WELLNESS EXPERTS | EVIDENCE PLANNING GUIDE

Plan an honest delivery review

Separate completed work, participant usefulness and longer-term outcomes.

USE THIS RESOURCE

Use when agreeing a proposed engagement. These categories help plan reporting; they do not establish that any programme has achieved an outcome.

Ask before collecting

1. What does the buyer need to know to decide whether to continue?
2. What can we record without unnecessary personal information?
3. Which claims would require stronger evidence than we can produce?

Separate three levels

1. Delivery: what was completed, when, by whom and against which agreed scope?
2. Usefulness: could participants understand and use the material or route, and what appropriate feedback was offered?
3. Outcome: what change is being explored, over what period, and what else might explain it?

Your working notes

Keep this copy for your use. Do not add private cases to shared programme materials.

WELLNESS EXPERTS | CONTINUED

Plan an honest delivery review

Agree a proportionate record

Choose only necessary measures and an authorised reporting recipient. Explain limitations. For a briefing, a completion record and voluntary feedback about clarity may be sufficient. A claim about school performance or health would need a suitable evaluation design and permissions beyond an attendance count.

Close the loop

1. Compare delivery with the original scope.
2. Record what should be retained, changed or stopped.
3. Confirm who owns each follow-up action.
4. Agree any continuation as a separate scope, with capacity and costs confirmed.

KEEP IN VIEW

Report what the evidence shows. Do not convert attendance, satisfaction or a compelling story into a causal impact claim.

One next step to take

Keep this copy for your use. Do not add private cases to shared programme materials.

Read this guide online

https://behindthemarks.org/resources/expert-review-plan

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Resources are free to use. An enquiry creates no obligation to purchase or participate. Keep personal cases out of programme enquiries.