

Self-Assessment Checklist

This self-assessment checklist has been designed to support you identify key areas of strengths and areas for development for developing your organisational readiness to embedding a Lived Experience Model.

Each section has been created to help you review how you are currently including lived experience into your work and plan for future developments.

The checklist gives you suggestions about how you can introduce, embed and use lived experience to its maximum potential in your organisation.

How to use the toolkit

Each of the six sections of the checklists starts with a series of statements for organisations to assess themselves against and to identify their priorities for lived experience development planning, by measuring where you are now and where you would like to be.

You can choose which elements you want to include in a lived experience action plan.

Section 1- Embedding A Lived Experience models into our organisation

Embedding Lived Experience (LE) in an organisation means that people with lived experience are actively included at all levels and in all areas and processes of the organisation. By doing this, you can foster wider awareness and understanding about the issues you are trying to tackle.

It should make your organisation more effective by stimulating discussion, challenging assumptions and thinking, most importantly developing your practice.

Self- Assessment Statements

1. We understand what LE means for our organisation and user groups:

	Not started	Some activity	Some success	Highly effective
Where are we now?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Where do we plan to be?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

2. We have a clear statement of intent for inclusion of people with LE:

	Not started	Some activity	Some success	Highly effective
Where are we now?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Where do we plan to be?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

3. LE is embedded into all areas of our organisation's work and policies:

	Not started	Some activity	Some success	Highly effective
Where are we now?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Where do we plan to be?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

4. We celebrate the positive aspects of LE:

	Not started	Some activity	Some success	Highly effective
Where are we now?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Where do we plan to be?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

5. We encourage the progression of people with LE and they are represented at all levels within the organisation:

	Not started	Some activity	Some success	Highly effective
Where are we now?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Where do we plan to be?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

6. We have a user voice forum or participative methods to include the voices of people with LE:

	Not started	Some activity	Some success	Highly effective
Where are we now?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Where do we plan to be?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Section 2: Welcoming and including people with lived experience

The way an organisation welcomes new people sets the stage for all future interactions. The first point of contact might be in the building, but it may also be your website, a leaflet, a presentation or even an application for funding. You're welcome should be respectful, sensitive and show that you recognise and value lived experience.

Feeling valued is crucial for anyone, together with feeling welcome, included and respected is an important part of organisational cultures.

Self- Assessment Statements

1. Our working environment is accessible and welcoming for people with LE and they feel valued:

	Not started	Some activity	Some success	Highly effective
Where are we now?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Where do we plan to be?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

2. We understand the diversity and intersectionality of people with LE and how to provide appropriate support:

	Not started	Some activity	Some success	Highly effective
Where are we now?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Where do we plan to be?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

3. We have a check list for inclusion which looks at all protected characteristics and intersectionality under the Equalities Act 2010:

	Not started	Some activity	Some success	Highly effective
Where are we now?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Where do we plan to be?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

4. We have an effective policy for inclusion which is reviewed by diverse people with LE:

	Not started	Some activity	Some success	Highly effective
Where are we now?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Where do we plan to be?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

5. We regularly review barriers to inclusion for people with LE and have an action plan to address any issues:

	Not started	Some activity	Some success	Highly effective
Where are we now?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Where do we plan to be?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Section 3: Recruiting people with lived experience (volunteers and employees)

Recruitment is a complex area of work. You may be recruiting volunteers, paid staff, or trustees. Above all irrelevant of the level of role all recruitment practices must be fair, transparent and compliant with industry standards. To be inclusive you should consider the accessibility of recruitment processes to identify potential barriers. The best way to do this is to include people with lived experience in the design, review and development of your recruitment practices and materials to identify barriers and design inclusive practices for people with lived experience.

Self-assessment Statements

1. Our recruitment meets the requirements of the Equalities Act 2010 and is designed to widen participation:

	Not started	Some activity	Some success	Highly effective
Where are we now?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Where do we plan to be?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

2. Our recruitment process is planned and documented:

	Not started	Some activity	Some success	Highly effective
Where are we now?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Where do we plan to be?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

3. We provide sensitive, robust, transparent and fair feedback to candidates:

	Not started	Some activity	Some success	Highly effective
Where are we now?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Where do we plan to be?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

4. We have job descriptions and person specifications for all volunteer and paid roles:

	Not started	Some activity	Some success	Highly effective
Where are we now?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Where do we plan to be?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

5. Our job descriptions and person specifications are reviewed to resolve any barriers for people with LE:

	Not started	Some activity	Some success	Highly effective
Where are we now?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Where do we plan to be?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

6. Our recruitment methods (application, interview, feedback etc.) are reviewed to resolve any barriers for people with LE:

	Not started	Some activity	Some success	Highly effective
Where are we now?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Where do we plan to be?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

7. People with LE are involved in the design and delivery of all our recruitment materials, methods and review:

	Not started	Some activity	Some success	Highly effective
Where are we now?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Where do we plan to be?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

8. We recognise the need for and take a sensitive but robust approach to safeguarding checks in respect of people with LE, including DBS checks where required:

	Not started	Some activity	Some success	Highly effective
Where are we now?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Where do we plan to be?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Section 4: Managing people with lived experience

Managing or supervising people with lived experience requires the same best practice as managing all staff and volunteers. However, it is important to recognise that some may have limited work experience and require additional supervision, support or workplace mentoring.

Management and supervision should be a two-way, collaborative process- a positive way of communicating, sharing information, identifying training needs, exploring challenges and agreeing any actions needed to help someone carry out their role as effectively as possible. This means understanding people's skills and needs and involving them in all aspects of reviewing, planning and documenting their work.

Self-Assessment Statements

1. Our managers understand and share our organisation's ethos and commitment to LE:

	Not started	Some activity	Some success	Highly effective
Where are we now?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Where do we plan to be?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

2. All our staff and volunteers have workplans linked to their job descriptions and that take into account their LE:

	Not started	Some activity	Some success	Highly effective
Where are we now?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Where do we plan to be?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

3. People with LE are involved in the design and delivery of our supervision/management processes, including co-production of workplans and targets:

	Not started	Some activity	Some success	Highly effective
Where are we now?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Where do we plan to be?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

4. Supervision processes capture the value of LE for the individual and the organisation:

	Not started	Some activity	Some success	Highly effective
Where are we now?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Where do we plan to be?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

5. We fund and encourage our staff and volunteers to access specialist support (eg: clinical supervision, counselling) where appropriate:

	Not started	Some activity	Some success	Highly effective
Where are we now?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Where do we plan to be?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

6. Our volunteers have a company email address, access to IT, allocated workspace etc. to help them feel valued and included:

	Not started	Some activity	Some success	Highly effective
Where are we now?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Where do we plan to be?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Section 5: Developing and training people with lived experience

As for all volunteers, employees and board members in an organisation, people with lived experience should have access to personalised training and development to help them achieve their potential and progress in their career path.

Self-Assessment Statements

1. We have a written training policy that includes letting people with LE know how to identify and access suitable training:

	Not started	Some activity	Some success	Highly effective
Where are we now?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Where do we plan to be?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

2. We have a budget for training for all volunteers and staff:

	Not started	Some activity	Some success	Highly effective
Where are we now?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Where do we plan to be?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

3. All our staff and volunteers have individual development and training plans relating to their needs, LE, work experience, and aspirations:

	Not started	Some activity	Some success	Highly effective
Where are we now?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Where do we plan to be?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

4. All our individual development and training plans are co-produced between the volunteer/staff member and manager, and include time to reflect on training undertaken:

	Not started	Some activity	Some success	Highly effective
Where are we now?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Where do we plan to be?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

5. People with LE review our training and development to identify any barriers:

	Not started	Some activity	Some success	Highly effective
Where are we now?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Where do we plan to be?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

6. Our development and training processes enable people with LE to progress through our organisation:

	Not started	Some activity	Some success	Highly effective
Where are we now?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Where do we plan to be?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

7. We have a process in place to evaluate and capture the impact of training undertaken for the individual and the organisation, including the impact for people with LE:

	Not started	Some activity	Some success	Highly effective
Where are we now?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Where do we plan to be?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Section 6: Communicating the value of lived experience

Communicating about the impact of lived experience can be powerful and demonstrates the value lived experience brings to your organisation. However, it is really important to ensure any case studies or testimonials have been authorised by the individuals and their consent to publicity must be granted.

Self-Assessment Statements

1. Our organisation has a communications plan which includes how we value and celebrate LE:

	Not started	Some activity	Some success	Highly effective
Where are we now?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Where do we plan to be?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

2. Our communications plan is sensitive to people with LE, including access needs (language, sensory impairment etc.):

	Not started	Some activity	Some success	Highly effective
Where are we now?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Where do we plan to be?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

3. People with LE are involved in all elements of our communications planning including creating copy, considering LE representation and equality/diversity/inclusion, reviewing impact and identifying barriers:

	Not started	Some activity	Some success	Highly effective
Where are we now?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Where do we plan to be?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Action Plan:

Section	Area of Improvement	Action	Timescale	Owner
Embedding Lived Experience				
Welcoming and including people with Lived Experience				
Recruiting people with lived experience				
Managing people with Lived Experience				
Developing and training people with Lived Experience				
Communicating the value of Lived Experience				