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User and Stakeholder Involvement in Realist Evaluation

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User and Stakeholder Involvement in Realist Evaluation

Abstract

This paper examines the theory, methodology and practice of user and stakeholder involvement in evaluation by focusing on the realist approach to evaluation, a form of theory-driven methodology to evaluate complex social programmes and policies. Recent years have seen a renewed interest in engaging citizen stakeholders in the evaluation of government policy and as a result, the family of stakeholder and user involvement approaches to conduct evaluations has continued to grow. These approaches include collaborative, participatory, empowerment evaluation, co-production, action research, utilization-focused evaluation and so on. The roots of all these evaluation approaches lie in progressive participatory movements to pursue social justice, but the value and values of these practices are contested.

As more evaluation approaches emerge and others, such as realist evaluation, incorporate citizen participation in their repertoire of data collection methods, the lack of conceptual clarity leads to ambiguities and hampers efforts to achieve and evaluate with participatory approaches. This paper provides an overview of all these participatory confounding terms, focusing on differences and similarities with the aim to enhance conceptual clarity. Following this, participatory approaches in realist evaluation studies are explored through a scoping review of current participatory methodological strategies in this evaluation approach. This examination identifies three main models of engagement: vague, targeted, and integrated. Drawing from this knowledge, the realist evaluation approach is compared to collaborative, participatory and empowerment approaches, noting that in most realist evaluations the evaluator is in charge and determines data collection methods, leading to a power imbalance. The paper concludes that the purpose of the realist evaluation studies (even those in the more advanced spectrum of participation) is to establish the worth of the programme, consequently pursuing an accountability and not an empowerment purpose.

Keywords: realist evaluation; user involvement; participatory evaluation; stakeholder involvement; collaborative evaluation, empowerment evaluation

Introduction

Popularised in the late 20th century, mainly in Europe by Pawson and Tilley (1997) and in the USA by Henry et al. (1998), realist evaluation is a theory-driven approach to evaluation that focuses on understanding causality to explain the complex relationship between outcomes, mechanisms and macro-meso-micro contextual circumstances embedded in any policy, programme, and/or intervention (hereafter ‘programmes’). Theory-driven evaluations (also known as theory-based evaluations, see Box 1) (Coryn et al., 2011, Chen, 2012) understand that in any programme, there are “programme theories” (hypotheses) based on assumptions, conceptualisations, and expectations about how the programme designers expect the intervention and their associated components to work. Theory-driven evaluation make these assumptions explicit (and can test them) and in this way, a better understanding of programme implementation complexities is achieved. In this approach, social science substantive theory is also utilised to inform the evaluation by grounding it in established principles that are more likely to enhance rigour.

Box 1: Family of theory-driven evaluation approaches according to Coryn et al. (2012)

“Theory-driven evaluation is sometimes referred to as program-theory evaluation, theory-based evaluation, theory-guided evaluation, theory-of-action, theory-of-change, program logic, logical frameworks, outcomes hierarchies, realist or realistic evaluation (Mark, Henry, & Julnes, 1998; Pawson & Tilley, 1997), and, more recently, program theory-driven evaluation science (Donaldson, 2007), among many others (Rogers, 2000, 2008; Rogers et al., 2000; Stame, 2004)” p.200

Evaluation approaches such as theory-driven and realist evaluation are methodological frameworks comprising of broad strategies and recommended data collection methods to examine the worth of programmes. Realist evaluation investigations do not answer the question: “Does this programme work?” because this approach does not conceive programmes as entities that can ‘work’. Instead, programmes are understood to offer resources to subjects who choose to act on these resources, and these choices end up determining whether the programme works differently for different people, staff, locations, institutions and so on. Consequently, typically, realist evaluation questions examine: “How does this programme work, for whom, under what circumstances and why?” Programme stakeholders are central actors to capture such answers, as they can help to disentangle programme complexity.

Mapping the diverse and ever-changing landscape of evaluation approaches is a complex undertaking (Lemire et al., 2020). Many evaluators have made attempts to classify them (Shadish et al., 1991, Stufflebeam, 2001) using metaphors inspired by nature such as theory roots (Alkin, 2004, Alkin and Christie, 2023), trees (Christie, 2008), and forests (Lemire et al., 2020) with their key branches simile -use, methods and valuing- exerting significant influence within the science of evaluation approaches. However, these classifications faced criticisms (Patton, 2023), for their failure to adequately reflect the actual practice of evaluation across diverse contexts, including NGOs and other resource constraint settings. Some of these evaluation approaches distinguish themselves by having broad strategies centred or controlled

by programme stakeholders (including programme end-users)¹ such as collaborative evaluation (Cousins et al., 2013), participatory evaluation (Cousins and Earl, 1992), utilization-focused evaluation (Patton, 2008), empowerment evaluation (Fetterman, 2001) and many more.

In the last decade, such collaborative approaches have gained significant traction within evaluation communities (Daigneault, 2014) across the globe (Espinosa-Fajardo, 2022). The success of collaborative approaches to evaluation has given rise to conceptual confusion, particularly in the last decade, as other associated terms like co-production, co-development and co-design have gained prominence. Similar terms are also often used interchangeably, such as co-creation, co-research, experience-based co-design, human-centred design, technology co-design, participatory research, collaborative and community-based research (Moll et al., 2020) (See Box 2). As more evaluation approaches emerge and many others, such as realist evaluation, incorporate citizen participation in their repertoire of data collection methods, the lack of conceptual clarity between these evaluation and research approaches² leads to ambiguities and hampers efforts to evaluate collaboratively. This paper starts with an overview of key collaborative approaches confounding terms while showing how they can pose methodological challenges for evaluators. After this, collaborative evaluation approaches incorporated in realist evaluation will be examined to identify three main models of engagements: vague, targeted and integrated. Drawing on from this knowledge, the realist evaluation approach is compared to collaborative, participatory and empowerment approaches noting that in most realist evaluations the evaluator is in charge and data collection methods are determined by the evaluator. The paper concludes that the purpose of the realist evaluation studies (even those in the more advanced spectrum of participation) is to establish the worth of the programme, consequently pursuing an accountability and not an empowerment and social justice purpose.

Box 2: Some evaluation and research approaches based on user involvement and collaboration

| EVALUATION APPROACHES | RESEARCH APPROACHES |
|---|--|
| Empowerment evaluation | Emancipatory research |
| Participatory evaluation | Action research |
| Joint evaluation | Participatory Action Research (PAR) |
| Democratic evaluation | Participatory research methods |
| Stakeholder evaluation | Participatory appraisal |
| Stakeholder theory-based evaluation | Appreciative enquiry |
| Utilization-focused evaluation | Co-production |
| And also: internal evaluation, self-assessment... and more. | And also: Co-design, co-realisation, co-creation, co-development ... and more. |

¹ When I use the term programme “stakeholders”, this includes end-users of the programme unless explicitly mentioned otherwise.

² Lincoln and Guba discuss at length the distinction between research, evaluation, and policy analysis Lincoln, Y. S., Guba, E.E. (1986). "Research, evaluation, and policy analysis: Heuristics for disciplined inquiry." Review of Policy Research 5(3): 546-565.

I. Into the jungle of collaborative evaluation approaches: conceptual and methodological challenges for evaluators

Policy makers such as the United Nations (UN) (2008), the Council of Europe (2017), and the World Health Organization (2016) have made explicit the requirement to involve stakeholders in policy and decision-making. There is, however, no agreement in the grey and peer-review literature on definitions and terminology for public participation in government. Terms often used interchangeably are citizen/civil engagement, public involvement/dialogue/participation, participatory democracy, etc. There is no consensus in the literature, either, on what counts as “participation” in the policy-making process (UNDP, 2022).

Similarly, in the 21st century, the family of collaborative evaluation approaches has been growing steadily yet there is still a significant amount of conceptual and methodological confusion. The roots of collaborative evaluation approaches lie in progressive participatory movements to pursue social justice, but the value and values of these practices are contested. Fruitful debates in evaluation journals and publications (Cousins, et al., 2013, Cousins et al., 2014, Fetterman et al., 2014, Fetterman and Wandersman, 2017) discussed and clarified features of the three major approaches in stakeholder involvement evaluation approaches: collaborative, participatory, and empowerment evaluation, summarized in Table 1. These three approaches (and many others) exist along a spectrum of participation and stakeholder control (Dugan, 1996). At one end of the spectrum is "empowerment evaluation," which stands out for its extensive participation and stakeholder control (Fetterman, 2001). Notably, empowerment evaluation also places a distinct focus on achieving social justice through stakeholder self-determination, as pointed out by (Patton, 1997). Collaborative and participatory evaluation, on the other hand, share the goal of accountability. In the collaborative approach, the evaluator takes charge of evaluation objectives, design, data collection, analysis, etc. In contrast, the participatory approach involves joint responsibility, negotiation and consensus between evaluators and participants for some of these processes³.

Table 1 Comparative table: Collaborative, participative and empowerment evaluation

| EVALUATION APPROACH | EVALUATOR ROLE | STAKEHOLDER ROLE | PURPOSE | DATA COLLECTION METHODS |
|---------------------------------|--|--|----------------|---|
| COLLABORATIVE EVALUATION | Evaluator in charge | Ongoing engagement with stakeholders | Accountability | Determined by the evaluator |
| PARTICIPATORY EVALUATION | Evaluator and stakeholders are jointly in charge | Stakeholders are involved in conducting the evaluation, jointly with the evaluator (co-evaluators) | Accountability | Jointly determined by the evaluator and stakeholder |
| EMPOWERMENT EVALUATION | Stakeholders are in charge | Stakeholders are responsible for conducting the evaluation | Social justice | To be determined by stakeholders |

³ To read about the difference between co-production and co-design refer to Robert, G., Locock, L., Williams, O., Cornwell, J., Donetto, S., Goodrich, J. (2022). *Co-Producing and Co-Designing. Elements of Improving Quality and Safety in Healthcare*. C. U. Press. Cambridge.

There are three broad motives for user involvement in evaluation. Firstly, there is a desire to enhance the quality of evaluation processes, outcomes, and outputs, which assumes that including stakeholders and end-users in projects will pragmatically increase findings reliability and relevance (Ives et al., 2013). Secondly, an ideological motivation based on principles of democratic representation, transparency, accountability, values, responsibility, and the redressing of power imbalances. This rights-based perspective emphasizes social and ethical narratives, along with values and responsibility (Ives et al., 2013). Thirdly, a consumerist motivation, which revolves around the involvement of autonomous consumers in personalising their care (consumer choice model) (Knaapen and Lehoux, 2016).

However, the involvement of stakeholders in research and evaluation has brought about some criticism. At its worst it can be insignificant, tokenistic, overly managerialist (Madden and Speed, 2017) and harmful (Ross et al., 2023). In evaluation research, the challenges of user involvement expand across conceptual and methodological frameworks. Some of these are:

- 1) **Defining the user.** Defining who qualifies as a user in evaluation is critical to ensure that the evaluation captures the perspectives and experiences most relevant to the evaluation objectives. Some evaluation approaches often prioritize the perspectives of programme staff or “stakeholders” over the end-users, focusing more on programme staff (stakeholders) than on participants (end-users or users).
- 2) **Confounding collaborative and participatory approaches.** As explained, there are multiple evaluation approaches involving stakeholders and users with unique sets of principles and methods, such as utilization-focused evaluation, democratic evaluation and empowerment valuation, among others. This spectrum of approaches can lead to confusion and lack of clarity about which approach is most suitable for involving users in evaluation. Determining the most appropriate approach becomes challenging because of the confounding concepts and sub-type nuances and methodologies. Evaluators should carefully select the one that aligns best with the evaluation objectives and the specific context of their programmes.
- 3) **Defining significant "participation".** Establishing what constitutes meaningful and significant participation, collaboration or involvement in the evaluation process can be challenging. This relates to the level of engagement required from different users to ensure their perspectives are adequately captured and represented, considering the diversity of individuals and their capacity to participate. Some individuals may choose not to participate or engage only on a limited basis because of cultural norms, power dynamics, previous negative experiences, or competing priorities.
- 4) **Capacity building for quality involvement.** Achieving quality involvement of users in evaluation research necessitates capacity building efforts. Users may require support and training to effectively engage in the evaluation process, provide meaningful input, and navigate the evaluation methods and tools and participation strategies. All these have material, knowledge, time, staff, and resource implications.
- 5) **Evaluation vs ideology.** While participatory approaches align with principles of empowerment and social justice, it is essential to ensure that the evaluation process

remains rigorous and focused on assessing programme effectiveness, which is the ultimate aim of the evaluation discipline.

Theory-driven evaluations such as realist evaluation are grounded in user involvement (Hansen and Vedung, 2010) because their input is crucial to understand the assumptions and logic models of the programme by providing insights and experiences. Nevertheless, as Weiss (1997) noted, there are challenges associated with this feature of theory-driven approaches, including difficulty in identifying or constructing the theory due to its unclear nature, confusion about its components, and the existence of multiple possible theories. This relates to the common issue of the existence of multiple stakeholder programme theories, which emphasizes the importance of whose stakeholders are involved, how, why and for how long because this determines whose theory is developed, tested and refined. Hansen and Vedung (2010) noted in their review of theory-based evaluations that, in general, heterogeneous stakeholder programme theories are not kept apart; they are often merged by the evaluator into one unitary programme theory “behind which all stakeholders may rally” (p.297). This means that what is constructed is one unitary intervention theory of the evaluator, informed by relevant theory and negotiated with and agreed upon by the stakeholders (p.298).

The assumption behind this unitary fused theory of evaluator's expertise with the stakeholders' first-hand knowledge is that a more robust evaluation is generated because it accounts for both theoretical constructs and real-world experiences. However, it is important to acknowledge that this approach can sometimes result in the evaluator's perspective carrying more weight, potentially overshadowing the input of various stakeholders. In addition, this fused approach may not always be suitable for all evaluations, particularly in the case of large programmes or contested policy areas (e.g., drug legalisation, sex work). These situations often involve diverse perspectives and competing interests, which may be better served by maintaining separate stakeholder programme theories to capture the range of viewpoints and nuances involved.

In summary, it is important to acknowledge that despite stakeholder involvement in theory-driven evaluations, the ultimate control and decision-making power regarding the evaluation results typically remains in the hands of the evaluator. This power dynamic can limit the extent to which stakeholders' voices truly shape the evaluation process and outcomes. In the next section, the current state of participatory methodological strategies in realist evaluation studies will be examined.

II. User and stakeholder involvement in realist evaluation: three models of collaboration

In realist evaluation, stakeholders' experiences and insights are crucial in shaping and validating the theoretical framework, making it more comprehensive and accurate to capture complexity and ascertain causality. To understand the current state of participatory methodological strategies in realist evaluation studies, the research methods section of realist evaluation studies published between 2012-2022 (inclusive) (Scopus database) were examined, focusing on publications that had used the terms 'co-design', 'co-production', 'participatory', 'action research' in the title or abstract (n = 96); after screening titles and abstracts, 32 studies were identified, which included ten research protocols. The review was not intended to be exhaustive but exploratory and it focused around three main questions: (1) What are the participatory research methods used in these realist evaluation studies? (2) What methodological challenges and benefits related to combining participatory methods with realist evaluation did these papers raise? (3) What patterns of collaboration can be established in these papers?

Most papers described their methods as participatory (n=17), with nine using co-production or similar (co-design, etc.), five using action research and one referring to mixing realist evaluation with principles of empowerment. The analysis attempted to identify key patterns in the ways the range of collaborative approaches was integrated with the realist evaluation principles across the sample. To do this, each paper was read in full and extracted data on the aims and objectives of the study, study design, whether the collaborative model was defined and how, and limitations of the study. Discussion sections were scrutinised for any methodological learnings on combining it with realist evaluation. A matrix of text for each paper was created and text was analysed to produce a taxonomy of the ways collaboration approaches were integrated in realist evaluation project designs. Three possible models of collaboration in realist evaluation were identified and are examined below: vague, targeted and integrated.

II.1. The vague collaborative model

In some of the papers reviewed, studies showcase a wide range of involvement features, including stakeholder "advisory groups", "participatory approach/research", "reflective practice sessions", and "action research". These studies reflect a commitment to involving stakeholders and promoting knowledge exchange in evaluation processes. However, despite the plethora of involvement techniques mentioned, these are occasional with collaboration strategies within papers in this model remaining largely vague. That is, the precise pathways through which stakeholders' insights flow and interconnect within the evaluation framework is unclear, leaving observers to guess how the intricacies of the participatory process are managed and integrated in knowledge development. Furthermore, although end-users and stakeholders are consulted, the integration of "stakeholders' theories" with the theories held by evaluators is unclear with the merging process remaining uncertain.

As an illustration, (Jeon et al., 2019) evaluated a model of integrated community aged care services and hospital-based community geriatric services using a “mixed-methods action research approach, consisting of a multi-centre pragmatic parallel-arm randomised controlled trial (RCT) and realist evaluation” (p.1). In their intervention and evaluation, clinicians work with people with dementia and carers to identify goals and action strategies for their care; there was an advisory group to “provide a platform for provision of insight and suggestions for people living with dementia and their family/carer” (p.12) and also, users were “involved as research participants”. While involving end-users as research participants is a valuable step, it should not be mistaken with a participatory approach since this aims not only to gather end users' input but pursues a fundamental shift in power dynamics and empowerment ethos.

In Naccarella's (2016) evaluation of health courses, a participatory evaluation approach was described as enabling “a working partnership to grow between the evaluation team and the short course developers and organisers to ensure all were engaged and involved within the evaluation processes and evaluation learnings” (p.22). However, there was no elaboration on the details of how this engagement was integrated into the various phases of the evaluation cycle, including the formulation of evaluation questions, the design of the study, and data analysis. Another illustration is the McInnes et al. (2020) participatory research included in the realist evaluation of the Scottish Government continuity of a midwife programme. The researchers were “clinical academics within the board”, and they attended “team meetings to facilitate reflective practice sessions to develop a force field analysis of the key factors affecting implementation and staff experience” (p.4). It remains unclear how these participatory events and activities were effectively integrated into the programme theory development and testing processes characteristic of realist evaluation studies; and the extent to which these activities informed the generation of hypotheses, data collection strategies, and the validation of programme theories within the realist evaluation framework.

In conclusion, while a diverse array of involvement methods and events is evident in these studies, they do not constitute an overall participatory study strategy with the process of developing stakeholder and evaluator theories remaining vague.

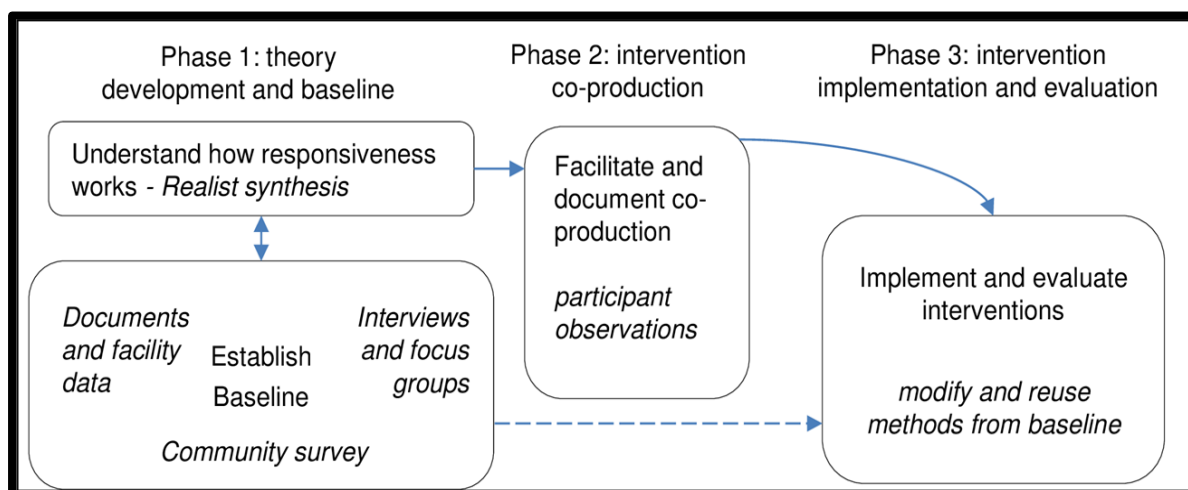
II.2. The targeted collaborative model

In some of the papers reviewed, a recognized collaborative research method is used only in one or more phases of theory-development. This commonly involves evaluators developing initial programme theories, often supplemented with occasional consultations with stakeholders that may vary in terms of formality and can include co-designing an intervention. In these studies, however, the responsibility for shaping evaluation questions and methodologies typically still rests with the evaluators themselves. The collaborative approach is therefore targeted in specific evaluation steps/phases/tasks, as opposed to being integrated completely across the whole study.

An example of this group of studies is Alvarado et al. (2021) who evaluated an interactive quality dashboard to present national clinical audit data in England using co-design in Phase 4 of their five-phase study (Randell et al., 2022). This, alongside other methods, consisted of two co-design workshops (each spanning three hours). During the second workshop, a

prototype dashboard was introduced to stakeholders after a series of nine one-to-one meetings, where feedback on the prototype was sought, enabling a refined development process. In Mirzoev et al. (2021) three-phase study evaluating health systems responsiveness in Ghana and Vietnam, they also opted for co-production in one of their study phases (Phase 2). The co-production phase entailed the active involvement of stakeholders in the creation of an intervention to improve maternal mental health in each of those countries. Subsequently, in the third phase, the co-produced intervention was implemented and evaluated (See Box 3). Other studies such as Verbeek et al. (2022) and Halsall et al. (2021) did not specify a defined study phase but explained how the knowledge of the collaborative approach was fundamental for the sequenced tasks included in the evaluation. For example Verbeek et al. (2022) explained how they expected their qualitative interviews topic guides to be based “on relevant outcomes of the results from the earlier action research and discussions with experts in interprofessional collaboration”(p.5).

Box 3: Mirzoev et al. (2021) three-phase study incorporating co-production



While the specific phases and methods may vary, the common thread of the group of papers belonging to this model is that evaluators still play the central role in designing and executing the evaluation framework, with a targeted and specific collaborative step.

II.3. Integrated collaborative model

In a smaller group of studies, the collaborative approach is not merely a peripheral component but rather an integral element throughout every stage of theory development. Evaluators employ a comprehensive strategy that involves instructing and engaging stakeholders in both realist evaluation and a collaborative methodology that is suitable to the “realist” approach because it helps with causality and programme theory refinement using context-mechanism-outcomes configurations.

Some of these pioneer realist evaluators integrated participatory approaches across all phases of their studies. They established their methodological innovations by affixing the descriptive term “realist” to their integrative and participatory approaches. For example, Harris (2018, 2020) established the “realist collaborative evaluation” approach and Westhorp et al. (2016) developed the concept of “realist action research”. Harris’ study incorporates the principles

to guide collaborative approaches in the five phases of their evaluation: 1) Developing programme theory 2) Developing realist evaluation questions 3) Agreeing appropriate methods to answer questions 4) Analysing data and findings to enhance use 5) Communicating evaluation findings.

“Realist action research” (Westhorp et al., 2016, Kegels and Marchal, 2022) incorporates realist evaluative activity within the action research cycle, structuring the lessons likely to be learnt about the programme as lessons about context, mechanism and outcomes configurations and the modifications that are likely to be made in the next iteration of the programme. Westhorp described realist action research as a “hybrid of traditional action research and realist principles – supported by implementation methods drawn from the field of service co-design” (p. 362). Interestingly, despite this integral participatory stand, Westhorp et al. clarified that “realist action research need not take a particular stance on the nature or degree of participation in different aspects of the research process. What matters for the approach to be realist is not the nature of participation, but the realist logic of enquiry” (p. 366). Co-design was considered a specific tool for developing differentiated context-driven services that are more likely to offer specific local benefits and better value for users.

In this group of papers, the realist evaluator seems to have a “teacher-learner” role (Manzano, 2016) in the process of integration of the collaboration principles with the application of realist evaluation. Learning from collaborative partners about the programme intricacies, the realist evaluator’s role is to guide through the practicalities of the programme and the realist collaborative approach across all phases of the study.

Discussion

The findings of this scoping review suggest that the practice of realist evaluation offers a range of participatory engagements, mostly occasional and/or targeted strategies with a few offering participation as an integral model of the realist evaluation. Drawing on from this knowledge, Table 2 compares the realist evaluation approach to collaborative, participatory and empowerment approaches noting that in most realist evaluations, the evaluator is in charge and data collection methods are determined by the evaluator. The purpose of the realist evaluation studies (even those in the more advanced spectrum of participation) is to establish the worth of the programme, consequently pursuing an accountability and not a social justice purpose. However, evaluation as a discipline has the long-term aim to contribute to social change by assessing the worth of social engineering initiatives such as interventions, programmes and policies.

Table 2 Comparative table: Realist, collaborative, participative and empowerment evaluation

| EVALUATION APPROACH | EVALUATOR ROLE | STAKEHOLDER ROLE | PURPOSE | DATA COLLECTION METHODS |
|--------------------------|--|---|----------------|---|
| REALIST EVALUATION | Evaluator in charge | Range of engagements. Mostly occasional or intermittent engagement in the evaluation. | Accountability | Determined by the evaluator |
| COLLABORATIVE EVALUATION | Evaluator in charge | Ongoing engagement in the evaluation | Accountability | Determined by the evaluator |
| PARTICIPATORY EVALUATION | Evaluator and stakeholders are jointly in charge | Involved in conducting the evaluation | Accountability | Jointly determined by the evaluator and stakeholder |
| EMPOWERMENT EVALUATION | Stakeholders in charge | Responsible for conducting the evaluation | Social justice | To be determined by stakeholders |

Collaborative approaches in research and evaluation have gained prominence due to their potential to incorporate multiple perspectives and ensure contextual relevance. Some authors argue (Westhorp et al., 2016) that realist evaluation principles can further enhance these collaborative efforts by increasing understanding of diverse contexts, exploring causality claims, and eventually developing effective interventions. Westhorp et al. (2016) propose that realist evaluation principles align especially well with action research, as both share a realist epistemological foundation. Realism acknowledges the existence of underlying mechanisms that produce certain outcomes, while action research aims to generate knowledge through practical intervention and reflection. This shared epistemological perspective enables realist evaluation to be effectively integrated into collaborative research settings.

The central role of context in realist investigations (Greenhalgh and Manzano, 2022) is key in these partnerships. Collaborative approaches allow users to contribute their expertise and insights about their own context (Jackson et al., 2022). By involving stakeholders as experts in understanding their reality, collaborative approaches embrace diverse ways of knowing and facilitate academic rigor. The incorporation of realist evaluation principles further strengthens this understanding of context. Realism focuses on exploring context-sensitive mechanisms, thereby helping to identify the specific factors that influence programme outcomes. Harris (2018) highlights that stakeholders are well-positioned to interpret and reflect on the manifestation of change within their context. In collaborative evaluations, users' participation can aid in exploring causality claims and understanding the processes underlying programme effectiveness.

The realist evaluation logic of enquiry requires not only capacity building to explain the alien realist jargon, but also on how this evaluation strategy assesses causality and deals with programme effectiveness. In addition, in participatory realist studies, citizens need to be involved in designing strategies that promote meaningful participation, while supporting evaluation thinking, which is vital for successful collaborative approaches. When participation involves analysis, a balance must be struck between realist and participatory elements,

adapting the approach as necessary (Jackson et al., 2022). Despite the good intentions, this is not always possible. Berends and Wansbrough (2023) in their evaluation of a youth alcohol and drug programme drew from principles of empowerment and realist evaluation but they explained how they were not able to include young people as team partners in their evaluation because of resource and time constraints.

To conclude, notwithstanding the numerous practical and conceptual challenges, realist evaluation principles seem beneficial for designing interventions that align with the unique characteristics of the local context (Westhorp et al., 2016). By understanding how and why interventions work, stakeholders and evaluators can effectively adapt successful interventions to different settings. This adaptability fosters greater scalability and relevance of programmes across diverse contexts. By recognizing the dynamic interplay between realist and participatory approaches and the need for continual adaptation, realist evaluators are more likely to navigate the collaborative continuum successfully.

Limitations of the study

There are several potential limitations of this study. The scoping review exploratory objective is likely to have missed the full range of methodological strategies and challenges of combining participatory methods with realist evaluation. The focus on studies explicitly mentioning specific participatory terms in the title or abstract may introduce sample selection bias, excluding relevant studies that employ participatory approaches but do not use the exact terms targeted. A more extensive and comprehensive review might provide a more in-depth understanding of this topic. The inclusion of only published studies and word count limitation imposed by journals does limit the available space that studies have for in-depth description of their participatory methods and strategies.

Conclusion

Realist evaluators navigate across a collaboration continuum to foster meaningful participation and to strike a balance between realist and participatory elements of the study. Realist evaluation principles hold potential in enhancing collaborative approaches in research and evaluation designs but this is not without challenges. The alignment of the realist logic of enquiry with collaborative epistemological foundation allows for a deeper understanding of context, exploration of causality claims, and eventually may support the development of more contextually-driven effective interventions.

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