

Evaluation and Learning Plan Descriptor

A Guide to Understand and Fulfil the
Evaluation and Learning Plan Requirement

June 2026



This document provides guidance for Place Partners on developing an Evaluation and Learning (E&L) Plan – a requirement of Sport England’s Place Expansion Investment.

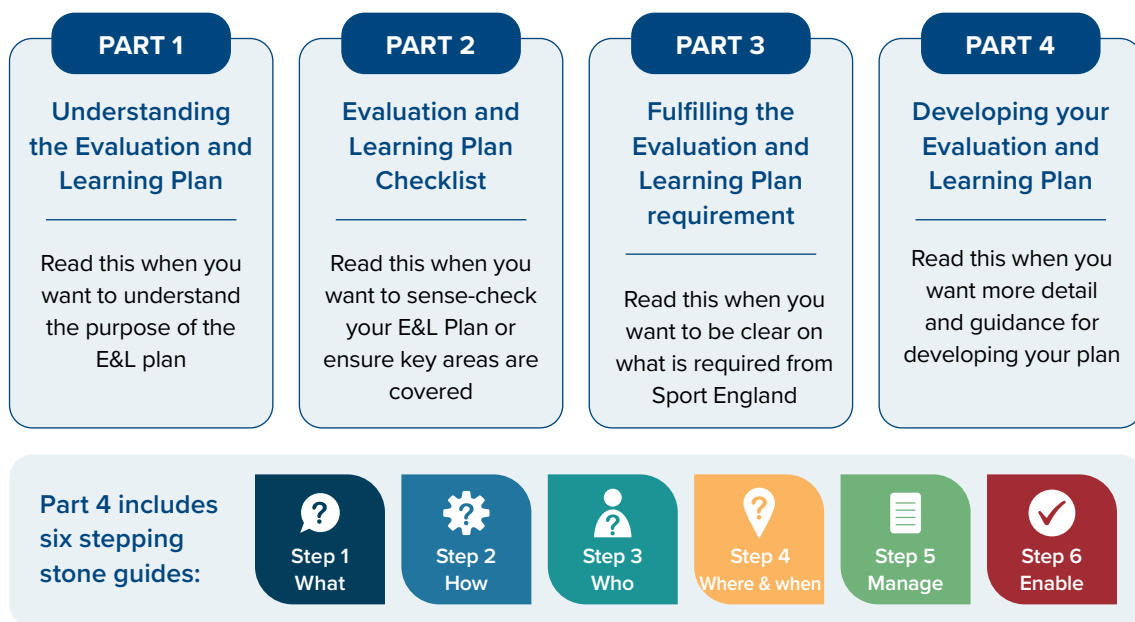
How to navigate and use this Descriptor document

This Descriptor is to guide place partners in how they design and deliver their Evaluation and Learning Plan as part of place-based systemic work. It is designed to be used flexibly — start where it is most useful for you and your partners.

If you are:

- **New to the Evaluation and Learning Plan** → start at Part One
- **Sense-checking your approach** → go to Part Two
- **Clarifying expectations** → go to Part Three
- **Developing and delivering your plan in detail** → go to Part Four

This resource is structured in the following way:



Supporting resources

The following resources are complementary to this Evaluation and Learning Plan Descriptor document in supporting the design, commissioning and management of evaluation and learning:

1. [The UK Evaluation Society: Guidelines for Good Evaluation Practice](#)
2. [The Centre for Evaluation Across the Nexus: Complexity Evaluation Toolkit](#)
3. [National Evaluation and Learning Partner: Place Evaluation and Learning Asset Mapping](#)

Part 1: Understanding the evaluation and learning plan

In a place-based systemic approach, multiple interconnected actions are often happening by a range of partners at the same time (see the [Conceptual Model](#) and the Nine Cross-Cutting Conditions). Together, these actions may or may not lead to change, and when they do, they do not always unfold as or when initially anticipated in the [Theory of Change](#).

Because change in practice rarely happens in straight lines, it is often unpredictable, and not always immediately visible. It can be difficult to isolate and attribute what is causing change. In reality, we cannot 'freeze' everything else that is happening in a place to observe if, and how, place-based systemic working reduces physical activity inequalities.

For this reason, approaches to evaluation that attempt to clearly attribute — to prove exactly what caused what — often miss much of what is really going on, and how the relationship between the multiple interconnected actions combine together and have influence on if, how, and why change happens.

A way forward is for evaluation and learning to be compatible and work with this complexity. By being able to follow when, where, and how, change happens over time and reveal what contributed to causing it. So that, place partnerships can build and share a credible picture of how they are contributing to reducing physical activity inequalities within their place.

The [Cycles of Learning and Action](#) cross-cutting condition provides guidance for doing this, and encourages Place Partners to:

1. Track the implementation of actions and the consequences of them within a place e.g., for people, communities, and partner organisations.
2. Prioritise (and place value on the time to) test and learn as part of the day-to-day work, together.
3. Routinely reflect to understand and make sense of the work, and of the evaluation findings as they occur.
4. Use evaluation findings to support individual and collective learning and taking action to strengthen aspects of the work, or in response to challenges and opportunities as they arise.

This matters because the points above signal a shift in both the ethos and purpose of evaluation, and a growing recognition that evaluation and learning are part of place-based systemic working. This means that how we evaluate and learn needs to be shaped by local place conditions, the priorities of partners, and what is asked to be shared with Sport England.

This is where an Evaluation and Learning Plan becomes important. It provides a guided way for partners to respond to this shift, and give confidence that their approach to evaluation and learning will be a strategic tool for their place-based systemic work. In doing so, meeting both local priorities for evaluation and learning and the asks of Sport England.

What an Evaluation and Learning Plan means in practice

An Evaluation and Learning Plan brings together, in one place, how Place Partners will evaluate and learn as part of their place-based systemic work.

As partners begin to develop their plan, they are often starting from existing ways of evaluating and learning. Through the process of developing an Evaluation and Learning Plan, partners are encouraged to step back and rethink these approaches — adapting them to better capture, and learn from, how change unfolds in more complex and connected ways.

Partners work together to agree what they want to evaluate and learn about, how they will do it, who will be involved, and where and when it will happen. This process is as important as the plan itself as it brings partners into a shared way of thinking about evaluation and learning from the outset which should then be embraced collectively.

Being clear on these **‘what, how, who, where, and when’** questions help partners organise their efforts and coordinate evaluation and learning within their Place.

As the plan is put into practice, it helps partners to understand what is happening, learn from their findings and experiences, and use these insights to inform decisions and adapt their work over time. In this way, evaluation and learning becomes part of how partners work together — not something separate.

Part 2: Evaluation and Learning Plan Checklist

This section provides a checklist for place partners to sense-check their Evaluation and Learning Plan against. It provides a high-level guide to the key areas they need to consider and work through to shape how evaluation and learning will happen within their place.

By working through the checklist, place partners will develop a plan that enables them to evaluate and learn from their theory of change in practice. Resulting in producing evaluation findings that can be used for multiple purposes, including learning, inspiring and influencing partners across sectors, informing action and decision-making, and fulfilling accountability and reporting requirements.

The Evaluation and Learning Plan should be produced as a practical guide for partners. This is likely to comprise a visual or structured representation of the plan (for example, a table, framework, or diagram), supported by a narrative that explains how evaluation and learning will happen in practice and be managed.

Evaluation and Learning Plan Checklist: A stepping-stone guide

Think of this checklist as a series of stepping stones. They can help partners to focus on the right areas, the process(es) that they follow, and whether it is producing what they need to build a clear, joined-up approach to evaluation and learning — moving from initial thinking through to doing and using evaluation and learning in practice.

Process: What partners work through together

Product: What this results in



Scoping

What can be evaluated and learnt about

A. Develop your [Theory of Change](#) (aligned to guidance)

A shared understanding of your work, expressed by a visual and narrative.

1

What do you want to evaluate and learn about

- A. Develop and prioritise evaluation and learning questions
- B. Define the ethos and principles to guide how evaluation and learning will look and feel in practice

Clear questions and guiding ethos and principles



2

How evaluation and learning will happen and be used

- A. Identify appropriate evaluation and learning methodology which are aligned to evaluation and learning questions, ethos and guiding principles.
- B. Select suited methods to:
 - Local context
 - Testing your Theory of Change
 - Supporting [cycles of learning and action](#)
 - Fulfilling local and national reporting requirements.
- C. Agree how data will be analysed and used to achieve points A and B

A clear and aligned approach to doing and using evaluation and learning



3


Who is involved and how

- A. Explore and agree evaluation and learning roles, responsibilities and ways of working between partners
- B. Identify any additional role(s) needed
- C. Agree on who, and how, the Evaluation and Learning Plan will be managed in practice

A shared understanding of who is doing what




4

Where and When evaluation and learning will happen 


<p>A. Agree where key evaluation and learning activities will happen</p> <p>B. Set the sequencing of when/how often evaluation and learning activities will happen</p>	<p>A clear and realistic schedule of where and when activities will happen</p>
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5

Managing and governing the Evaluation and Learning Plan 

<p>A. Agree how the plan will be managed and governed</p> <p>B. Design in regular reflection and review of the plan to adapt and improve it</p>	<p>A plan that can be actively used and adapted over time, and appropriately managed</p>
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6

Enablers for putting the plan into practice 

<p>For evaluation and learning to happen and be managed, identify:</p> <p>A. The structure, systems, processes, and spaces</p> <p>B. The evaluation skills and knowledge needed between partners</p> <p>C. The resources: shared financial, personnel and technology and tools</p>	<p>The enablers for evaluation and learning to happen as planned</p>
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Producing the Evaluation and Learning Plan: bringing it all together

<p>A. Bring all the areas of focus covered in the checklist together in a clear, shared format that works for partners</p> <p>B. Develop an accompanying narrative to explain the evaluation and learning plan and how it will work in practice and be managed</p>	<p>A plan for evaluating and learning from place-based systemic work for partners</p>
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Reviewing if your plan is ready for implementation

Once you have developed your Evaluation and Learning Plan, it is important to step back and review it together. This is an opportunity for partners to reflect on whether the plan is likely to work in practice — not just in theory — and to make any adjustments before it is put into action.

We encourage partners to actively review their plan against the questions under each of the following considerations, to strengthen its quality and increase the likelihood that it will work as intended in practice.

Acceptability: is there shared agreement and support for the plan?

1. Do partners understand the plan and what it is trying to achieve?
2. Is there commitment to working in the ways it sets out?
3. Do partners feel able and willing to take part in the ways set out?

Feasibility: is the plan realistic and deliverable in practice?

1. Can it be delivered within the time, resources, and capacity available?
2. Are roles, responsibilities, and ways of working realistic for partners?
3. Have practical constraints, risks and mitigations been considered?

Appropriateness: is the plan fit for purpose and relevant to your place?

1. Does it reflect local context, priorities, and ways of working?
2. Does it focus on what partners want to evaluate and learn about?
3. Does it meet both local and national reporting requirements?

Equitable: does the plan represent a diverse range of voices and perspectives?

1. Are a diverse range of people and perspectives meaningfully represented?
2. Does it support shared involvement and decision-making between partners and communities?
3. Are activities accessible and fair for those involved?

Quality of Evaluation and Learning: will the plan facilitate high-quality evaluation and learning to happen?

1. Are appropriate methods selected for the questions prioritised?
2. Will the methods be appropriately applied to collect and produce high-quality data?
3. Will partners have a meaningful and well-supported learning experience?

In addition to the checklist and review questions provided, the [Planning and Developing Your Evaluation Brief](#) resource is an important guide for partners working through commissioning for, or resourcing, evaluation and learning as part of place-based systemic work.

Part 3: Fulfilling the Evaluation and Learning Plan requirement

This section sets out what Sport England requires from place partners in fulfilling the Evaluation and Learning Plan, as part of the Funding Award Agreement with Sport England.

- 1. Process:** We are asking Place Partners to refer to the guidance suggested in Part 1, 2 and 4, and work with colleagues and partners to co-design a process and collaboratively develop an Evaluation and Learning Plan. Support will be available via your Place Relationship Manager, Sport England's Moving Communities team, other Places within your cluster or cohort, with resources and supports from the National Evaluation and Learning Partner website.
- 2. Product:** We are asking Place Partners to refer to the guidance suggested in Part 2 and 4, along with resources and support accessed from the National Evaluation and Learning Partner, to produce a table or diagram that sets out the Evaluation and Learning Plan in a format that works for Place Partners. Alongside the table we encourage a short description of each part of the plan. This narrative acts as a practical guide ("how-to manual") to help partners understand and engage with evaluation and learning as planned.
- 3. Resourcing:** Identify and plan the resources needed to carry out the Evaluation and Learning Plan, along with foundations and enablers needed, and to access additional supports provided by the National Evaluation and Learning Partner and through clusters and learning spaces.

We are asking Place Partners to not rush this process, and to plan and integrate developing the Evaluation and Learning Plan as part of your place-based systemic work.

Part 4: Developing and delivering your Evaluation and Learning Plan

This part supports place partners to work out how evaluation and learning will happen in practice as part of their place-based systemic work. It provides a structured set of framing questions for partners to use to work through and agree how they will determine:

- What they want to evaluate and learn about
- How they will do it
- Who will be involved and how
- Where and when it will happen
- How to manage and govern for evaluation and learning
- What is needed to enable evaluation and learning to happen as planned

To achieve this, our starting point is that place partners produce a [Theory of Change](#) as this helps to define what is in scope to be evaluated and learnt about.

From this point, we offer a stepping-stone approach, with each step framed by a structured set of questions or considerations for partners to use to work out aspects of their evaluation and learning plan.

The focus for each step is on what will work in practice — how evaluation and learning can be embedded into day-to-day ways of working, and how it will support the use of findings and learning. Therefore, the plan needs to include a diversity of perspectives and be shaped by your local context.



Step 1

What do we want to evaluate and learn about?

Purpose of this step

This step is about working out what you want to evaluate and learn about, and why, and how you want evaluation and learning to be approached in practice. It focuses on identifying shared priorities, turning these into clear questions, alongside defining the ethos and principles that will guide how evaluation and learning should look, feel, and happen day-to-day.

Together, this helps establish both the focus of evaluation and learning, and the way it will be carried out as part of your place-based systemic work.

The aim of this step is to ensure partners are aligned on what matters most to evaluate and learn about, why it is important, and the ethos and principles that will guide how evaluation and learning happens in practice.

This creates a shared foundation that defines not only what will be evaluated, but also how evaluation and learning should be experienced and used by partners.

Key considerations

To support completing this step, the areas below are provided as key questions and considerations for partners to reflect on and work through to define their focus and approach for evaluation and learning.

Establishing shared priorities and questions: what to evaluate and learn about, and why does it matter?

This includes:

- Mapping out and identifying what is important to evaluate and what the learning opportunities are, and why
- Turning these into shared **evaluation and learning questions**
- **Prioritising together** what matters most to focus on

Explore **why** each priority is important – what will it help partners to do, influence, or adapt and improve?

Evaluation and learning priorities and questions are likely to be informed by:

1. Evaluation purpose: What does the evaluation need to do?

- Testing and learning about key parts of the Theory of Change, including new or innovative aspects.
- Supporting the application of the [Cycles of Learning and Action](#) condition.
- Helping partners advocate for and leverage resources towards place-based systemic working.
- Identifying the evidence needed to inform decision-making and guide practical next steps.
- Understanding and reporting on change as it happens—showing progress and impact to give confidence to partners in this way of working.

2. Ethos and Principles: What does evaluation and learning look and feel like in practice?

- Define the ethos and principles that shape and guide how evaluation and learning will feel and happen in practice.
- Alignment with principles and values of place-based systemic approaches
- Reflect Sport England’s ambitions and principles for Evaluation and Learning in Uniting the Movement.

3. Evaluation and Learning in Practice: How evaluation and learning happens day-to-day?

Select methodologies that:

- Match your ethos and principles (e.g., realist, collaborative, equitable and/or culturally responsive approaches to evaluation).
- Facilitate working collaboratively, inclusively, and reflectively with partners.
- Embed evaluation and learning as part of place-based systemic working, rather than treating it as separate from it.

Key takeaway

By the end of this step, partners will have agreed on what to evaluate and learn about, the purpose of evaluation and learning, and set out the ethos and principles for what evaluation and learning should be like in practice.

This provides the foundation for the next step, where partners work together to decide how evaluation and learning will be done to answer these questions and deliver its purpose in line with the ethos and principles.



Step 2

How would we like to evaluate and learn?

Purpose of this step

This step is about working out how evaluation and learning will happen in practice. It focuses on translating the priorities, questions, and principles agreed in Step One into a clear approach.

This step defines the form and function of evaluation and learning in practice:

- Selecting methodologies and methods that will shape how evaluation and learning is carried out
- How what is selected aligns with, and will be embedded as part of, place-based systemic working
- Whether they are feasible and can happen within the available resources (e.g., personnel, budget, time, and tools/systems)
- How they align with and reflect residents' and partners' preferences for engaging in evaluation and learning, and sharing their experiences and perspectives
- How it results in producing the right types of data which fulfil local priorities and Sport England's evaluation and learning asks, as outlined by the Place Evaluation and Learning Approach.

The aim of this step is to support partners to make informed decisions about the approaches and methods they will use, so that evaluation and learning can fulfil its purpose, answer agreed questions, and reflect the ethos and principles set out in Step One.

Key considerations

To support completing this step, three overarching questions are provided to structure and guide what to reflect on and work through to define your evaluation and learning approach.

Question 1. *How will you evaluate and capture the right types of data?*

Approaches to evaluation and the methods selected should be selected based on how well suited they are to answering the evaluation and learning question, the evaluation purpose, and ethos and principles. We encourage partners to consider:

- **Realist evaluation:** as this is compatible with complexity, focuses on testing and refining the theory of change, and producing understanding of if, how, and why, place-based systemic ways of working contribute to reducing physical activity inequalities, when it happens.
- **Developmental evaluation:** as this is compatible with complexity, supports how to evaluate and learn in practice, and in using evaluation for learning and action.
- **Collaborative, equitable or culturally responsive approaches to evaluation:** as this is compatible with principles of place-based, systemic ways of working, and partner participation and involvement in evaluation and learning.

To support which data collection methods to use and how they are applied, we encourage partners to consider:

Consideration	Description
Fit with place-based systemic approach	Plan data collection so it fits and is embedded into the place-based systemic approach taken forward in practice
Methods that mirror partners' and participants' preferences	Methods that people want to participate in e.g., qualitative (storytelling, photovoice, ripple-effect mapping) or quantitative (surveys).
The right types of data to test Theory of Change	Collect the right types of data to test the Theory of Change, answer evaluation and learning questions, and support learning and reporting.
Meeting Sport England's Asks	Methods and data that fulfil the asks of Sport England's Place Evaluation and Learning approach.
Timing and data availability	Methods that can capture data at the right times so that is available when needed e.g., to support local reporting, sharing learning with partners and Sport England, and informing decisions and actions.

In considering the above, it is not as simple or sufficient to focus narrowly on measuring change in outcomes within a Theory of Change. It is important to take time to reflect on the Theory of Change to identify the different types of data needed, and ways of capturing that data appropriately, rather than follow the typical next steps, as depicted below.

Typical Next Steps	Encouraged Next Steps
<p>From producing a Theory of Change, the next discussion typically focuses on methods to measure change in outcomes within a Theory of Change.</p> <p>Whilst this may result in capturing data about outcomes, a sole focus on measuring outcomes does not evidence how, and why, your place-based systemic work which is contributing to the change in outcomes.</p> <p>Meaning, evidencing the causal relationship between your place-based systemic work and the outcomes captured, remains to be answered.</p>	<p>From producing a Theory of Change, partners reflect on their Theory of Change to consider the different types of data (both qualitative and quantitative) needed, and who from.</p> <p>This follows with exploring which methods are most appropriate for capturing that data informed by understanding of the local place context. This is to be able to test/explore and learn if the actions taken forward are contributing to changes within the Theory of Change. This results in producing data about outcomes and the pathways which have led to them, in line with the Theory of Change.</p> <p>This means, you are able to speak clearly and confidently about if, how, and why, change is occurring, and what aspects of the work is contributing to that. Resulting in more meaningful and usable data to support learning and inform action.</p>

Question 2: How will you facilitate and embed reflection and learning?

To make reflection and learning part of everyday practice, we encourage partners to consider:

Consideration	Description
Fit with place-based systemic approach	How will reflection and learning be embedded as part of place-based systemic working between partners. This also includes learning about evaluation, learning through doing evaluation, and from evaluation findings.
Methods that mirror partners' and participants' preferences	Use reflection approaches that match partner and participant preferences — individually and collectively — such as reflective practice, adopting social learning principles, or action learning.
Embedding learning and action	Plan how learning will happen and be shared so that it is used and valued. Ensure evaluation findings and learning are interpreted with partners, and applied to adapt and improve the work, address challenges, and in responding to opportunities as they arise.

This means defining the **processes, spaces, and activities** that will enable ongoing reflection, and identifying any **capacity-building support** – such as skills, resources, or facilitation – that will help embed it as a routine part of the work.

Question 3: How will you analyse data and produce and share findings to support learning, action, and fulfil reporting needs?

To guide your data analysis, synthesis, and sharing of findings for different purposes, we encourage partners to consider:

Consideration	Description
Partner Participation	Determine with partners how they will contribute to producing findings and tailoring them for specific purposes — e.g., building confidence in the work, influencing stakeholders, or encouraging place-based systemic ways of working.
Data analysis and synthesis for the Theory of Change	Plan how data will be analysed and synthesised to test the Theory of Change, answer evaluation and learning questions, and identify future evaluation priorities and where evidence needs to be strengthened. Ensure outputs are in formats that support Place Partners' understanding and decision-making.
Fulfilling Reporting Requirements	Align data analysis and synthesis with local and Sport England reporting needs, to fulfil local forms of reporting, along with 6-monthly evaluation and learning submissions, annual CCA participation, and midpoint and end of award impact reporting.
Sharing and Using Evaluation Findings and Learning	Decide how and when learning will be shared locally, with Sport England, and in other learning spaces. Agree preferred formats and channels for sharing updates, findings and learning with partners and people who contributed data, so they can be used to support their sense-making, learning, and action.

It is important to draw the connection that your plans for fulfilling reporting requirements, and sharing and using evaluation findings and learning, will directly inform the methods needed to analyse and synthesise data.

In summary, the choices made in this step will determine what types of data will be generated, and in what ways, how learning will happen, and how evaluation findings and learning will be brought together and used to support wider learning, inform decisions and action, and fulfil reporting requirements.

Key takeaway

By the end of this step, partners will have used the three overarching questions to reflect on and work through how evaluation and learning will happen in practice. These questions help partners make sense of what is needed and reach informed decisions about - how data will be accumulated, how learning will be facilitated, and how findings will be analysed, shared, and used.

This provides the foundation for the next step, where partners decided who will be involved, and how they will participate in these activities.



Step 3

Who will be involved and how will they participate

Purpose of this step

This step is about working out who will be involved, how will they participate, and what additional capacity is needed, to make evaluation and learning happen in practice. Building on the decisions made in the What and How steps, it focuses on clarifying roles, responsibilities, and ways of working so that evaluation and learning can be embedded as part of how partners work together in a place-based systemic way.

The aim is to move from design into delivery — ensuring there is a clear and shared understanding of who is doing what, how partners will participate in evaluation and learning activities, and how it will fit within their existing roles and ways of working needed for it happen.

Key considerations

To support completing this step, the areas that follow are provided as key considerations. Partners are encouraged to reflect on and work through these together to shape how they will participate in evaluation and learning and promote opportunities for increasing shared ownership over evaluation and learning in practice.

Consideration	Description
Integrated into roles and ways of working	How will evaluation and learning be integrated into partners' roles, responsibilities, and day-to-day ways of working informed by the part they play in the work, and their needs and interests?
Creating, enhancing and sustaining partner participation	How will opportunities for partners to be involved in evaluation and learning be created, enhanced and sustained over time? Including both shaping decisions and taking part in key activities (e.g. planning, data collection, analysis, sense-making, and using findings)?
Understanding and responding to changes in partners' contexts to evaluate and learn	How will partners' capacity (e.g. time availability, interests, and work priorities) be understood and reviewed so that their level of involvement is appropriate and realistic for them? How will evaluation and learning adapt and be responsive to this, including identifying where additional capacity may need to be grown or brought in to support the plan to be delivered?
Growing capability and buying in support	What knowledge, skills, and confidence do partners need to participate in evaluation and learning in the ways they want to? What support is needed to develop this (e.g. training, facilitation), and what additional capacity (e.g. external partners, new roles) may be required to take forward Evaluation and Learning as intended?
Coordinating and managing evaluation and learning	Who will be responsible for coordinating, managing, and delivering the Evaluation and Learning Plan (e.g. internal roles, external partners, or a combination)?

Working through these areas helps to define the 'team' of partners and/or external evaluation and learning support to do, use, and manage evaluation and learning as planned.

Key takeaway

By the end of this step, partners will have worked through who will be involved in evaluation and learning, how they will participate, and what roles, responsibilities, and capacity are needed to support this in practice.

This provides the foundation for the next step, to use the what, how, and who, to inform where evaluation and learning activities will take place, and when or how often they will happen to support learning, action, and reporting.



Step 4

Where and when will evaluation and learning happen

Purpose of this step

This step is about working out where and when evaluation and learning activities will take place in practice. Building on the What, How, and Who steps, it focuses on the practicalities of delivery — ensuring that evaluation and learning is organised in ways that can be carried out, participated in, and sustained as part of day-to-day work.

The aim is to translate earlier decisions into clear, workable arrangements by considering the settings, spaces, timing, and rhythm of evaluation and learning activities.

Key considerations

The areas below are key considerations. Partners are encouraged to reflect on and work through these together to shape how evaluation and learning will be delivered in practice.

Consideration	Description
Matching evaluation and learning activities to an appropriate setting	<p>Based on which evaluation and learning activity is happening, and who is participating, where is the best setting for that to happen?</p> <p>For example:</p> <ul style="list-style-type: none">• Data collection may happen in community settings or spaces people already use• Data analysis and synthesis may be led by specific partners and shared online or in person• Reflection and sense-making may take place in workshops, meetings, or informal spaces
Working with partner availability and preferences:	<p>How will preferences in relation to settings and formats (e.g. in-person, online, hybrid) be chosen to support participation and reflect how partners and communities prefer to engage?</p>
Sequencing evaluation and learning activities over time	<p>When will key evaluation and learning activities take place, and in what order, to support the generation of evidence and learning over time?</p>
Establishing frequency and rhythm	<p>How often will activities happen, such as:</p> <ul style="list-style-type: none">• Collecting, analysing, and synthesising data• Engaging in reflection and sense-making with partners• Sharing findings and learning locally, with Sport England, and in wider learning spaces

Aligning with priorities and requirements

How will timing and frequency of activities support the production of deliverables and outputs when they are needed by for different audiences and purposes?

For example:

- Local reporting and decision-making cycles
- Facilitating local learning and action
- Meeting national reporting deliverables
- Sharing what you are finding and learning with other partners and Sport England in different settings and spaces

Working through the where and when of evaluation and learning helps partners to organise how it will happen in practice — making it accessible, relevant, and part of everyday ways of working. It clarifies how and where partners will be involved, and establishes a clear and realistic rhythm for activities to take place.

As a result, evaluation and learning can become embedded as part of the work over time, with evaluation findings and learning used for learning, to influence and inspire partners, inform action, and fulfil reporting.

At this step, the [Planning and Developing Your Place Evaluation Brief](#) document is valuable for working through how to commission or recruit evaluation and learning capacity to implement the Evaluation and Learning Plan in practice.

Key takeaway

By the end of this step, partners will have worked through where and when evaluation and learning activities will take place, and how often they will happen in practice. This brings together the practical arrangements needed to deliver evaluation and learning in ways that are accessible, coordinated, and aligned with partners' availability and priorities.

This provides the foundation for the next step, where partners work out how evaluation and learning will be managed and governed in practice — ensuring it is coordinated effectively, supported over time, and used as a strategic tool for place-based systemic working.



Step 5

Managing and Governing for Evaluation and Learning

Purpose of this step

This step is about working out how evaluation and learning will be collectively managed and governed by partners as part of their place-based systemic work.

The aim is to ensure evaluation and learning is not owned by one partner or function, rather how it is collectively advocated for, governed, and used by partners to inform decisions, shape action, and strengthen how place-based systemic working happens over time.

Key considerations

The areas below are key considerations. Partners are encouraged to reflect on and work through these together to shape how evaluation and learning will be managed and governed in practice.

Consideration	Description
Establishing collective governance and coordination	<p>How will appropriate governance arrangements between partners be created to oversee, and coordinate, evaluation and learning to happen?</p> <p>This includes:</p> <ul style="list-style-type: none"> • Agreeing how evaluation and learning will be governed across partners • Clarifying how coordination will happen in practice (e.g. groups, roles, or shared functions) • Ensuring governance arrangements connect with and are embedded within existing place structures
Enabling shared responsibility and decision-making	<p>How will responsibility for evaluation and learning be shared across partners, and how will decisions about it be made collectively?</p> <p>This includes:</p> <ul style="list-style-type: none"> • Creating clear opportunities for partners to shape evaluation and learning priorities and approaches • Ensuring a diverse range of partners and perspectives are included in decision-making • Building shared ownership so evaluation and learning is something partners do together, not something done to or for them
Using evaluation and learning to inform the work	<p>How will evaluation findings and learning be actively used to inform decisions, shape action, and strengthen place-based systemic working?</p> <p>This includes:</p> <ul style="list-style-type: none"> • Connecting evaluation findings and learning into decision-making spaces • Supporting partners to interpret and make sense of findings together • Ensuring learning is used to adapt, improve, and respond to the work as it develops and opportunities as they emerge

<p>Creating feedback loops and flow of learning</p>	<p>How will evaluation findings and learning flow between partners to support ongoing sense-making and action?</p> <p>This includes:</p> <ul style="list-style-type: none"> • Establishing clear and timely ways of sharing information • Creating feedback loops between delivery, reflection, and decision-making • Ensuring learning moves across the system, not just within individual organisations
<p>Securing leadership and enabling adaptive governance</p>	<p>How will leadership support and governance arrangements enable evaluation and learning to be used strategically and adapt over time?</p> <p>This includes:</p> <ul style="list-style-type: none"> • Gaining leadership support to champion and use evaluation and learning to enable system change and working in a place-based systemic way • Ensuring governance arrangements are flexible and responsive to change • Building in regular review of the Evaluation and Learning Plan to adapt and strengthen how evaluation and learning is managed, happens and used

By working through this step, place partners will establish how evaluation and learning will be collectively managed and governed in practice. This enables shared responsibility across partners for decision-making, clearer routes for sharing and using learning, and agreed ways of working that embed evaluation and learning into how the place-based system is led and delivered. Importantly, this also influences how place-based systemic working is managed and governed in place.

Key takeaway

By the end of this step, partners will have agreed how evaluation and learning will be collectively governed and managed in practice, including how responsibility will be shared, how decisions will be made together, and how evaluation findings and learning will flow across the system.

This provides the basis for the next step, where partners identify the foundations and enablers needed to make this approach work in practice — ensuring evaluation and learning can be effectively implemented, managed, and governed as intended.



Step 6

Enablers for evaluation and learning to happen as planned

Purpose of this step

This final planning step is about identifying what needs to be in place for the Evaluation and Learning Plan to be successful in practice. It focuses on the practical foundations that enable evaluation and learning to happen as intended by the people who are involved in doing it.

The aim is to ensure that the people involved are equipped, supported, and have the right enablers in place for evaluation and learning to happen.

Key considerations

The areas below are key considerations. Partners are encouraged to reflect on and work through these together to ensure the conditions are in place to put the plan into practice.

Consideration	Description
Developing knowledge, skills, and confidence (capacity building)	<p>What knowledge, skills and support do partners need in order to meaningfully take part in evaluation and learning as planned?</p> <p>This includes participating in:</p> <ul style="list-style-type: none">• Understanding and applying evaluation approaches and methods• Engaging in reflection, learning, and sense-making• Contributing to data collection, analysis, and interpretation• Using findings to inform decisions and action <p>How will knowledge, skills, and confidence be developed over time, in ways that reflect partners' preferences, and when they need it?</p> <p>See UK Evaluation Society guidance on evaluation competencies.</p>
Establishing practical systems and processes	<p>What systems, tools, and processes are needed to enable evaluation and learning to happen in practice?</p> <p>This includes:</p> <ul style="list-style-type: none">• How evaluation activities will be coordinated and delivered• How evaluation findings and learning will be shared between partners• How learning will be captured, stored, and made accessible• Identifying existing systems which may need to adapt or new ones needed

Securing and aligning collective resources	<p>What resources are available across partners to deliver the Evaluation and Learning Plan?</p> <p>This includes:</p> <ul style="list-style-type: none"> • Financial resources (e.g. from investment awards or partner contributions) • Time and staff capacity within partner organisations • Access to skills, expertise, and infrastructure <p>This consideration involves reviewing whether resources are sufficient to deliver what has been prioritised, and to make the decisions about what is feasible within the available resource envelope.</p>
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By working through this step, place partners will identify, and incorporate into their planning, the knowledge, skills and types of supports which partners need, along with the processes, spaces, and tools for evaluation and learning to happen in practice. This ensures that partners will be equipped and supported, and that the delivery of the plan is feasible within available resources.

Key takeaway

By the end of this step, partners will have identified what needs to be in place for evaluation and learning to happen in practice, including the knowledge, skills, and confidence that need to be built across partners, and how this will be supported. It also clarifies the tools, processes, and spaces needed to deliver evaluation and learning.

Together, this ensures that the right foundations will be put in place for evaluation and learning to happen in practice, and that what does happen is achievable within the resources available.

Summary of the Stepping-Stone Guide

This section sets out how to co-develop an Evaluation and Learning Plan through six connected stepping stones. Together, these steps support partners to work through what they want to evaluate and learn about, how it will happen, who will be involved, and where and when it will take place.

The steps proceed with how the plan will be collectively managed and governed, and what needs to be in place to make it work in practice. This includes identifying the knowledge, skills, systems, processes, spaces, and resources needed to support delivery.

Working through these steps helps partners surface and address practical considerations early — including potential challenges such as capacity, funding, leadership support, logistics, and data requirements — so the plan is realistic, achievable, and more likely to work when put into practice.