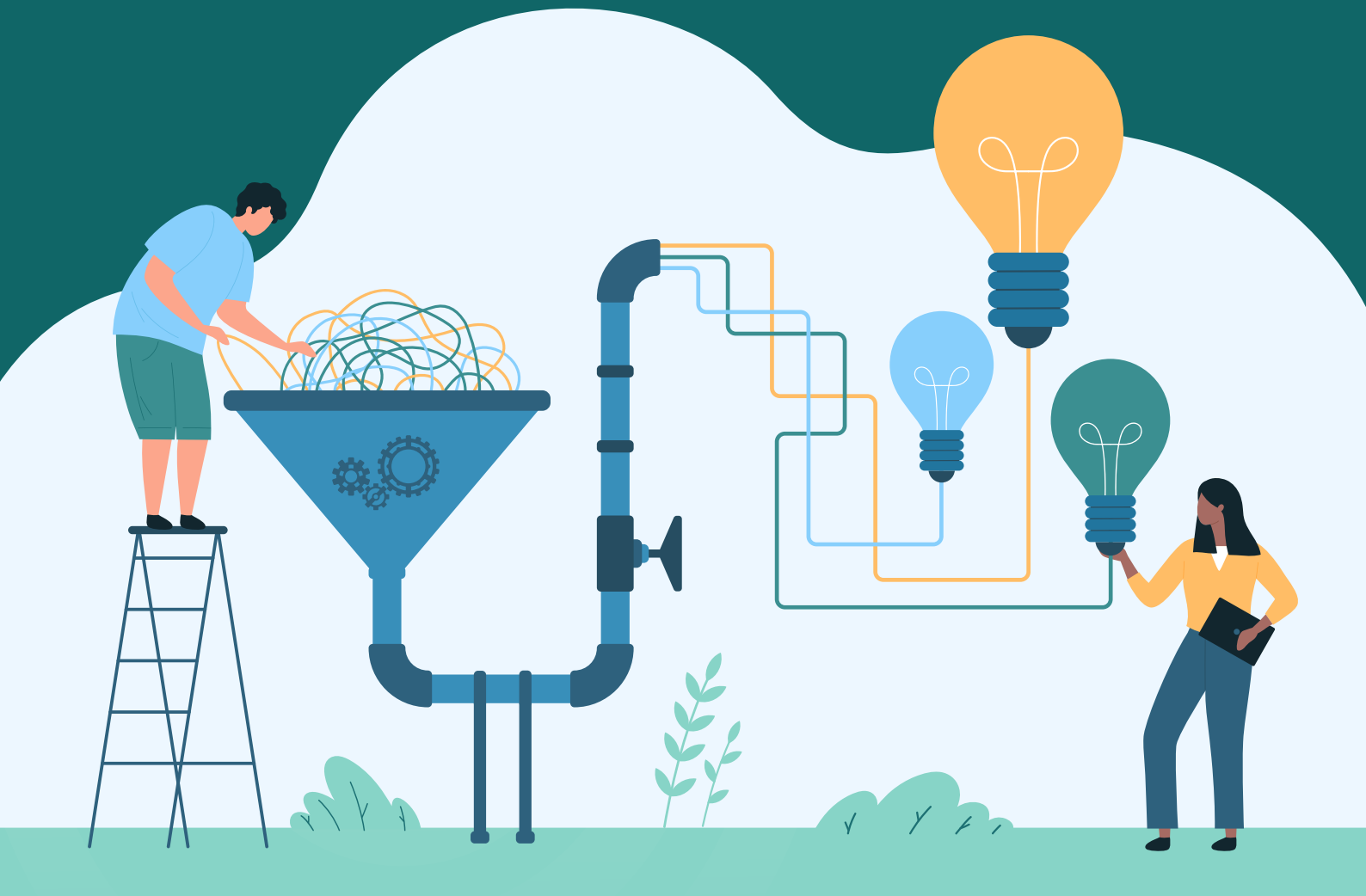
SPORT ENGLAND

NELP

Planning and Developing your Place Evaluation

For Place-Based Systemic Approaches to tackling physical activity inequalities

September 2025



Contents

1. The evaluation journey 4
2. Principles and ways of working 6
3. Considerations before confirming your evaluation approach 7
4. Evaluation and learning expectations of Sport England funding 9
5. Evaluation models – purposes, benefits and challenges 11
6. What should an evaluator do and how can we work in alignment? 14
7. How to prepare an evaluation brief 17
8. Examples based on Place Partnership work 24
9. Real-world reflections from Place Partners 28

This guide will support local partners to work through the practicalities of commissioning for, or resourcing, the evaluation and learning for their place-based systemic work. The guidance has been prepared by the National Evaluation and Learning Partnership (NELP), working together with colleagues from Sport England and Place Partners to bring together information and experiences.

A particular thank you to place partner colleagues: Claire Nichols (Bristol), Ed Pryor (Sheffield), Stephanie Laredo (Greater Manchester), James Bogue and Eleanor Yeo (Exeter).

How to use this guide

This guide is designed to help you understand the importance of evaluation and explore ways to build your capacity for it. Rather than offering a one-size-fits-all approach, it encourages you to consider what works best in your specific context.

Because every place has unique needs, interests, capacities, and resources, this guide does not provide step-by-step instructions for commissioning an evaluation. Instead, it offers a flexible framework and directs you to a range of helpful resources through embedded links.

To get the most out of this guide:

- Explore the overview to understand why evaluation matters.
- Reflect on your local context to determine what approaches might suit your needs.
- Consider how you can integrate the Place Evaluation and Learning Approach (PELA) to support your place-based systemic working.
- Follow the links to access tools, case studies, and further reading tailored to different situations.

Useful further resources and links

NELP website: Information on evaluation in place-based working, Conceptual Framework, Conditions for tackling physical activity inequalities, and other resources.
https://evaluatingcomplexity.org

Useful source for guidance around Evaluation methods

BetterEvaluation – Knowledge platform and global community: https://www.betterevaluation.org

UK Evaluation Society: https://evaluation.org.uk/community-learning/resources/

Information on Equitable evaluation principles

Equitable Evaluation Initiative: https://www.equitableeval.org/post/eef-expansion-principles

Evaluation as an Ecosystem: Cultivating Equity in the Garden of Transformation
https://www.tsiconsultancy.com/wp-content/uploads/0075_EQUITABLE-EVALUATION-REPORT-2024_AW3.pdf

Wider reference documents on evaluation of complex interventions and/or complex settings

Centre for the Evaluation of Complexity Across the Nexus: The Complexity Evaluation Toolkit, July 2021: https://www.cecan.ac.uk/wp-content/uploads/2022/07/Toolkit-2021-vJul-2022.pdf

Policy literature

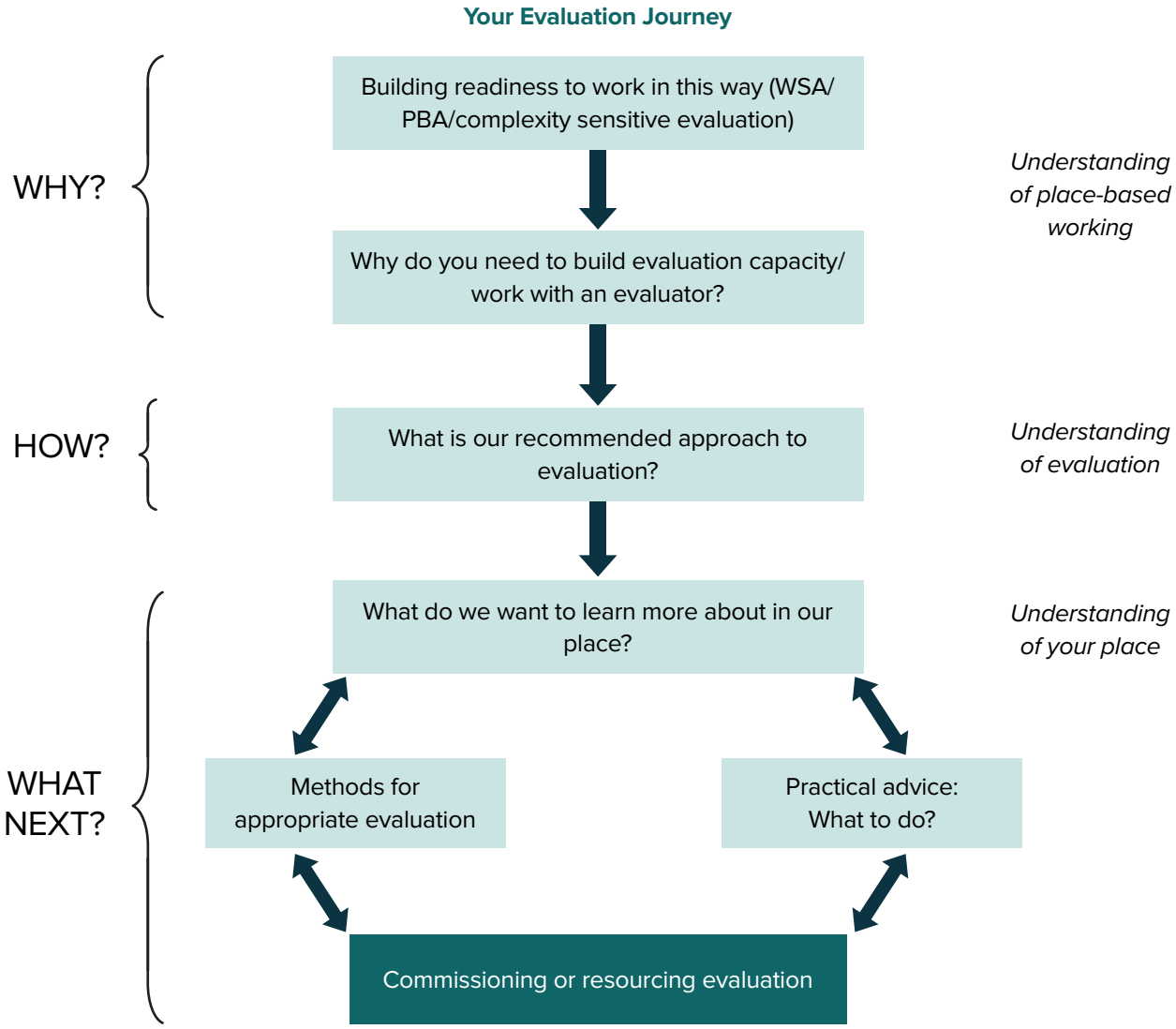
HM Treasury: Magenta Book 2020. Supplementary Guide: Handling Complexity in Policy Evaluation: https://assets.publishing.service.gov.uk/media/5e96c98ed3bf7f412d7f7bb0/Magenta_Book_supplementary_guide._Handling_Complexity_in_policy_evaluation.pdf

Department for Environment, Food and Rural Affairs Complexity Evaluation Framework: https://www.betterevaluation.org/tools-resources/complexity-evaluation-framework-recognising-complexity-key-considerations-for-complexity-appropriate

1. The evaluation journey

We recognise that every person and place may be starting at a different point in their understanding of place-based systemic working and evaluation. To navigate this we have put some common steps in developing, introducing, and embedding evaluation and learning in your work below.

Before you begin to use this guide to support you on your journey with complexity sensitive evaluation, it is important that you are comfortable with the idea of place-based systemic working and the approach to evaluation guided by NELP.



Why evaluate?

When working to understand complex systems, we need an appropriate and innovative approach to evaluation. Traditional methods such as baseline and follow up surveys, which do not consider how the context is continually shifting, are not appropriate to assess if something 'works' or not in this context.

Place-based systemic working goes beyond delivering programmes and projects and involves understanding and influencing the conditions within a place that could lead to more people being active, more often. The longer-term outcome of population levels of activity is not within our control directly, as many things can influence if, when, how, and why people become less or more active.

The actions you and partners take together may, however, contribute to creating a place which values and promotes opportunities for physical activity, building on community strengths and alleviating constraints – see conditions for tackling physical activity inequalities.

Place Partnerships can use evaluation efforts to reflect, learn and inform ongoing strategy and practice. If we pay attention to what works, for whom, in what circumstances, how and why, considering the context of your local place, then we can embed a learning culture locally and share learning with other places. Evaluation is an essential tool for navigating this work and gaining a better understanding of how and why change is happening.

How to evaluate?

As this way of working is new to us, we start by exploring the potential changes needed to achieve desired outcomes, even without knowing exactly what will drive them. Evaluation supports this by helping us understand how change happens, identify expected and unexpected consequences, and assess short- and long-term impacts. This process strengthens our evidence-informed theories of change, which can support your work.

Progress and impact are assessed by examining whether the underlying conditions for reducing physical activity inequalities are shifting. Evaluation focuses on increasing understanding of how, where, and why change is happening—or not—and sharing these insights with Place Partnerships and others to inform strategy and ongoing practice. It is important to have an evaluator or evaluation partner who can work with you as partners in this, and who can support you with this type of evaluation approach.

2. Principles and ways of working

Building on what NELP, Sport England and Place Partnerships have learnt we have distilled some key principles that are built around deeply relational, responsive, and adaptive ways of working.

Adaptability

Evaluation approaches need to be flexible and responsive to the needs of the work, rather than stick to a rigid structure which loses relevance over time. Place and evaluation partners must communicate and have ongoing review points.

Inclusive of diverse perspectives

Ensure a wide range of voices are included in the design of the evaluation and involved in the evaluation activities. This may need you to think and work more innovatively and inclusively (see introduction for link to equitable evaluation principles).

Appropriate and proportionate to context

Use a broad range of data sources and methods that are appropriate for the evaluation questions and audiences. These must be responsive to the local setting and wider context which contribute to delivering long-term sustainable change. Consider the resources and capacity in place.

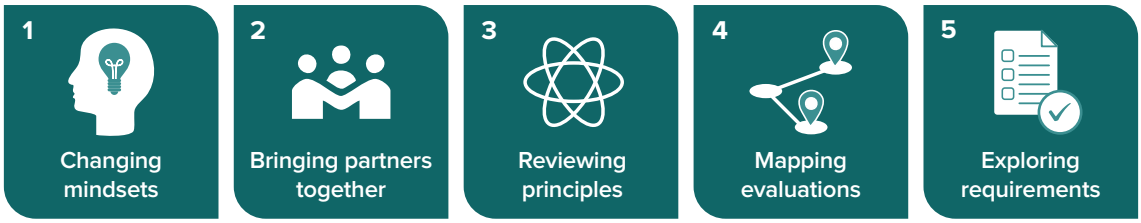
Focused on the how and why

Work in a way that asks why, acting as a critical friend, and highlight what may or may not be 'working'. Evaluations should develop and continually refine explanations of change, these in turn should be used to influence the work (learning to action cycles).

3. Considerations before confirming your evaluation approach

Before deciding how to approach evaluation – whether through commissioning an evaluation partner, hiring staff, or building capacity within your team – it's essential to understand the local context of evaluation and the needs and expectations of people and partners involved.

Consider these five key actions to inform your approach. These are fairly comprehensive, and may themselves develop over time, so even if you can't do them all immediately, be aware of what you do know/can do and try to include these often in review.



1. Helping people and partners develop the mindset and skills to understand and use evaluation and learning effectively

- Alongside planning your place-based approach consider assessing your own understanding of evaluation to become an advocate.
- Engage with partners to explore their views on evaluation and its importance. Involve them from the start in design and decision-making and allocate resources for building their evaluation capacity and skills.
- The goal is for evaluation to be seen as everyone's responsibility, not just for accountability, but also as an essential tool for guiding strategy and practice.

2. Bring partners together to ask key questions about the purpose of the evaluation

Identify who should be involved in shaping the evaluation and consult with them to understand their motivations and needs. Key questions include:

- What are the main things we want to learn?
- What is of highest priority for each partner, and how can resources be used effectively? (*Prioritise the views of people in communities*).
- How and why do people see things working (i.e. an Explanatory Approach)?
- How do people think change will happen (Theory of Change)?
- What methods would be useful to measure change, and who will manage them?
- How will we share findings and use the results?
- Are there methods of interest for measuring change? Do these link to what you want to learn about?

Multiple methods exist, such as Realist Evaluation, Ripple Effect Mapping, Stories of Change, Participatory Systems Mapping, Qualitative Comparative Analysis, and Agent-Based Modelling. Further information and examples are available on the CECAN website.

3. Review the Equitable Evaluation Principles and feature in the evaluation design

Evaluation should be designed with equity at its core. It should address critical questions about how historical and structural factors have shaped current conditions, the effects of strategies on different populations, and how cultural context influences both the challenges and the change process. (See link to Equitable Evaluation Framework principles).

4. Sharing and mapping current and past evaluations, along with the learning spaces, processes and informal learning partners have

Key questions include:

- What evaluations have been done, and what insights were gained?
- What data and insights do partners already have, and how is it captured?
- How can existing networks and processes be used to support future evaluation efforts?

Mapping other current evaluations can highlight opportunities to align efforts, reduce duplication and identify existing assets (perspectives, skills, networks, and practices) that can support evaluation and learning. (See link to the NELP Evaluation and Learning Asset Mapping tool)

5. Explore the requirements of the evaluation

Think about requirements of the evaluation and plan to discuss them with local partners and an evaluation partner to explore how they can support and align with these needs.

Are there any local priorities?

- Are there any local requirements from partners?
  Think critically about this. Are they appropriate for evaluating in complex systemic ways of working?
- Are local residents involved?
  What information, data and insight is important to local people in the place? Importantly, the community are both participants and architects of this work. How will methods support capturing community voice or involvement?

Are there any Active Partnership areas of alignment or support?

- Check in with your Active Partnership to ensure you are sharing resources and not duplicating efforts. In particular look for synergies with System Partner and other Place evaluation work in your area.

Are there any requirements related to your funding awards?

The requirements listed below will be covered in more depth in Section 4.

- Place Evaluation and Learning Approach (PELA) which details a list of requirements for places in receipt of Full Awards.
- Theory of Change
- Evaluation and Learning Plan
- System Maturity Matrix (SMM), survey and participation in Configurational Comparative Analysis (CCA)
- Evaluation and Learning Reporting: Evaluation and Learning Submissions, Impact Reporting

4. Evaluation and learning expectations of Sport England funding

Ambitions for evaluation and learning through Uniting the Movement

Sport England's approach for Uniting the Movement identifies three ambitions for evaluation and learning:

- To embed Evaluation and Learning
- To improve how we evaluate
- To apply what we learn

Place Evaluation and Learning Approach

To achieve the ambitions above within place-based systemic working, Sport England have iteratively developed the Place Evaluation and Learning Approach (PELA). The approach is based around a set of related and interconnecting components that guide evaluation and learning within Place Partnerships. It is based on learning from place partners about evaluation and evaluation best practice guidelines. This is proportionate for each place depending on their award.

The PELA will enable places and Sport England to build causal explanations and understand if, and how, place-based systemic approaches are working in relation to prioritised outcomes at a local, programme and population level.

The combination of components together enables the local places and Sport England to causally understand progress, change and outcomes, at a local programme and population level over time.

System Maturity Matrix: Using the System Maturity Matrix as a reflective and developmental tool with partners to explore the cross-cutting conditions in their Place can help to generate valuable insights, identify priorities and the types of actions needed to narrow physical activity Inequalities.

Evaluation and Learning Plan: The Theory of Change sets the scope of what can be evaluated and learnt about. This then informs Identifying the evaluation and learning questions, key priorities and the selection of evaluation methods to capture relevant data. In this way, the Theory of Change informs the Evaluation and Learning Plan. The data captured and analysis and synthesis that happens should be used to test and refine the Theory of Change. This can help to establish and explain if, when, how, and why, change is occurring.

Evaluation and Learning Submission: Focusing on articulating how and why change is envisaged to occur as part of your Theory of Change process is good practice for producing explanatory accounts as part of the Evaluation and Learning Submission shared with Sport England. See more on NELP Explanatory frameworks and accounts here. The explanatory accounts can be used to reflect on your Theory of Change and what is it about the place-based systemic approach that is contributing to that.

Configurational Comparative Analysis (Full Award and Deepening): Participating in CCA on an annual basis, supports bringing data together in a case-study. Analyses are undertaken by the National Evaluation and Learning Partner and shared with Place Partners through a local sense-making session. This can contribute to 'testing' a Theory of Change through evidencing pathways

to impact. It can also provide a basis for reflecting on and reviewing your Theory of Change and updating evaluation priorities and needs.

Moving Communities Place: Moving Communities Place can contribute to the local data, insight, and understanding of physical activity. The structured and collaborative approach supports Place Partners to identify the long-term outcomes of interest, and then how Moving Communities Place can help to collate and use location of physical activity and participation data to inform planning and action, as well as track changes in physical activity and update the Theory of Change over time.

Midpoint and End of Award Impact Reporting (Full Award and Deepening): Through this form of Impact reporting, Place Partners are asked to bring together the data they have (data synthesis) and reflect on it in relation to the Theory of Change, and use that to produce a summary of the progress and change in outcomes (impact) that has occurred during that time. This can then be used as an input to iteratively review and update the Theory of Change and Evaluation and Learning Plan.

Population Modeling and Simulation: Sport England are working with suppliers to produce more direct estimations of the contribution of the investments Sport England make in relation to the four strategic aims at a population level. The data captured locally through a Place's Evaluation and Learning Framework will be utilised to populate the data modelling and simulation tool. Places may be asked to support capturing data in addition to what is in the Evaluation and Learning Framework to assist meeting data requirements needed to produce estimations.Local places may be asked to participate in data modeling and simulation discussions which enhance the model and the estimations produced as a result.

Place evaluation and learning asks in line with investment cycle

The PELA has a progressive and proportionate 'ask' as Place Partnerships move from Development to Full award, details of this can be found within your award agreement and conditions.

	Theory of Change	Evaluation and Learning Plan	Local Place Evaluation and Learning	Index of examples	Spring Evaluation and Learning Submission	Autumn Evaluation and Learning Submission	System maturity assessment and survey submission (Participation in CCA)
Full and Deepening Award	✓	✓	✓	✓	✓	✗	✓
Development Award participating in CCA	✓ Developing	✓	✓	✓	✓	✗	✓
Development Award not participating in CCA	✓ Developing	✓	✓	✓	✓	✓	✗

When resourcing evaluation and learning locally, ensure the evaluation partner understands the Sport England requirements of the place and designs the evaluation together, according to this. This is fundamental to an aligned evaluation.

5. Evaluation models – purposes, benefits and challenges

In place-based or complex work, evaluation cannot be treated as something separate or left until the end, because its main use is to inform ongoing decision making.

Your approach will be unique to your place, shaped by your capacity and available resources for evaluation. It's important to remember that evaluation is everyone's responsibility. Regardless of the model, everyone should have some role in evaluation. Building the evaluative practice of the team to some degree should be part of every evaluation model.

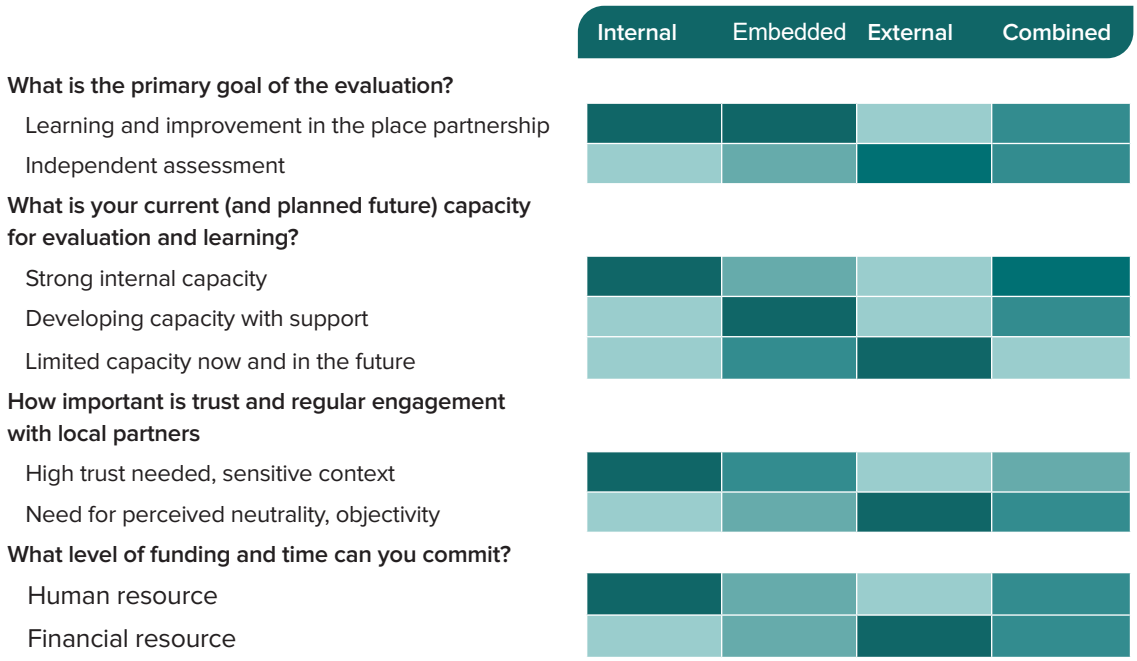
There are NELP resources and monthly sessions on the Evaluating Complexity website, a How and Why Hub led by evaluation partners in places (How and Why hub sign up form) and courses (both paid and free) on UK Evaluation Society (also where UKES Guidance on Commissioning Evaluation can be found), alongside more formal methods of training.

When planning an evaluation approach, it's important to consider not only who will lead the work, but also how the model supports learning, capacity building, and action. The table overleaf provides an overview of four evaluation models—Internal, Embedded, External, and Combined—with a focus on their purpose, potential benefits, and challenges.

	1. Internal Model	2. Embedded Model	3. External Model	4. Combined Model
Purpose	To build evaluation capacity and capability across and within team roles, making evaluation a routine and sustainable part of practice.	To blend internal and external perspectives by embedding an evaluator or learning role within the team, supporting both capacity building and reflective practice.	To bring in independent expertise and structure to lead the evaluation, often where internal capacity is limited or an external perspective is needed.	To integrate internal and external roles, combining local knowledge with external expertise to support both robust data collection and meaningful learning.
Potential benefits	• Upskills the team and embeds evaluation as part of the role. • Can be more cost-effective over time. • Builds sustainable, locally owned evaluation capacity. • Evaluation may resonate more by local partners. • Can be more responsive to local needs and priorities.	• Builds internal capacity while bringing in external expertise. • Supports learning-to-action cycles and reflective thinking. • Can act as a "critical friend," helping teams problem-solve and adapt. • Facilitates co-production of reports and learning sessions. • Often flexible and able to build strong relationships with partners. • Helps foster a culture of learning and continuous improvement.	• Offers specialist skills and an independent viewpoint. • May be perceived as more objective and trustworthy. • People may feel more comfortable sharing honest feedback. • Can provide training or capacity support (e.g., "how and why" sessions). • May have greater capacity to collect data from a broader range of stakeholders.	• Brings together trusted local insight and independent evaluation. • Supports both systemic and place-based learning. • Can enhance the credibility and utility of evaluation findings. • Facilitates action based on trusted, co-produced insights. • Builds internal capacity while benefiting from external support.
Potential challenges	• May lack external perspective, risking an echo chamber. • Capacity constraints may limit effectiveness, especially during busy periods. • Teams may not initially have the necessary skills—training takes time. • Evaluation may be de-prioritised without dedicated roles or leadership. • It can be difficult to raise critical issues when working closely within the team.	• Can be resource-intensive due to the time required for embedding. • Requires mutual trust and clarity of role to balance internal/ external dynamics. • May still face challenges in surfacing difficult issues due to relationship sensitivities. • Developing a learning culture takes time and consistent effort.	• May struggle to fully understand the local context and dynamics. • Can be less effective at supporting sense-making and learning for action. • Relationship-building and engagement may be more difficult. • Can be costly relative to the time and depth of involvement. • Trust and openness may vary—some may be more or less honest with an outsider.	• Can be more resource-intensive and complex to manage. • Requires strong alignment and collaboration between internal and external partners. • May increase demands on stakeholders' time and attention. • Coordination and prioritisation can be challenging across multiple roles.

How do I choose?

There is no right or wrong model, each offers different benefits. Some of which will depend on your budget, local preference and what the key purpose of your evaluation is. Choosing between evaluation models depends on several key factors related to your context, goals, and resources. Here are some questions to help guide your decision.



6. What should an evaluator do and how can we work in alignment?

While planning for evaluation and learning it is important to outline the expectations and roles of all parties. If an externally commissioned evaluation partner is going to be commissioned this should happen prior to contracting. Engaging with the UK Evaluation Society Guidelines for Good Evaluation Practice is recommended in this process.

Evaluation partners can be commissioned **externally,** the main aim is for an evaluation that **aligns with complexity sensitive, place-based approaches. Evaluation in a complex system remains everyone's responsibility** because everyone can have a role in capturing data e.g. reflections, and using the evaluation findings.

Building on the guiding principles for evaluation (see Section 2), the following provides additional guidance on the *ways* in which an evaluation partner can work alongside you when externally commissioning.

You should work together with your evaluation partner to:

- Understand and align your learning culture and learning processes/structures in place.
- Outline a clear framework and methodologies.
- Refine and prioritise evaluation questions
- Use appropriate methods which are linked to your evaluation questions. These questions should focus on how and why change happens or the impact of change.
- Set up clear channels of communication between evaluation partner and delivery teams and regular moments to reflect together.
- Ensure all stakeholders inform the evaluation process and cycles of learning to action.
- Consult and agree on what data to collect and provide critical support for who to include.
- Share data in a timely way for ongoing use to support cycles of learning and action.
- Value and develop inclusive, creative ways to engage with a diverse range of stakeholders, including residents, volunteers, community workers, the workforce, and policymakers.

The evaluation partner should use appropriate evaluation methods. The table below is not an exhaustive list, but give a flavour of some methods commonly employed.

Method	Benefits of the method, including considerations for use
Qualitative interviews and focus groups (open questions, in depth discussions)	• Familiar, lots of skilled practitioners and training available. • Can add additional prompts to ask interviewees to explain how and why change may (or may not) be occurring.
Quantitative interviews (surveys, typically closed questions)	• Familiar, lots of skilled practitioners and training available. • Can be used to gather views of multiple people simply and cost effectively. • Unlikely to be sufficient, alone, to evaluate change.
Frequency counts of tangible changes	• Can illustrate examples of systemic changes and instances of changes such as 1) strengthened support for physical activity (e.g. via policy or practice audit), 2) resident influence and decision making (e.g. meeting minutes), 3) new opportunities for physical activity (e.g. provision audit, Moving Communities platform, Active Lives data), 4) increased participation (e.g. registration lists). • Frequency counts, alone, are insufficient for the evaluation and should be aligned to other data and narratives that explain how the work of the Place Partnership has contributed to such shifts.
Capturing observations (for example of meetings and workshops)	• Helps spot changes in how people relate, trust, understand, and work with each other, that other methods may miss. • Anyone can do it to support individual or team reflections.
Using creative engagement methods [1] in evaluation and learning	• Creative, fun and interesting ways to encourage people to be involved in the evaluation and value being part of it. • Supports the development of new skills and confidence in evaluation.
Story-telling approaches [2] including methods of condensing and sharing onwards such as 'Most Significant Change' and 'Letter to My Former Self'	• Supports the participant to provide data that is truly authentic and rich in detail. • May need some prompts to explore underlying thoughts and feelings. • Generates a lot of data, analysis methods and consent for onward sharing need to be considered early on.
Capturing influence within local networks e.g. through Social Network Analysis [3]	• Supports the capture and understand the connections between people, groups and organisations within a complex system. • Complementary data may indicate the strength and direction of relationships and the extent to which partnerships are maturing towards productive new ways of working.
Capturing multiple effects of key actions e.g. through Ripple Effects Mapping [4]	• A participatory method which can bring multiple stakeholders together to capture the wider effects of a key action, project or programme within the PBSA. • Can be supplemented to generate an explanation of how and why change occurs, using a realist approach.
Realist evaluation and synthesis	• A theory driven approach which seeks to understand why, for whom and in what contexts, something "works", or doesn't. • The PELA is underpinned by a realist philosophy, using lay language 'explanatory thinking'.

Method	Benefits of the method, including considerations for use
Configurational comparative analysis	• Supports Place Partners to understand what combinations of things produce outcomes. • NELP use this method to undertake the cross-place evaluation, but it can used locally to explore patterns via the free software, EvalC3.
Social return on investment	• Social return on investment is used to translate complex social outcomes into economic value. [5] • Despite its appeal to decision makers, users should consider limitations including: oversimplifying complex change, reliance on linear cause-effect assumptions, undermining efforts to engage underserved populations, if these do not link directly to cost savings, short term horizon bias (where systemic impacts take longer to emerge), data gaps. • If used should be alongside other methods and include co-benefit framing and proportionate ROI.
Learning and adapting	• Specific methods and processes can enable individual, team, organisational and Place Partnership learning. Important to create the conditions for learning.

[1] As an example, Together an Active Future (Pennine Lancs) have put together a toolkit for creative ways to engage with local partners and residents. These could generate data for your evaluation depending on the evaluation questions you are asking. https://taaf.co.uk/wp-content/uploads/2022/03/Creative-Engagement-Toolkit.pdf

[2] As an example, You've Got This (South Tees) have used story-telling in evaluation to engage residents in a way which feels authentic to them, and to provide powerful narratives to support other evidence of change. https://youvegotthis.org.uk/using-storytelling-in-evaluation/

[3] As an example, Get Doncaster Moving, have used Social Network Analysis to understand the connections between people, groups and organisations with their Place Partnership over time. https://getdoncastermoving.org/resource-library/4042

[4] Multiple Place Partnerships have explored the use of Ripple Effects Mapping and providing resources including: JU:MP (Bradford) https://arc-w.nihr.ac.uk/training-and-capacity-building/arc-west-courses/introduction-to-ripple-effects-mapping and Together an Active Future (Pennine Lancs) https://taaf.co.uk/wp-content/uploads/2024/04/REM-for-Development-.pdf. Essex Place Partnership have expanded this to include explanations of change. https://bmcmedresmethodol.biomedcentral.com/articles/10.1186/s12874-024-02371-7

[5] Sport England have commissioned research improved health from participation in sport and physical activity relieves pressure on the NHS through £10.5 billion a year in health and social care savings. https://www.sportengland.org/news-and-inspiration/sport-and-physical-activity-generates-over-100-billion-social-value.

Together with an evaluation partner you *could*:

- Support people in place to make sense of data collected and how it could inform your approach.
- Contribute to process learning meetings and report writing or align reports to support your work.
- Have a shared understanding of the NELP approach and, ideally, align with the NELP conceptual model and conditions for tackling physical activity inequalities.

7. How to prepare an evaluation brief

Sport England have prepared a template that can be adapted for engaging an evaluation partner to support your Place evaluation and learning approach.

Reminder: If you use the following guidance, please make sure you are still in compliance with your organisation's procurement policies.

Some considerations of what to include when writing an evaluation brief

Summary of the project goals and expected deliverables: This will give the partner an overview of the project, what you hope evaluation and learning will look and feel like in practice, and how the prospective learning partner could support it.

Key dates and milestones within the evaluation duration: Aligning the evaluation to support Sport England Evaluation and Learning Report and System Maturity Matrix Survey submission requirements.

Market engagement: To share and test out ideas and thinking with prospective suppliers and gain their feedback.

Other involved parties: You may be commissioning more than one evaluation partner or organisation as part of the work which will help any prospective evaluation partners to plan for multiple lines of communication.

Timeline: Anticipated milestones will help to visualise tangible benchmarks throughout the evaluation process, such as 6-month report or bi-monthly evaluation meetings. These should have some level of flexibility with the successful evaluation partner but enable progress to be tracked by both parties.

Deliverables: Expected and desirable deliverables of the evaluation can be stated at the start of the procurement process. Ideally this would include who for and what purpose it is serving. Invite ideas from the supplier. We recommend flexibility around the methods and approaches taken to suit the needs of your evaluation.

Payment schedule: Clear communication about the expected payment structure upfront will allow for applicants to budget appropriately to ensure financial constraints do not limit the evaluation.

Share your initial Theory of Change or Evaluation Framework (if you have this): A Theory of Change even in an early form, can help the evaluator understand how you think the place-based systemic approach will work and will give some clues to the types of data that might be collected. A more detailed evaluation framework can help the evaluation partner identify appropriate methods and understand roles and responsibilities. It is important to be aware of what you want to understand from the evaluation data.

Digging deeper: You could outline expectations of 'sense-making' and collaborative exploration of findings, with a focus of how and why things are, or are not, working in your project or area of work.

Mitigating risk: Evaluation of place-based and whole of system approaches requires complexity-sensitive methods, which can present risks and challenges in acquiring data. Aim to clarify the support your organisation can offer to mitigate risks, either through capacity from your organisation (helping to organise data collection) or additional funding (e.g. for outreach, hosting local data collection workshops, or providing translation services).

Compliance and legal considerations: Summarising any relevant legal and ethical requirements or contractual obligations is important to ensure that the evaluation is compliant. Be sure to outline Intellectual Property, who owns what and how it can and can't be used.

Stakeholder reporting: Identify what the findings will be used for and who they will be shared with (could inform appropriate methods). You may wish to advise on specific methods to help the evaluation partner budget appropriately.

Artificial Intelligence: Consider what may be welcomed and of interest, and what would not be desired. If needed liaise with Sport England on current policy. As prospective Partners/Suppliers to disclose their use of AI.

When meeting with potential evaluators, there are some questions you may wish to ask (market exploration meeting)

- How might you create an understanding of the local place and the context?
  For example, discovery sessions, attending group sessions, visiting sites and people.
- How could you build relationships with people to gain buy in, local understanding and collect data?
  Evaluators may want to meet people they are working with, they may work through community connectors or trusted staff recognising they aren't best placed to collect data.
- How could you involve different stakeholders and perspectives in the evaluation – particularly including local people, for instance residents, programme delivery teams, managers, senior leaders?
  Evaluation partners can be a critical friend who can challenge existing practices / language / accessibility / approaches for local people.
- What evaluation methods do you commonly use, and how do you adapt these to what we want to learn or find out?
  For example, if it is important for you as a place to understand what has been important for communities, someone with experience of working with communities on stories of change might be appropriate.
- How might you support us in place to interpret and use the data that is collected?
  Sense making sessions, reflect on language/terminology, offer to explain findings, previous examples of this.
- How would you build evaluative capacity of people in the place?
  Any local training offered, any reflection sessions?
- This is a complex initiative with many moving and interacting parts. How would you make sense of these individual parts, and connect with the wider work?
- How do you create a clear understandable evaluation framework?
  This does not have to be a traditional MEL framework.
- How would you present, share and disseminate learning from the evaluation?
  Do they speak to sharing information in different formats, supporting you to have group sessions to interpret the data?

Maximising your budget

The different models highlighted in Section 5 will have different cost implications.

Consider strengths and opportunities that already exist within your Place Partnership. Perhaps you are in contact with local universities who may have students who can get involved in data collection. Are the Local Authority/ies involved in your Place and have data analysts or equivalent who collect local place data which you can use or contribute to the planning, for example by including questions on an existing survey.

Alongside the direct budget for data collection, consider the costs associated with capacity building the wider team to engage with the evaluation and learning. Think about facilitation support and plans to share findings.

Considering the evaluation governance

Establish a steering group or advisor panel to oversee the evaluation. This could include internal staff, partners and community representatives. This may present an opportunity to include others who are not directly involved in the work, to offer an external perspective. Define clear roles and responsibilities for decision-making, especially in combined or embedded models. Ensure ethical oversight and data governance are in place.

Procurement

An internal model may not require formal procurement but should follow internal HR or role assignment processes.

Embedded/External and Combined models are likely to require procurement. Discuss with procurement professionals the options that support partnership working - this might include co-producing contract management / performance metrics, methods for agile budgeting, and re-profiling according to how the work develops over time. Consider the rules and flexibility offered by Place Partners to host the procurement and subsequent evaluation capacity. Give time for this process.

Develop a clear brief or specification - see template.

Decide on the procurement route - open tender, framework, direct award or invitation to quote (open or closed tender would be dependent upon if there is a preference for a closed procurement over an open tender which is what should happen when over a threshold of funding).

Include criteria for value for money, not just the lowest cost.

Where to advertise/look

- Academic evaluators: Post on academic networks (e.g. JISCMail, ResearchGate, university partnerships).
- Independent consultants: Use platforms like LinkedIn, Evaluation Support Scotland, UK Evaluation Society, or local networks.
- Embedded roles: Consider secondments, fellowships, or partnerships with universities or think tanks.

There are a series of key considerations to take when advertising an evaluation (and learning) tender to prospective suppliers.

1. To source prospective suppliers from partners e.g., locally and from other Place Partners who may be appropriate for the type of contract being procured
2. To publish via portal or framework (if there is a research/evaluation one) and encourage interested suppliers to sign-up to it to be made aware once published
3. To promote/advertise the tender where evaluation and learning suppliers are likely to be made aware of the opportunity e.g., through UK Evaluation Society and evaluation forums, groups and networks
4. To promote/advertise the tender through forms of social media/media outlets in line with organisational policy e.g., LinkedIn, Twitter and who you maybe able to tag to increase reach/ visibility of the tender

In addition to routes to promoting the evaluation tender, hosting a market engagement session early in the procurement process can be helpful for making the market aware of the procurement, to share initial ideals and costs, and gain market feedback which can then be used to enhance the tender that is then published, and increase potential interest from a range of suppliers in tendering for it.

Assessing bids

Use a scoring matrix with weighted criteria such as:

- Understanding of context and purpose
- Relevant experience and expertise - could refer to the American Evaluation Association Evaluator Competencies Framework
- Approach to learning and capacity building
- Equity and inclusion
- Cost and value for money
- Ability to work relationally and flexibly

Tender evaluation criteria

Topic	Description
Understanding of the Brief	Has the supplier/consortium accurately interpreted key background and context, along with the objectives/requirements of the contract. Their interpretation of the brief is likely to be foundational in informing their response to fulfilling contract objectives/requirements, and therefore if it is appropriate or not.
Knowledge, skills and experience	Has the supplier/consortium the right type of knowledge, skills, and experience to be able to fulfil the objectives/requirements of the contract. This could be in relation to particular evaluation and learning methodologies and methods, and taken forward in ways which correspond with important principles and values and contextual information shared in the tender documentation.
Approach and methodology	Has the supplier/consortium articulated a clear approach and/or methodology to guide how they will fulfil the contract objectives/requirements, with clear rationale for why this approach and/or methodology over others. Does the approach and/or methodology correspond with important principles and values and contextual information shared in the tender documentation.
Principles and Ways of working	Has the supplier/consortium articulated clear ethos, principles and values, and applied them throughout their tender responses to show how they guide their ways of working. This is important to be able to make judgement on if, and how, the ways of working correspond with the place-based systemic approaches.
Project and Relationship Management	Has the supplier/consortium articulated a clear approach to project Management (and relationship management) which gives confidence that they are able to manage the type of contract being tendered. This is important to be able to establish if the project management approach and considerations to relationship management correspond with place-based systemic approaches.
Improvement and Learning/ Learning Culture	Has the supplier/consortium articulated how they will contribute to continuous improvement and learning, or to supporting learning cultures. In addition, has the supplier/consortium articulated how they are committed to continuous learning and improvement, and with you as a partner. This is important as cycles of learning and action is a condition of place-based systemic working.
Communication and Language	Has the supplier/consortium articulated clearly how they can communicate, create communications and use accessible language which can support the dissemination and use of evaluation findings and learning for different audiences and purposes. This is important as day-to-day communicating about place-based systemic working, and producing communications in different formats for different purposes is a key to facilitate use of evaluation and learning to support action.
Risk and Mitigations	Has the supplier/consortium been able to identify key risk and mitigations based on their responses to tender questions and from their interpretation of the tender documentation. This is important for understanding how they approach and identify risk and ideas in responding to risk and problem-solving.
Building Capacity in Evaluation and Learning	Has the supplier/consortium the knowledge, skills and experience, along with the approach and methods to facilitate building knowledge, skills and confidence in understanding, applying and using evaluation and learning.

Example questions

1	**About You – Roles, Team Experiences, and Project Management – This question is worth 20%**
	Max 6 A4 pages, Font size 12

Please provide evidence that demonstrates your knowledge, experience, and expertise in delivering, and managing, the approach outlined in your response. Your answer should be written in plain, accessible language, and include but not be limited to:

- Your team, the composition of it, including specific roles, and how they link to fulfilling the aim and objectives of the contract.
- Staff biographies, including relevant skills, knowledge, expertise, and experience in relation to the role and responsibilities they will have in achieving the aim and objectives of the contract.
- Your knowledge, experience, and interest in place-based systemic work, with reference to application in health, care and/or physical activity and sport disciplines.
- Knowledge and experience in using QCA in research and evaluation, including links to relevant publications/conferences where applicable.
- Examples of delivering previous and/or current projects which reflect the objectives and overall aim of this Specification.
- Examples of working with people with protective characteristics and/or experiencing intersectional inequalities.
- Examples of working with staff in organisations taking forward place-based/whole-of-systems approaches.
- Examples of working with senior strategic leaders in national organisations and/or governmental departments who have different interests in place-based or whole-of-systems approaches.
- Clear articulation of your approach to project management in delivering the contract, with reference to specific roles and responsibilities of the team.
- Explanation of how a consortium bid would work, if applicable.

2	Communicating, Disseminating, and Using Findings – This question is worth 20%
	Max 6 A4 pages, Font size 12

The way we choose to communicate, the language we deploy and the methodologies we utilise to share are critical in reaching and engaging the diverse audiences required for conducting QCA and in making sure they can interpret findings and turn this into action within their work. Please provide an overview of your experience in, and approach to, engaging and communicating with a range of stakeholders in evaluation, and facilitating their sense making, learning, and action. Your answer should be written in plain, accessible language, and include but not be limited to:

- Your approach to engaging and communicating with different audiences in building their understanding of QCA, and how it can assist and support them in their work. Audiences include national organisations, LDPs, other sectors and cross-disciplinary partners, academics, and DCMS.
- Your approach to engaging diverse stakeholders in making sense of the findings from the QCA impact evaluation and using them, both locally and nationally.
- Your approach to facilitating sense making, use, and communication of the findings to wider audiences who are not directly involved in the QCA impact evaluation.
- The type of infrastructure, processes, tools, networks, and strategies which can facilitate and foster engagement towards, and acting on, the findings within local places, Sport England [e.g., strategic staff and senior leaders] and with DCMS. This can also include fostering learning whilst doing the QCA impact evaluation.
- Outlining of the specific theories, frameworks, methodologies, methods, and tools, if applicable, which will guide how you will communicate with key stakeholders, facilitate sense making, and use of findings.
- Providing examples, where appropriate to do so, of outputs you have produced and activities you have delivered that demonstrate innovation and effectiveness in communicating complex findings within simplicity and engaged key audiences of interest.

Top tip: Include an interview or presentation (or workshop) stage to assess fit, especially for embedded or combined roles where relationships are key. (add in -) also creating opportunity for wider partners who are likely to work with/be impacted by this procurement the opportunity to be involved in the procurement process and have input into who is awarded the contract/recruited.

3	The presentation is an opportunity for post-tender clarification. We reserve the right to adjust the Technical Scoring if following Q&A a concern is addressed, or new concerns arise regarding the quality of the proposal.

The top three scoring tenderers (subject to passing a minimum Technical Response score of 50%) will be invited to give a presentation in support of their bid. This will include an online presentation to a Sport England panel to summarise your proposal, set out your credentials and explain how you would approach this work (30 minutes). This will be followed by a question and answer session (30 minutes) with the panel, which is an opportunity for you to clarify any points that have arisen from your written submission and your presentation.

Supporting information will be made known to the Tenderer at least one week before the Presentation date. The presentation agenda and request will be the same for each Tenderer invited to this stage.

8. Examples based on Place Partnership work

Case study: Embedding evaluation through an internal insight role in a place-based team

In response to growing needs for integrated learning and reflective practice, a local council established a dedicated internal role within its Place team—appointing an *Insight and Evaluation Manager.* This role was created to strengthen internal capacity for evaluation and learning, particularly in the context of a partnership with Sport England.

The Insight and Evaluation Manager plays a pivotal role in bringing together insights from diverse areas of the council's wider work. By synthesising local learning, the role ensures that knowledge is not siloed but instead contributes to a shared understanding across teams and projects. A core component of this approach involves leading monthly reflection and sense-making sessions, where the Place team and key stakeholders come together to review progress, identify themes, and adapt practices accordingly.

Beyond facilitating internal learning, the role also fulfils an important external reporting function. The Insight and Evaluation Manager is responsible for meeting Sport England's evaluation requirements, including the production of the Evaluation and Learning Report. This report is developed collaboratively with partners, ensuring it reflects the collective learning from the programme rather than a top-down account.

Crucially, the role has also focused on engaging council leadership, working to embed a culture that values and acts on evaluative thinking. By championing the importance of insight-driven decision-making, the Insight and Evaluation Manager is helping to position evaluation as a strategic tool within the organisation, rather than a compliance exercise.

This case demonstrates how creating a dedicated internal evaluation role can support cross-sector collaboration, enhance learning, and promote a more reflective organisational culture.

Case study: Academic-led learning support embedded in a Place Partnership

In an innovative approach to place-based learning and evaluation, a university-employed researcher was embedded directly within a local Place Partnership team. Alternatively, in some contexts, this role may be filled by someone employed by a local partner organisation with an honorary affiliation to a university—blending academic insight with local knowledge and relationships.

Positioned within the core team of the Place Partnership, the researcher played a hands-on role in the learning and evaluation process. They actively supported weekly process learning and reflection meetings, helping the team pause, reflect, and adjust their actions in response to emerging insights. Their presence ensured that learning was not treated as a separate function but integrated into the team's ongoing work.

Beyond structured reflection sessions, the researcher also attended key events and activities, adopting an observational role to understand how change was unfolding on the ground. This participatory approach enabled them to provide timely feedback to partners and offer a healthy level of constructive challenge, helping the team surface tensions, explore different perspectives, and solve problems collaboratively.

A central responsibility of this role was leading the development of the Evaluation and Learning Report—a comprehensive synthesis of insights, outcomes, and reflections from across the partnership. To inform this, the researcher conducted interviews with a wide range of stakeholders, including local community members, ensuring that the evaluation captured diverse voices and perspectives. These interviews were guided by shared research questions developed in partnership with the team.

This model demonstrates the value of embedding academically grounded roles within place-based initiatives. By combining rigorous inquiry with day-to-day collaboration, this approach supports deeper understanding, adaptive learning, and a more inclusive evaluation process that reflects the lived realities of those involved.

Case study: Commissioning external evaluation partners to support place-based learning

Across different Place Partnerships, commissioning external evaluators has offered a valuable route to embed learning and reflection—particularly when internal capacity is limited or specialist expertise is needed. Two contrasting models illustrate how external support can be tailored to different levels of resource and ambition.

Example 1: High-Resource External Evaluation Model

In this example, a Place Partnership invested in a comprehensive external evaluation, contracting a specialist partner to support both strategic design and ongoing learning. The foundation of the work centred around developing a Theory of Change, helping the partnership articulate its priorities, intended outcomes, and pathways to change.

The evaluation partner worked closely with the team to:

- Develop and refine the Theory of Change.
- Identify priority areas of focus.
- Select suitable evaluation methods tailored to each area of work.
- Design and implement a practical evaluation strategy.

Key evaluation activities included:

- **Regular surveys** to monitor shifts in relationships and networks supporting physical activity.
- An **appreciative enquiry process** with local communities, co-delivered with health sector "community connector" roles, to explore local assets and priorities.
- Targeted evaluation of themed projects, such as promoting **active travel** and **enhancing green space** access.
- Use of **social network analysis** to assess system-level change.

Importantly, the evaluation partner did more than collect data—they played a formative role by facilitating ongoing reflection sessions with staff, surfacing process learning and supporting iterative adaptation. Evaluation priorities and the Theory of Change were revisited periodically and formally reviewed ahead of re-commissioning, ensuring the approach remained relevant and grounded in evolving local realities.

Example 2: Low-Resource External Evaluation Model

In contrast, a second Place Partnership opted for a leaner model with lower resource allocation. Here, the external evaluator was contracted on the basis of a carefully written evaluation brief, which set out expectations for alignment with the programme's underlying conditions for change.

This evaluator focused on helping the team articulate programme theories and capture learning through accessible and participatory methods. Their approach included:

- Realist Ripple Effects Mapping to trace the impact of initiatives across different parts of the system.
- Stories of change to illuminate how and why outcomes were emerging.
- Facilitation of monthly process learning and reflection sessions, supporting the team to think critically and adaptively.
- Supporting internal teams to author their own Evaluation and Learning Reports, building internal capability over time.

Though smaller in scale, this model maintained a strong emphasis on evaluative thinking and reflective practice, ensuring the partnership could learn and adapt as it progressed.

Summary

These two examples demonstrate the flexibility of external evaluation support within place-based work. Whether engaging a high-capacity partner for full-cycle evaluation or bringing in focused expertise to supplement internal learning, external models can play a pivotal role in helping Place Partnerships reflect, adapt, and embed evidence-informed approaches in their ongoing work.

Combined model - Embedded evaluation and learning role AND external evaluation partner

In the combined model, an embedded evaluator spends time in regular meetings, steering groups, network meetings, at events with a variety of partners and communities to observe and facilitate thinking on how change is happening and what is supporting or hindering this.

- Embedded role also facilities monthly process learning sessions.
- Embedded role runs six-monthly learning and sharing workshops bringing partners together to highlight what is working or not, or what is changing.
- External evaluators work with the team to create theories and gather data from different perspectives.
- External evaluators deliver training to support people in place to gather data.
- Embedded evaluator supports workshops for collective sense-making and analysis workshops about external evaluation data, to create cycles of learning and action.
- The team in place are all regularly involved in shaping and being a part of regular reflections feeding into the evaluation and learning report.

9. Real-world reflections from Place Partners

Reflections from Sheffield on hiring an external evaluator

The National Centre for Science and Exercise Medicine (NCSM) and partners, who bring to life the Move More Strategy in Sheffield, were wanting to understand how and why change was happening and the impact from an area of work named Move More Connect. They wanted to procure an external evaluation partner who could gather data from the communities and health professionals involved in elements of this work'.

The first thing that's worth mentioning is that depending on the size and cost of the evaluation, some organisations would need to go through a tender process. We didn't but timescales wise, it's always slower having to go through appropriate due diligence.

The creation of a brief for the evaluators was initially challenging. There needs to be a balance with flexibility, whilst remaining clear on the key asks.

Having enough meetings and conversations with an evaluator has been helpful to better understand their approach and fit for the project. I would allow enough time to have these conversations and be able to go back and forth to help make sure the evaluator is a good fit.

It was difficult knowing where to start to look for evaluators, we used contacts from colleagues.

Reflections from Greater Manchester (GM) on the evolution to a hybrid model

The GM Moving evaluation approach to local pilot/place partner work has followed a hybrid model since its inception with an embedded internal team member within GM Moving and external contracted research partners to support the 11 localities involved in the GM place partnership. Over time, the ask of the evaluation team has evolved and can be split into 4 phases.

Phase 1: Contracted an external researcher partner to provide support to the 11 boroughs in the GM Local Pilot. These external researchers were embedded evaluators within a place and had a dedicated amount of time they spent building trusted relationships, supporting sensemaking, and attending meeting and events as directed by the locality place team. The external research partner also supported GM Moving team in designing and testing an approach to evaluating whole system change.

Phase 2: External embedded researchers focused on supporting the localities in mixed methods data collection to support and test the GM wide enablers of change, which were developed around the Place Partner work.

Phase 3: Move away from external embedded researcher approach. The external research partners embedded evaluation and learning capacity within localities and created local research ambassadors.

Phase 4: Looking forward to deepening, localities have identified what support they would like moving forward from the research partners. This has ranged from no or minimal support as localities feel they have capacity and confidence to manage evaluation internally, to additional training asks to increase internal capacity and further build evaluative confidence and skills.

What has been key throughout the GM place partnership is that evaluation and learning is viewed as essential to the work and is one of GM's four catalysts for system change. This means our hybrid evaluation team is viewed as part of the wider place partner team and not separate. This is reflected in the strength of the evaluation team's relationships with the localities and has allowed them to step back and allow research ambassadors to support.

The additional evaluation capacity provided from the hybrid model has been key to the mindset and culture change, where we have moved away from a 'prove and showcase' culture to a 'learn and improve' culture.