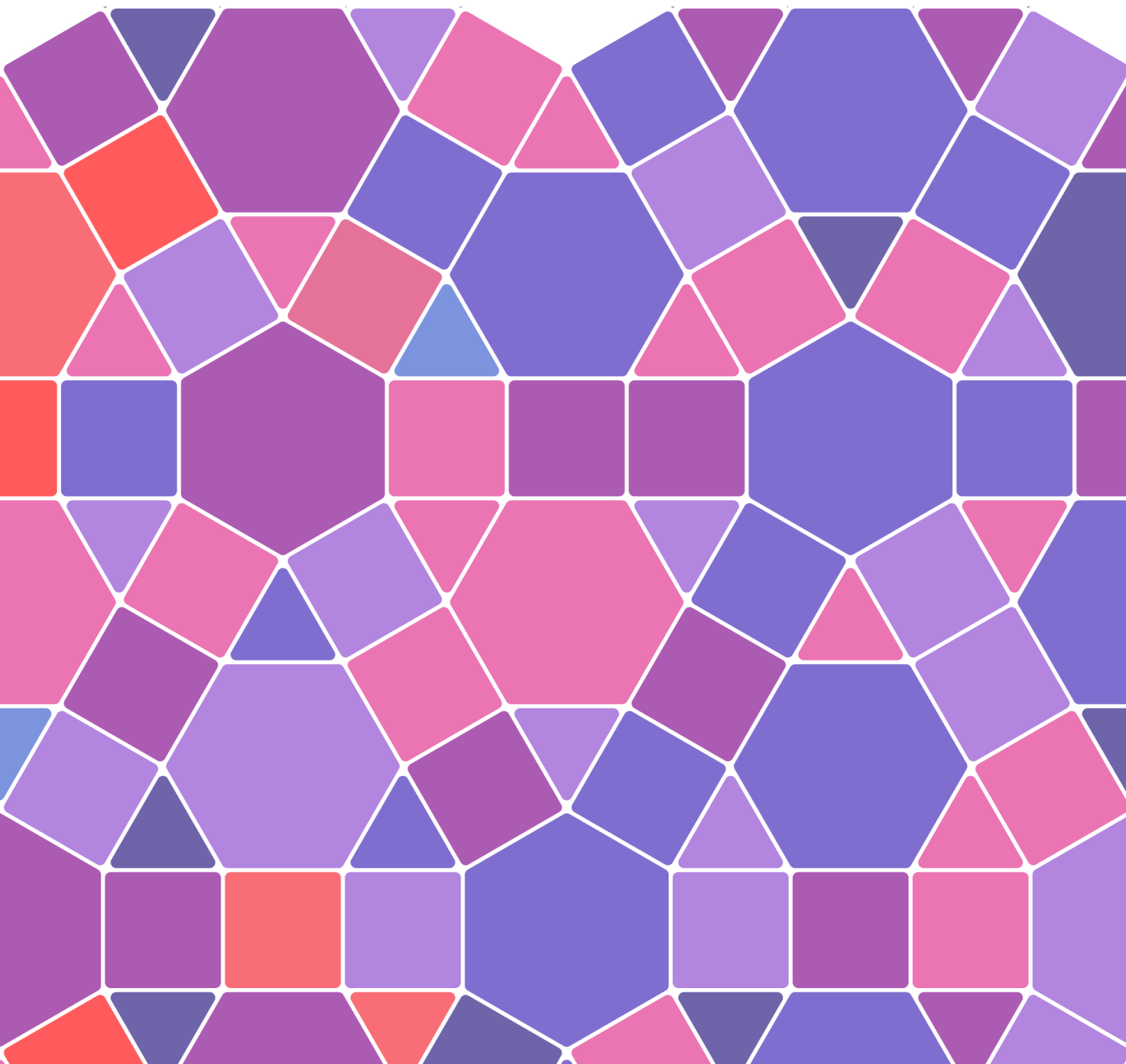


Good Practice Standards Toolkit

Consultation Report

November 2025



Executive Summary



The PEDRI Good Practice Standards (GPS) Toolkit was developed to help embed effective public involvement and engagement (PIE) in data research and statistics. Created by a multidisciplinary working group, the Toolkit builds on existing models and was refined through peer review.

Between June and October 2025, PEDRI conducted a comprehensive consultation process involving interviews, focus groups, and an online survey. Stakeholders included public advisory groups, academic institutions, data organisations, and professional communities. Feedback was gathered on the Toolkit's clarity, usability, relevance, and alignment with the GPS.

Initially, the toolkit was pitched as an evaluation tool to support assessment of PIE activities in alignment with the Standards. Feedback received during the first phase of consultations highlighted that was not a formal evaluation framework, and instead more of a tool to support planning and reflection. Other common themes from consultation feedback included:

- Accessibility: Concerns about readability and usability, especially in the Excel format.
- Communications: Need for clearer messaging on the Toolkit's unique value and use cases.
- GPS Integration: Calls for stronger links to all seven GPS Standards.
- Guidance: Requests for more examples, clearer terminology, and support for public input.
- Journey Log: Suggestions to refine prompts and improve the Journey Log.
- Sustainability: Interest in long-term use, sharing lessons learned, and digital formats.

As a result of the consultations, the Toolkit was reframed to support planning, delivery, and reflection of PIE activities—not just evaluation. Key updates included:

- A new "Standards" column in the Journey Log.
- Step-by-step guidance and real-world examples.
- Enhanced prompts and terminology.
- Removal of the Journey Snapshot.
- Improved formatting and branding.

Final recommendations include offering the Toolkit in Excel and PDF formats, adding guidance via Excel tooltips, and developing training resources and case studies. These changes aim to make the Toolkit more practical, inclusive, and adaptable across the data research lifecycle.

Introduction



PEDRI developed the [Good Practice Standards \(GPS\)](#) to guide practices for public involvement and engagement (PIE) in the use of data for research and statistics. Building on existing guidance, these standards are designed to support researchers, PIE professionals, and everyone involved in data-related projects, ensuring that public voice is an integral part of the data community.

During consultations on the Standards, the data research community identified a need for practical tools to support organisations and teams in adopting the Standards, tracking progress of PIE activities and evaluating outcomes. To address this need, the GPS Working Group – a multidisciplinary collaboration of public contributors, PIE professionals from data-focused organisations, and researchers – created the toolkit.

The first version of the toolkit was developed by the GPS Working Group between January to May 2025. Existing evaluation models such as the [Guidance for Reporting Involvement of Patients and the Public Version 2 \[GRIPP2\]](#) and [Public Involvement in Research Impact Toolkit \[PIRIT\]](#) were reviewed to identify strengths and gaps relevant to data research and statistics. The development of the toolkit was an iterative and collaborative process, shaped through successive drafts and multiple rounds of peer review. This approach led to the first version of the toolkit, called the PEDRI Evaluation Tool, (**appendix 1**) which was shared at the [PEDRI GPS Frontiers Meeting](#) in June 2025 and for wider consultation.

Methods



Across June to October 2025, PEDRI conducted a consultation process comprising of structured one-to-one interviews, focus groups and an online survey with stakeholders across the data research and statistics ecosystem. The intention was to gather feedback

from individuals and groups who represent the intended audience for the toolkit. A list of all those consulted is outlined in **table 1**.

Table 1: Calendar of consultations

Affiliation	Date of consultation (2025)
PEDRI Public Advisory Group (3 members)	30 June
Research Data Scotland	30 June
PEDRI Public Advisory Group (1 member)	4 July
University of West England	21 July
Illumina	4 August
Former GPS Working Group member	29 August
Data Science PPIE Group (based at Edinburgh University; 14 members)	2 September
UK Medical Statistics Society PPIE Community of Practice Lead	4 September
Alliance PPIE Leads (10 members)	8 September
Office for Statistics Regulation	10 September
HDR UK PPIE Leads Group (19 members)	11 September
PEDRI Steering Group (5 members)	11 September
ADR UK Conference Workshop (x participants)	16 September
PPIE Methodology Research Group (based at University of Sheffield; 20 members)	19 September
Smart Data Research UK	3 October

For each session, participants received pre-reading materials which outlined the purpose and structure of the toolkit. During the sessions, a facilitator reiterated the purpose of the toolkit and presented each of the toolkit components. Discussions were guided by tailored prompts outlined in **appendix 2**.

After the first round of consultations in June to September, the GPS Working Group met on 10 September to review the feedback received and update the toolkit ahead of the 2025 ADR UK Conference (16-18 September). At this conference, PEDRI held a variation of the consultation format to receive further feedback on the toolkit. This session used prompts and vignettes to a) explore perspectives on how the updated toolkit might be applied in practice and b) encourage reflections on its use in personal and professional contexts.

After the consensus meeting, a further six consultations were had, including the ADR UK Conference workshop, using the updated version of the toolkit (**appendix 3**).

From 29 September to 20 October 2025, an anonymous survey (**appendix 4**) was published to broaden engagement and capture additional perspectives on the toolkit. The survey sought to understand who might use the toolkit, how likely they were to use it in their own work, and what improvements could be done to enhance its use.

The feedback received was reviewed by the GPS Working Group throughout the consultation process. Insights from the consultation sessions and survey informed subsequent revisions to the toolkit. After the consultation period ended, one member of the group analysed the total feedback received and grouped suggested improvements and concerns into themes. These themes and the related feedback were presented back to the GPS Working Group for review and discussion. The Group held a consensus meeting at the end of October 2025 to agree final revisions to the toolkit. The suggested revisions were circulated to members who were not present at this meeting for further comment and approval.

Findings



This section outlines the feedback received from the structured consultation meetings and the survey, and any changes that were made to the consultation material during this period.

Consultation meetings



Initial consultations welcomed the presented Toolkit (originally presented as an evaluation tool to support assessment of PIE activity against the Standards), highlighting the value of having a systematic and flexible way of documenting PIE, with the possibility of using both quantitative and qualitative metrics of success, as well as accessing Real-World Examples.

While some reflections were made on making the Toolkit resources available on a digital platform, others noted the challenges this could present across teams and organisations. There was also a call for greater integration of the GPS and for more specific examples of implementation.

At the GPS Working Group in September, one major change agreed by the Group, and resulting from consultation feedback, was the move to framing it as a toolkit to support planning, delivery and reflection of PIE activity, rather than purely an evaluation tool. Comments received queried the validity of the toolkit in its current version as a rigid framework to support evaluation of PIE against the GPS.

Other changes agreed included adding an additional column to the Full Journey Log dedicated to which GPS the objective relates to. This change was a result of consultation

feedback, which said the GPS can overlap and the presented version does not support this well.

There were also requests for more detailed guidance and additional examples of the completed full journey log to support potential users who may be starting their journey in PIE. This change was made ahead of the workshop. Two examples of the completed Full Journey Log (one focusing on health data, one focusing on administrative data) were added to the toolkit. Step-by-step guidance was also added to advise people on how to use the toolkit. All changes made after the first round of consultations are outlined in **table 2**.

Table 2: Changes made to toolkit after first round of consultations (30 June-10 September 2025)

Description of changes	Toolkit components updated
Toolkit reframed as a tool to support planning, delivery and reflection of PIE activities aligned to the GPS.	All
Additional "Standards" column added to Journey Log and Journey Snapshot where people highlight which Standard/s their objective is addressing.	Journey Log Journey Snapshot
A step-by-step section outlining how to use the toolkit added to the Guidance.	Guidance
Added two examples of how the Journey Log can be completed based on real-life examples (one health data research project, one administrative data research project).	Real-world examples (new component)
Added clearer description of the "Diary Log" and additional prompt to Journey Log related to recording challenges encountered and how they were approached.	Journey Log Journey Snapshot Guidance
Renamed "Diary Log" to "Diary Log/Reflections"	Journey Log Journey Snapshot Guidance
Adding/updating prompts under "Context" to encourage information on resourcing, organisational context, and which communities were involved.	Journey Log Journey Snapshot
Toolkit updated to PEDRI branding (Excel version)	All

From the consultations after the September consensus meeting with the GPS Working Group, feedback received was largely positive, with support from statisticians who

highlighted the need for tailored toolkits and guidance for PIE in statistics due to current gap in this area. Feedback also highlighted:

- Whether there is a need for two versions of the template (full journey log and journey snapshot)
- A request for additional guidance to support how public contributors can be involved in the development of objectives,
- A request for better capturing the lessons learned from PIE activities and providing guidance on how to share this information
- The needs and risks associated with an online, interactive version of the toolkit.

Survey

Only four responses were received for the consultation survey (one PIE professional, one data researcher and two public members). Comments highlighted the importance of the toolkit in supporting others to champion the Standards and it could act as a useful reminder for areas to consider when planning your PIE activities. There was a suggestion to provide practical guidance for PIE activities within a data research context, and another respondent highlighted the inaccessibility of the toolkit version presented causing a lack of clarity on how to use it.

Thematic analysis of consultation feedback

Ahead of the consensus meeting at the end of October 2025, all consultation feedback was reviewed (including feedback from both rounds of consultation meetings and the survey) and suggestions for improvement were grouped into themes. Suggestions which had already been acted on after the first round of consultations were removed from this analysis. The themes and a summary of the related feedback is shown in **table 3**.

Table 3: Summary of consultation feedback grouped by theme

Theme	Feedback summary
Accessibility	In its current format, the toolkit content is too dense which makes it difficult to read and understand.
Communications	It is not clear what the toolkit adds or does differently to existing resources and toolkits supporting PIE activity. To encourage others to use the toolkit, it would be good to see use cases and testimonials from teams who have used it.
GPS Integration	The toolkit needs a stronger link to the GPS throughout and encourage users to adopt all seven Standards.

Guidance	Additions to guidance to improve clarity on how the toolkit can be used throughout a project/programme, how it can be tailored to support user needs and directing users on where to go if they need support.
Guidance – Examples	More examples of how to use the journey log within data and statistics contexts, and examples that cover a range of organisational setting (from individuals to departments).
Guidance – Public Input	Offer guidance on how to involve public contributors in completing the toolkit e.g. in developing objectives, including feedback in the Diary Log.
Journey Log – Components	Further clarification on the terms used in the Journey Log is needed (e.g. objectives, impact) and explore adding additional sections to help capture further information on the PIE activities (e.g. purpose of PIE activity).
Journey Log – Prompts	Further clarification on the terms used in the Journey Log prompts is needed, specifically impact.
Learning / Sustainability	It is not clear what users should do with their toolkit once their project comes to an end. How can they share their learnings with the wider PIE community?
Two templates	When offering two versions, people will lean towards using the shorter version (Journey Snapshot). Providing two options asking for similar information does not seem beneficial.

Recommendations for toolkit changes

Based on the consultation feedback, the GPS Working Group have made the following changes to the final version of the PEDRI GPS Toolkit.

Improve readability and ease-of-use

The Toolkit will be available in an Excel version and a PDF booklet – both of which will be downloadable from the PEDRI website. In the Excel version, people can hover their cursor over certain parts of the toolkit to view relevant guidance (this function can be toggled on/off).

Better integration of the Good Practice Standards

To improve the integration of the Standards within the toolkit, in the guidance, we will add prompts relating to each Standard i.e. how will someone know that they are adopting a certain Standard.

In the guidance, an extra sentence will be added which encourages users to adopt all seven Standards in their PIE activities. This is not currently stated.

Improve the guidance



To improve the guidance, the following changes will be made:

- As an add-on to the toolkit, there will be an optional form for gathering feedback from public members involved in PIE activities which is aligned to both the Journey Log and the Standards.
- An additional section highlighting the importance of incorporating the public perspective into developing, monitoring and reflecting on PIE activities. This will link to the Pledge and encourage users to work their involved public members to create objectives and gather feedback for input into the “Diary Log/Reflections” section of the Journey Log.
- In the “Practical OKR examples”, highlight which of the OKRs have overlapping Standards.
- To provide clarity on what is meant by “Impact” section in the Journey Log. In this toolkit, impact includes immediate and medium-term impact. Some examples of the different domains within this will also be provided e.g. impact on policy.

To further improve the guidance for the toolkit, we will be working on the following changes. These are not immediate changes but will be acted on ahead of the end of 2026:

- To work with the Learning and Development/Resources Lead to develop training/bitesize videos to support users in completing the toolkit and when it can be used throughout the researcher journey.
- To signpost to case studies and testimonials, when available.

Improve the Journey Log



For the Journey Log, the only immediate change is to rename the “Diary Log/Reflections” to “Reflections/Lessons learned” to improve clarity on the type of information to capture in this section.

In early 2026, the GPS Working Group will work with the Learning and Development/Resources Lead to develop resources to support users in inputting into the Journey Log.

Removal of the Journey Snapshot



The Journey Snapshot will be removed from the toolkit. In the guidance, users will be guided to tailor the Journey Log to suit their needs and project.

Identifying case studies and lessons learned



On the Toolkit webpage, users will be able to access a short form to provide feedback on how they used the toolkit and rate its usefulness. As part of this form, there will be questions asking whether PEDRI can contact them about providing testimonials and/or sharing case studies. The purpose of the case studies is to showcase how different teams and organisations are adopting the Standards and sharing learning across the data research and statistics sector.

Build an informative webpage



The Toolkit webpage will include:

- Further information on the benefits the toolkit has for users
- Information on how this toolkit differs and relates to similar resources and tools aimed at supporting PIE activities. This is a practical toolkit. It is not replacing other resources, instead it works with them.
- A visual representation of how the toolkit fits into the researcher journey from developing a project idea to dissemination and evaluation.

Next steps



Following the extensive consultation process and subsequent revisions to the PEDRI GPS Toolkit, we have outlined the following next steps to ensure effective implementation, continued improvement, and sector-wide adoption:

1. **Publication:** We will create a dedicated page on the PEDRI website and publish the Toolkit.
2. **Online toolkit development:** We have received funding to develop an online version of the Toolkit. We will be creating this at the start of 2026.
3. **User engagement and feedback:** PEDRI funded projects will be required to use the toolkit throughout the duration of their project. We will gather further feedback on and assess usability of the Toolkit with project teams.
4. **Training and support resources:** We will collaborate with the Learning and Development/Resources Lead to develop training materials to guide users in applying the Toolkit effectively.
5. **Knowledge sharing:** We will be collecting and publishing case studies to demonstrate how the Standards are being adopted and foster shared learning. We will explore different mechanisms for users to share learnings and reflections.

Appendices

Appendix 1 – First draft of Toolkit

The first draft of the toolkit, initially presented as an Evaluation Tool, can be found on Box: <https://hdruk.box.com/s/t5mx9718fwi0ny1thyr9hnxhv8s0fu8d>

Appendix 2 – Prompt questions for consultations

Prompt questions for consultations (June – October)

1. How useful do you think the Evaluation Toolkit would be for your work? Are you currently using, or have you used, any tools to support your PIE activities?
2. Is the purpose and structure of the toolkit clear and easy to understand?
3. Does the distinction between the Full Journey Log and the Journey Snapshot make sense for different project types?
4. Are the components (Objectives, Key Results, Activities, etc.) relevant and complete for your needs?
5. Is the guidance easy-to-follow for completing the toolkit?

6. Would you prefer to use the toolkit in a particular format (e.g. online, Word, spreadsheet)?
7. How practical do you think it will be to integrate this toolkit into your current work?
8. What improvements or additional resources would help make the toolkit more effective?
9. Is there anything missing or any concerns you have about the toolkit?

Prompt questions added to existing list (included in consultations from 20 August)

1. Positioning of the tool: The tool is currently described as an evaluation tool. It focuses on planning towards impact, but it also includes space to record impact.
 - a. How do you see this positioning?
 - b. What role, if any, do you think signposting or including of further guidance on impact assessment or evaluation frameworks could play in the tool?
2. Use of GPS Standards: The GPS Standards include both a definition and details of what they entail.
 - a. How might this approach be applied in the tool, if at all?
 - b. In what ways, if any, could incorporating such definitions or examples be helpful?
3. OKR system and reflections: The OKR system often focuses on quantitative results, while the tool also makes space for qualitative reflection.
 - a. How do you view the balance between quantitative and qualitative information in this context?
 1. What value, if any, do you see in including both?
4. Scope of standards: Organisations may choose to work with one, several, or all of the standards.
 1. How do you think the tool could reflect or support these different approaches?
 - b. What are your thoughts on whether and how the tool might capture an organisation's reasoning for its chosen approach?

Appendix 3 – Updated Toolkit ahead of ADR UK Conference Workshop



The updated toolkit can be accessed on Box:

<https://hdruk.box.com/s/xcvie1fppw9gp1tyzno444w9b2ega25>

Appendix 4 – Consultation survey questions

1. Which of the below statements best describes you? Tick all that apply.
 - I am involved in managing data or work for an organisation that manages data
 - I use data for research purposes
 - I am a public involvement and engagement professional
 - I am involved with an organisation or group who represent members of the public
 - I am a member of the public
 - Prefer not to say
2. On a scale of 1-5, how likely is it that you would use the toolkit in your own work?
 - 1 “Not likely at all” – 5 “Very likely”
 - If you would like to, please explain your response.
3. Are you currently using, or have you previously used, any tools to support you in planning or evaluating your PIE activities or projects?
 - Yes/No
 - If yes, which tools? What did you find useful and not so useful about these tools?
4. Do you think the toolkit could be used for different levels of activity e.g. project-level and organisational-level?
 - Yes/No
 - If not, what needs to be included or changed to ensure it can be used for different levels of activity?
5. Is there anything else that you would like to say about the toolkit, for example, suggestions for improvement?