features covered in the Resource.

You can repeat this activity at the end of your session to see how things have changed. You can also do this before and after assessment in a more participatory way, using an outcome star or wheel chart, described in Part 4 of the Resource, with the points or quadrants covering the key areas of knowledge.

At the end of a session, you can also use an online or paper survey for participants to give anonymous feedback.

To encourage participants to reflect on and continue learning, you may ask them to share their contact information and remain connected around their evaluation experiences to help address challenges encountered and to share examples of what worked well and any new tools used.

DURING AND AT THE END OF SESSIONS, the following activities will help to integrate feedback, address any difficulties participants are having, and improve your facilitation skills.

- At the end of each major topic area, request feedback from participants, asking if they understood the content. Be sure to address any difficulties raised and remind participants that problems encountered are not participants' problems, but problems in how the information was communicated!
- At the end of each day, you may ask participants to reflect on their perceptions of the day. Participatory tools—such as the smiley face rating chart shown in Worksheet 1.2 or 'ballots in a hat' referred to in Worksheet 4.3— may help to open up the discussion.
- It is useful for the team of facilitators to review how a session/day went, what worked well, and what needs to be strengthened and how. This is really helpful in building shared facilitation experience and skills.
- At the end of the whole process, it is useful to have a formal session to reflect on the learning, remaining issues and queries, and next steps. You can complement this with formal evaluation forms (including online forms), which are discussed in the next section. It could be useful to record the session on video (after obtaining participant permission) or to capture useful quotes to share experience or encourage wider support.
- If the workshop/session is being held as part of a formal institutional process, don't forget to discuss the final reflections and feedback with managers and funders to help gain their support for future evaluation plans.

GENERALLY, FOR ALL APPROACHES:

- Use daily checks, such as the smiley face ranking tool, to gauge how participants are feeling about the contents and activities of the workshop; address any questions/concerns raised.
- At the end of each day, reserve time for participants to offer feedback, and for facilitator debriefings.
- As facilitators, reflect on the process of facilitation, any challenges/issues noted, and ways of dealing with them.
- There are many examples of participant evaluation forms you can refer to online or elsewhere when developing one relevant to your session. The resources in Appendix 1 have examples of forms that you can modify.

DIFFERENT APPROACHES REQUIRE PARTICULAR KINDS OF FEEDBACK

THREE-HOUR OVERVIEW

- Distribute a short, end-of-session evaluation form for participants to complete.

THREE-DAY WORKSHOP

- Implement a participatory evaluation—such as the 'ballots in the hat' method at the end of the workshop.
- Distribute a short evaluation form for participants to complete.

REAL-TIME EVALUATION COACHING

- Use quick, participatory tools at the end of a meeting to assess how participants are feeling and identify any lingering concerns; follow up on those feelings or concerns before or at the next meeting.
- Hold a reflection session to elicit participants' views of the process (see the sample schedules in Section 2 for detail).
- Distribute a short evaluation form at the end of the process for participants to complete.

We are keen to know how well the MCV Implementer's Resource worked for you and how it can be made more useful! Please complete and submit the facilitator's evaluation form available online at https://www.shapinghealth.org/node/85 to give us feedback on the MCV Resource and its use.

This is a really important feedback form for us! It will not take long to complete. The feedback will remain anonymous unless you choose to provide your information to keep in contact on follow up processes. The feedback will be used to improve the MCV Resource and this Facilitator's Guide. You can scan the questions in the online form before you complete and submit it. Aside from this feedback, please also email us at admin@tarsc.org any examples or photos of tools and worksheets or photos of sessions held. Please label of these with the subject, place, photographer's name, and date. We will include useful examples with credits in the online PowerPoint slide set. Everyone who uses the Resource and/or the Guide and shares their feedback and advice on sessions with us will be invited to online review meetings and can also access and learn from compiled user feedback made available on the Making change visible page of the Shaping Health website.

You will find the interactive electronic Implementer's Resource, with links to resources, tools, and real-world examples on the Shaping health website.

This Facilitator's Guide is available on the Shaping Health website together with the form to provide online feedback on how you used it, what worked and did not work well, and your suggestions for improvements.

Scan the QR code or visit
https://www.shapinghealth.org/making-change-visible
to access the *Resource*, the *Guide*, and online feedback form.

Appendix 1: Additional facilitator resources

1. UN Habitat (2015) Quick Guides for Policy Makers: Housing the Poor in African Cities Facilitator's Guide, UN Habitat, Nairobi
2. US Centers for Disease Control and Prevention (2011) CHOICES: A Program for Women about Choosing Heathy Behaviors, Facilitator Guide CDC, Atlanta
3. WHO (2017) Innov8: Facilitator's Manual for the Innov8 Approach for Reviewing National Health Programmes to Leave No One Behind, WHO Geneva
4. WHO Regional office for Europe (2018) Facilitator Guide: Using Research in the EVIPNet Framework. WHO Euro, Copenhagen
5. Małachowska A, Jones N, Abu Hamad B, et al. (2020) GAGE Virtual Research Toolkit: Qualitative Resources with Young People on their Covid-19 Experiences, London
6. Lewis F, Muzzy S. (2020) Conducting Virtual Focus Groups, online
7. Laverdière D, Hayes SM (2020) Best Practices for Virtual Focus Groups, online

Colors of Cancer Walk & Health Resource Fair, City of Miami Gardens, under CC BY-NC-ND 2.0.

TARSC, 2022