



Measures of Wellbeing Report

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Commissioned by Blue Apple Theatre Company.

Blue Apple Report on Measures of Wellbeing

SUMMARY

This Blue Apple report aimed to:

Provide information regarding the ways in which Blue Apple could effectively demonstrate their impact on the wellbeing of their participants.

Research Objectives were:

Investigate the ways in which stakeholders felt wellbeing should be measured by Blue Apple.

Investigate current literature regarding measures of wellbeing.

Synthesise and report findings.

Findings:

Overall, Blue Apple delivered vibrant, attractive experiences to a diverse range of people. A range of activities were offered, the content of which were found to positively impact wellbeing. More than this, the ethos of Blue Apple was found to influence delivery of activities in ways which increased wellbeing. Stakeholders identified aspects of wellbeing which they felt should be measured. Suggestions are made regarding ways in which Blue Apple could achieve this.

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Introduction

Blue Apple: Ambitious theatre, dance, singing and film by learning disabled performers

This report was commissioned by The Blue Apple Theatre Company. Blue Apple wished to create an effective and timely measure of wellbeing in order that they could demonstrate the impact of their work on the lives of their participants: people with intellectual disabilities.

This report starts with a review of the literature, then presents the method, analysis and results of the research project. A short discussion is then provided which briefly summarises some of the options Blue Apple may wish to consider in deciding its definitions, measures and assessment of the impact it has on wellbeing. A brief conclusion follows. Appendices 1-9 then include a range of some of the most common/ applicable examples of different measures of wellbeing. Appendices 10,11 and 12 contain freely available resources which give examples of ways in which different organisations can assess the impact of an intervention. Although these relate to employees or people having undertaken learning opportunities/training, they may be helpful for informing the types of evaluation questions and techniques Blue Apple may want to consider. A bibliography is also provided.

Although this report was commissioned to report on measures of wellbeing which stakeholders considered to be important, aspects of service evaluation were also reported by most stakeholders. These are included in this report in order to provide additional information to aid decision-making about Blue Apple's current and future plans and activities. In addition, although this research project was commissioned to include only a review of the literature and measures already found by Blue Apple, a wider review of academic literature was agreed in response to lower number of stakeholders being involved than was originally planned.

This report was not intended to assess different tools that different organisations may use to measure their impact on wellbeing. It was intended to ascertain what aspects of wellbeing Blue Apple stakeholders felt should be measured.

Background Literature

1. Defining Wellbeing

It is imperative to be concerned with every individual's wellbeing for the benefit of society and not just for adults or people who might be vulnerable in some way (Rees *et al.*, 2010; McLellan & Steward, 2015) since national wellbeing could be the aggregate of individual wellbeing (Tabor & Stockley, 2018).

Gennings has investigated wellbeing as a concept (2021, 2022). She suggests wellbeing is holistic and concerned with many constructs so understanding wellbeing can be difficult. It is therefore often used interchangeably with ideas such as happiness and life satisfaction (Dodge *et al.*, 2012; Bowling, 2017; Goodman *et al.*, 2017; Kelly, 2018). Stevens and Jarden (2019) show that although influences on wellbeing are unique to individuals, it has core similarities between people, providing support for the idea that a definition of wellbeing needs to be all-encompassing. A definition of wellbeing should therefore be holistic and align with the idea that wellbeing is multidimensional (Lijadi, 2018; Boyko *et al.*, 2017; Ryff, Morozink-Boylan & Kircscstates, 2021). The World Health Organisation consider positive mental health as the foundation for wellbeing (World Health Organization, 2005). Galderisi *et al.* (2015, p 231) supports this, defining mental health as, "A state of wellbeing in which the individual realizes his or her own abilities, can cope with the normal stresses of life, can work productively and fruitfully, and is able to make a contribution to his or her community".

Definitions of wellbeing found within the academic literature are presented below:

- The balance point between an individual's resource pool and the challenges faced (Dodge et al., 2012)
- A broad category of phenomena that includes people's emotional responses, domain satisfactions, and global judgments of life satisfaction ... We define SWB as a general area of scientific interest rather than a single specific construct (Diener et al., 1999)
- A state of being with others and the natural environment that arises where human needs are met, where individuals and social groups can act meaningfully to pursue their goals, and where they are satisfied with their way of life (Pouw and McGregor, 2014)
- Personal wellbeing measures are grounded in individuals' preferences and take account of what matters to people by allowing them to decide what is important when they respond to questions (Tabor and Yull, 2018)
- The Oxford Dictionary (2015) describes wellbeing as "the state of being comfortable, healthy, or happy".
- A definition of wellbeing is 'elusive' (Bharara et al., 2019) and 'ill-defined' (Bourke & Geldens, 2007).
- Wellbeing is broad and multidimensional (Hone et al., 2015).
- The Care Act (2014) defines wellbeing as being concerned with:

(a) personal dignity (including treatment of the individual with respect);

(b) physical and mental health and emotional well-being;

(c) protection from abuse and neglect;

(d) control by the individual over day-to-day life (including over care and support, or support, provided to the individual and the way in which it is provided);

(e) participation in work, education, training or recreation;

(f) social and economic well-being;

(g) domestic, family and personal relationships;

(h) suitability of living accommodation;

(i) the individual's contribution to society.

- 'Happiness, Fun and Excitement' are a key theme in wellbeing (Godfrey et al., 2015)
- The key difference between wellbeing and happiness is that wellbeing is relatively stable and happiness not (Children's Society, 2019).

2. Wellbeing and Relationships

Our relationships with others significantly affect how we feel about ourselves, and this is no different for people with intellectual disabilities (Goffman, 1962; Edgerton, 1993). Harrison et al. (2021) have suggested the numerous ways in which social networks, defined as 'opportunity structures which may or may not provide support' or 'positive interpersonal relationships' are important to people with intellectual disabilities. Harrison et al. found that social networks are key to social identity, social functioning, self-esteem and quality of life, are associated with happiness, self-confidence, mental health, and leisure activities and are deemed crucial for facilitating social inclusion and that austerity can negatively impact wellbeing (NIHR, 2021).

There is a universal association between wellbeing and the quality of relationships individuals have with each other (Ryan & Deci, 2001). Models of wellbeing such as PERMA (Seligman, 2004) and 5-Ways to Wellbeing (Government Office for Science, 2008 [online]) have included connections and relationships as improvers of wellbeing. Social capital is an important concept in relationships. It describes individuals who can co-operate with others enabling them to achieve mutually beneficial goals (Schulenkorf, 2013). Putnam (2001) suggests that social capital is the most important

contribution towards a healthy society, and it is influential on the overall balance of individual's wellbeing. It is important to have meaningful relationships to fulfil an individual's competency, relatedness and autonomy, which Ryan and Deci (2001) suggest has a positive impact on wellbeing. They also suggest social relationships are a basic need for all humans. A factor influencing wellbeing and stress management is social connection and support, including with teachers, mentors, and peers (Grant and Kinman, 2013). For example, as humans we value being able to speak to peers and share common experiences (Hardy, 2020; Bøe and Debesay, 2021) and to have debriefs on our performance (Galvin et al., 2015). Furthermore, feeling welcomed by the staff in workplaces and having a sense of belonging is also important to people for their wellbeing (Brown et al., 2020; Cant et al., 2021). The inclusion of social capital in a holistic definition and in the measurement of wellbeing for all populations therefore seems key (Lijadi, 2018).

3. Considerations around Wellbeing

There are a range of ways in which attempt to capture and measure wellbeing. Some key considerations are highlighted below.

Life satisfaction. Questionnaires can be used to consider life satisfaction. These require individuals to accurately assess their life and report/score it (Lucas et al, 2016). These reports/scores can change depending on the context or the mood someone is in when asked to judge their life satisfaction. Redelmeier et al. (2003) has shown that the way an experience ends can influence an individual's perception of the whole experience. For example, if a bad experience ends well, then an individual would not necessarily perceive the experience to be as bad as if it had ended badly. Context and experiences such as good weather, finding a coin or seeing a wheelchair-user can also reportedly influence a person's judgement (Alexandrova, 2017). Seligman (2012) states that an individual's mood at the time s/he/they are asked about their wellbeing, determines around 70% of how life

satisfaction is perceived and so suggests being asked about wellbeing merely measures how cheerful someone is at the time of the question.

Physical Health Similarly Dodge et al. (2012) argue that optimal wellbeing cannot be achieved without having good physical health. Tabor and Yull (2018) suggest the most important factor which influences wellbeing is how people view their health, not their actual health. Self-reported health has been associated with self-compassion, happiness, life satisfaction and reduced stress (Martin et al., 2022) self-efficacy (perception of personal competence), optimism (a positive orientation towards the future), emotional intelligence (EI) (the ability to process emotional experiences) and self-care (actions to promote wellbeing) (Hughes et al., 2021). Attendance and retention data are also indicators of enjoyment. However, assuming attendance is a marker of enjoyment is not a reliable assumption, as parents or staff can be a key determinant as to whether people attend activities. This can be a particular factor for people with intellectual disabilities who have less access to finances and transport (Harrison et al., 2021). Evidence therefore unsurprisingly suggests that visible pathways (such as family, staff and friends) and hobbies (such as drama, dance, singing and other physical activities) are often linked to improving mental and physical health.

Mental Health A common theme within protective factors such as resilience and self-care is self-compassion: the ability to notice suffering in oneself and others, as well as a commitment to act kindly in response to this. Self-compassion has also been defined as a skill that can be taught (Martin et al., 2022) and has been associated with positive mental health (Dev et al., 2018; Kotera et al., 2021).

Positive psychological functioning is therefore an element of wellbeing and wellbeing measurement (Dodge et al., 2012; Manning-Morton, 2013; Kelly, 2018; Lijadi, 2018) and can promote length of life and reduce risk of disease (Lijadi, 2018). For children and adolescents in particular, it is important to

establish emotional attachment in order to develop psychological resilience for adult life (Underdown, 2006). Negative mental health is related to mental illness such as depression and anxiety, which can have an adverse impact on wellbeing (Steptoe et al., 2015). The mental wellbeing of people with intellectual disabilities has been shown to be negatively impacted by the effects of austerity policies and by the ways in which they feel they are perceived by others. This is often stigmatising, which further negatively impacts wellbeing. Improving the mental wellbeing of people with intellectual disabilities is then vital for their overall wellbeing (Harrison et al., 2021).

4. Measures of Wellbeing

In their review of 99 self-report measures of wellbeing and development over time, Linton et al. reported that the most used measures were reported as being the **World Health Organization Wellbeing measure** (Appendix 1) and **Diener's Model of Subjective Wellbeing (1984)** (Appendix 2). The Office for National Statistics has a short questionnaire regarding **Personal wellbeing** (Appendix 3). The **Warwick and Edinburgh Mental Wellbeing Scale** is a short measure of wellbeing (Appendix 4). In **UNICEF's** report (2020) on child wellbeing in developed countries three dimensions are identified: mental wellbeing, physical health, and academic and social skills (Appendix 5). **PERMA** includes 5 pillars of flourishing using flexible measures (Sellgman, 2004, Appendix 6) and **5-Ways to Wellbeing** (Government Office for Science, 2008 [online], Appendix 7) includes connecting, being active, taking notice of one's own feelings, learning new skills and taking part in social/community life (based on Aked et al., 2008). The **Winchester Wellbeing Scale** (Gennings 2021, Appendix 8) was also developed to measure wellbeing across a wider range of contexts.

Scales to measure connectedness and enjoyment exist, such as the **Physical Activity Enjoyment Scale** (Moore et al., 2009). The use of these and other measures is important to help distinguish from precisely what aspects of physical activity intervention individuals are gaining positive benefits. In

addition, these intervention studies are conducted with groups of individuals experiencing the same physical activity at the same time, therefore, including a measure of social connectedness could also be important in some cases, such as the **MacArthur Scale of Subjective Social Status** for example (Adler & Stewart, 2007).

Ekeland, Heian and Hagen (2005) and Lubans et al. (2012) reviewed studies which focused on the impact of exercise interventions to improve wellbeing. The development of a tool to measure wellbeing could be used to keep track of goals, encourage sustained attention, fuel advocacy, and provide warning of failure (Ben-Arieh, 2008). Since the 1950s, objective measures such as **Gross Domestic Product** (GDP) and **crime rates** have been used in the assessment of wellbeing, but Brown, Abdallah and Townsley (2018) argue that subjective measures more meaningfully reflect individual's level of wellbeing. Subjective measures are needed so policy goals, public support and interventions can be based on what people actually want and need (Bowling, 2017).

Typically measures of wellbeing include physical, psychological, spiritual, social, basic needs, balance, happiness, economic and satisfaction factors. Experience, subjective satisfaction, quality of life and flourishing can be also be measured using: **U-Index; Positive and Negative Affect Scale; SPANE; Subjective Happiness Scale; Affect Intensity measures, Satisfaction with Life Scale; Cantril Ladder; Domain Satisfaction, PERMA; Psychological Wellbeing Index; Flourishing Scale; Warwick and Edinburgh Mental Wellbeing Scale, Human Development Index and/or Dasgupta's index** (Alexandrova, 2017). Other measures include the **Self-Evaluated Quality of Life Questionnaire** (Ventegodt et al., 2003), **the Subjective Vitality Scale** (Ryan & Fredrick, 1997) and **Students' Life Satisfaction Scale** (Huebner, 1991).

In relation to creating measures with and for people with intellectual disabilities, Cummins et al suggestions for measuring and **Enhancing the Quality of life of people with intellectual disabilities** (2011, Appendix 9) found that questions should be specific and based on today's events only. The use of pictures and drawings as prompts, preferably chosen or drawn by people with intellectual

disabilities themselves, can aid understanding of questions and scales. The **Glasgow Anxiety Scale** (GAS) (Mindham & Espie, 2003) can be used to rate participants' anxieties. The Glasgow Anxiety Scale has been judged to be robust with good test-retest reliability (Mindham & Espie, 2003, p.22) and has been successfully used by Young et al. (2016) and Bourne et al. (2021) amongst others.

Dagan & Sandhu's (1999) adaptation of Rosenberg's **Self-esteem Inventory** can be used to collect data regarding participants' self-esteem. This has been used extensively in many international studies and was recently assessed as having robust internal consistency as well as strong content, convergent and discriminant validity (Syropoulou et al., 2021).

The **Social Network and Employment Scale (SONES)** (Forrester-Jones et al., 2006) can be used regarding details of daily lives, including activities and social networks. This includes asking participants how many people they know across a wide range of personal, casual and professional areas of their network and how often participants saw those network members. The Social Network and Employment Guide has been validated and successfully used previously by Forrester-Jones et al. (2006) and later by Bhardwaj et al. (2018) and White and Forrester-Jones (2019).

Lastly Schalock and colleagues' **Personal Outcomes Scale** (Claes et al., 2012) can be used to ask participants to rate their satisfaction with different aspects of their quality of life. The Personal Outcomes Scale has been successfully validated as having reliably strong etic and emic properties across a range of international settings by Jenaro et al. (2005). It has also been widely used and positively reviewed for its validity, reliability and generalisability in a range of studies (Gomez et al., 2011).

5. Use of Scales in Wellbeing Measures

Different scales of measurement can be used with different groups and for different reasons. These can be briefly summarised in the table by Gennings (2021) below:

Scale Type	Advantages	Disadvantages
Likert Scale	<ul style="list-style-type: none"> - Reliability increases up to a seven-point scale then becomes level. - Easy and quick to construct. - Items can be equally balanced, so favourable responses are not endorsed. - They can measure anything. 	<ul style="list-style-type: none"> - As it is ordinal, the magnitude of differences between scores cannot be determined. - The measure has no true zero which compromises validity.
Guttman	<ul style="list-style-type: none"> - The target population is involved with the development and organisation of the scale. - The scale appeals to common sense. - Items are ordered into a hierarchy of severity, making it easier to identify items which should be removed. 	<ul style="list-style-type: none"> - As it is ordinal, the magnitude of differences between scores cannot be determined. - There is a restricted number of statistical tests that can be used for analysis. - The items correlate perfectly with the total scale score which is unlikely of any variable in the real world.
Semantic Differential	<ul style="list-style-type: none"> - Young children have been shown to be capable of responding to this scale. - It is used to measure an individual's feelings/attitude. - Items are equally balanced. 	<ul style="list-style-type: none"> - Values which fall outside of the centre scale are difficult to interpret.
Thurstone's Scale	<ul style="list-style-type: none"> - A representative sample from the relevant population are used to judge the severity of each item in the scale. 	<ul style="list-style-type: none"> - Two respondents can have the same score from a different pattern of responses. - As it is ordinal, the magnitude of differences between scores cannot be determined.
Visual Analogue Scale	<ul style="list-style-type: none"> - The scale is simple to use and understand. - At seven years old, a child can handle the cognitive demands of a visual analogue scale. - Champion <i>et al.</i> (1998) report good validity for these scales with 5-year-olds. 	<ul style="list-style-type: none"> - This method provides an illusion of precision. There is no guarantee that the response accurately represents the underlying attribute. - Rating highly dependent on wording of end points. - Reliability of the scale is directly related to its length.
Face Scale	<ul style="list-style-type: none"> - Can be used in different countries if no words are used and faces are gender/ethnically neutral. - Due to simplicity, they are often used with children. 	<ul style="list-style-type: none"> - Boys in some cultures for example may be biased towards not picking a crying face.

The Research

1. Method

Key stakeholders were interviewed face-to face either in person or via telephone or virtually. One 'Apple Talk' session was observed where Blue Apple participants, staff and other stakeholders were invited to share their thoughts regarding Blue Apple generally. Four different Blue Apple sessions were observed in full or in part. Interviews took between twelve minutes and one hour five minutes. The views of twenty-five people were elicited, and verbatim notes were made. Sixteen people with intellectual disabilities, five people employed or engaged by Blue Apple and 4 parents were asked questions designed to elicit responses regarding the ways in which Blue Apple was felt to influence the wellbeing of people with intellectual disabilities.

All names used in this report are pseudonyms. All statements in quotations marks "" are direct quotes from stakeholders.

2. Analysis

Braun and Clarke's (2022) six-stages were used to thematically analyse results. Codes were created from the gathered data and these generated key themes. These themes were: Learning Communication Skills; Learning Other Skills; The Benefits of Relationships; Relationships and Feeling Valued; Unique Opportunities Making Participants feel Special; Improved Confidence; and Improved Mental Wellbeing.

Results are presented below.

3. Results

Key themes and subthemes are presented below in ways which may aid easy measurement of impact on wellbeing by Blue Apple. Learning a range of new skills, particularly communication skills, was a significant factor in the lives of Blue Apple participants. Whether participants had attended for many years or were new to Blue Apple, all gave examples of the range of skills they had learned and were continuing to learn.

[Section One](#) considers [Learning New Skills](#). This includes Theme One which covers some of the key skills which were identified as positively impacting wellbeing, in particular Communication Skills, and Theme Two which considers Learning Other Skills.

[Section Two](#) considers [Relationships](#). It includes Theme Three which reports on The Benefits of Relationships and Theme Four which considers Relationships and links between positive relationships and feeling valued.

[Section Three](#) considers [Mental wellbeing](#). It includes Theme Five which covers the ways in which the Unique Opportunities which Blue Apple offers Makes Participants feel Special; Theme Six which relays stakeholder views regarding Improved Confidence; and Theme Seven which reports specifically on the ways in which stakeholders defined and measured their mental wellbeing and felt Blue Apple positively impacted and Improved Mental Wellbeing.

[Section 4](#) offers [Additional Suggestions](#) from stakeholders regarding possible wellbeing measures and future directions.

[Section One: Learning New Skills](#)

Learning new skills was identified by stakeholders as an important difference to wellbeing which Blue Apple offered. There were a wide range of skills that people had learned and were learning. The process of learning these skills was described in different ways, and learning new skills was described by many as very challenging. This learning went far beyond what may be assumed would be taught

as part of a theatre group which supports people with intellectual disabilities. Crucially it was not simply the skills learned but the combination of learning skills and being offered the opportunity to learn new skills which was considered most effective in terms of promoting wellbeing.

Theme One: Learning Communication skills – Learning a range of communication skills at Blue Apple was discussed by every participant as a key improvement in their lives and wellbeing. These skills were separated into subthemes which included: speech and language skills; skills in communicating with others; and skills around learning to stop actions which interrupted communication. Every Blue Apple participant stated their communications skills had improved as a direct result of their involvement in Blue Apple.

Speech and language skills

Speaking clearly

Using different voices

Projecting one's voice

Working with words

Singing

Learning how to pronounce words

Practicing lines and words to songs

Writing words

Making up our words to plays

Creating new lines to songs

Skills in communication with others

Listening to directions learning how to represent things, feelings and people

Listening to one another

Following instructions

Responding to prompts

Taking turns

Mime and improvisation for people who do not use speech

Skills in stopping actions which interrupt communication

Not interrupting

Not talking too much

Not going off on a tangent

Not speaking over other people

Theme Two: Learning a range of other skills

This theme presents a range of other skills which participants listed as important to their wellbeing.

These include memory skills; learning about commitment; learning about emotions; learning physical skills; learning other life-skills. One stakeholder expressed the views of many “Changes in people’s abilities are incremental. Seemingly small successes may take years but are highly significant, they matter”.

Learning Memory Skills

Counting

Learning lines

Learning the meaning of words

Longer scripts develop my memory

Creating ways to help me learn- record lines on audio and listen back to them through the day

Remembering what to say next

Use of photos to aid memory

Learning about Commitment

Commitment to performance

Idea of working

Being prepared for sessions

Learning about Emotions

Learning about body language and emotions

Understanding moral messages

Showing appropriate emotions
Showing appropriate facial expressions
Being honest

Learning Physical skills

Learning how to dance
Learning how to move my body
Controlling one's breath
Dance helps with coordination and learning the difference between left and right
Copying the movements of others

Learning Other Life skills

Being ready for taking action
Focus
Learning about timing
Ordering of time
Learning to count
Considering a range of ideas
Making choices
Coming up with new ideas
Dealing with new ideas and change
Creative thinking

Section Two: Relationships

The opportunities Blue Apple offered to undertake activities with others were highlighted consistently as vital by stakeholders throughout this study. Themes in this section relate to the benefits of relationships and the ways in which positive relationships can influence participants feeling of being valued.

Theme Three: The benefits of relationships

The opportunity to start, build and maintain relationships with a range of other people was reported as having a positive impact on wellbeing by every person who took part in this research project.

Subthemes are: making and enjoying relationships with other Blue Apple participants; learning skills in working with others; and having a relationship with the audience.

Jessica for example explained Blue Apple was, “Good for friendships- most of us wouldn’t be as close as we are now without Blue Apple”.

Making and enjoying relationships with other Blue Apple participants

Meeting new people

Respect for others

Learning how to start and maintain personal relationships and friendships

Fun with others

Helping others with lines

Helping others with their roles

Performing with friends

Complimenting others

Interacting with others

Speaking to one another

Sharing experiences

Looking out for one another

Seeing Blue Apple friends outside of Blue Apple

Joining in with others (whether one uses speech or not)

Creating memories with others

Talking to my friends

Doing shows with my friends

Learning skills in working with others

Sharing ideas

Watching others and seeing others acting

Being flexible
Being adaptable
Involvement in a project with others
Teamwork
New ways to interact
New ways to exchange ideas
Politeness in interactions with others
Tolerance of others
Helping others to perform
Sharing ideas including singing lines with one another
Working on scripts together
Adapting to different approaches of different teachers
Collaborating
Directing others

My Relationship with the audience

Interaction with audience – feels like I’m a good actor
Performing when family are in the audience
Performing for others

Theme Four: Relationships and feeling valued

Blue Apple participants also reported for themselves, and other stakeholders agreed, that Blue Apple gave participants a sense of feeling valued. This was considered to be important for wellbeing as participants felt they were: being heard; being seen; and being part of something bigger than themselves. When speaking about feeling valued, Adam explained, Blue Apple “*is our Blue Apple*”.

Being heard

Having a voice
Being listened to
Being paid attention to

Being given choices

Being asked what I think

Being seen

Being seen on stage

Being seen in important places (stages and internationally)

Being in big shows

Going on stage

Being in a 'proper' play

Seeing an audience watching you

Getting attention as a performer from the audience

Being seen as relevant

Speaking to important people (nationally and internationally)

Seeing oneself on film

Having a wider network with other companies through Blue Apple

Being part of something bigger than myself

Skilled teachers/ being taught by professionals

Blue Apple is a famous/ specialist company

Section Three: Mental Wellbeing

Participants gave examples of the range of ways in which they felt their mental wellbeing was improved as a result of their engagement with Blue Apple. This was related to: feeling that participants were gaining unique opportunities (which made them feel special); the ways in which their confidence had increased; and the ways in which their mental wellbeing had demonstrably improved.

Theme Five: Unique opportunities at Blue Apple make me feel special

Blue Apple was felt to fill a gap in service provision and offer a unique range of opportunities to people with intellectual disabilities. Being offered opportunities not available elsewhere was highlighted as positively influencing wellbeing. Jacob explained, “Blue Apple is different from the rest of my week, it’s a different place to be”. Ellen stated, “You can be yourself here”.

The types of opportunities most commonly reported are listed below in terms of: specific activities undertaken only at Blue Apple; opportunities to express oneself in different ways and being in an inclusive atmosphere.

Specific activities

Playing different parts

Using personal experience from own life and relaying this to work at Blue Apple

Learning about different disabled people and their needs

Being challenged to learn to represent something you are not

New games

Making up a play

Editing plays

Creating own songs

Opportunities to express oneself in different ways

Being creative

Being artistic

The opportunity to be innovative

Inclusive atmosphere

Inclusion of disabled people

Friendly atmosphere

Relaxing atmosphere

Being with people other than those who are paid to support to me in the rest of my life

Helpers and teachers help us with relationships and all sorts of other issues

Theme Six: Improved Confidence

All participants gave examples of the ways in which their confidence had significantly improved since they started attending Blue Apple. These related to: being able to relate one's increased confidence in a range of different areas of one's life; and having aspirations. Monica gave examples "Blue Apple gave me the confidence to do things I wouldn't have done before. Even if I had had the opportunity before, I wouldn't have done it without the confidence Blue Apple gave me. Travelling alone, using the bus or walking alone, meeting others halfway to Blue Apple and walking together". Ella too felt Blue Apple had taught her how to improve her own confidence in other areas of her life "Blue Apple taught me to think of your hero then you can do whatever you want and get over your fear".

Using confidence in different areas of my life

Playing a role gives me confidence to pretend to be confident in my real life

Speaking up for myself

Confidence linked to ability outside of Blue Apple to do jobs and volunteer

Finding other classes and courses to continue widening my interests and activities

Talking to shopkeepers

Speaking up for myself when I'm not happy outside of Blue Apple as people are supportive here when I put forward ideas.

Doing accessibility audits for other organisations

Chairing meetings

Independence- I'm not so tied to family or relations- I can do more things myself

Being a boss on stage is linked to being able to be a boss in real life

Improvising when in new situations

Using photos of myself taking part in plays and showing these to other people so they can see what I have done and what I can achieve

Using drama skills

Teaching others signing

Aspirations

To have a career as an actor

To be on stage
To perform more
To get bigger roles

Theme Seven: My mental wellbeing has improved

Stakeholders identified the range of improvements in mental wellbeing they could see in themselves and in others. Eric explained Blue Apple helped participants to be “Living to the fullest of our awesome abilities”. In this theme stakeholder definitions of mental wellbeing are provided, as are stakeholder views on what good mental wellbeing means and what (in addition to the other factors already provided) is required for good mental wellbeing to flourish.

Definitions of mental wellbeing

Being positive
Feeling happiness
Feeling in control
Feeling empowered
Feeling nurtured
Feeling challenged

What good mental wellbeing means

Learning to trust other people
Being able to reach out to others
Loss of nervousness
Growing maturity
Doing serious work
What I do here matters
Experiencing empathy from others

What good mental wellbeing needs

Safe space
Therapeutic atmosphere

Being treated as an equal

Knowing I will not be judged

Blue Apple needs to always be there as it's part of people's routines and lives

Routine and structure, in particular when other things are changing

For the future

Participants were keen to have opportunities created for them in order to mix with one another socially. A summer picnic and opportunities to get together before sessions were suggested as ways in which this could happen.

Blue Apple could evaluate the level of need of participants in order to be able to better meet particular needs and make decisions about whether Blue Apple and participants are a good match.

Blue Apple may be trying to spread itself and its staff too thinly. Feelings were expressed that Blue Apple staff were extremely well-qualified experts who were all trying to do too much, certainly more than they had time to achieve. In this vein it was felt by some that it would be beneficial for Blue Apple to stay smaller with specific aims in order that it not lose its uniqueness and that Blue Apple needed a CEO who was dedicated to just that role.

Some stakeholders who were not participants queried the level to which Blue Apple could be even more inclusive and promote equality in terms of the types of performances chosen and the ways in which different audiences could be attracted.

The importance of providing a range of challenging activities was raised.

Discussion

It is clear from this research that Blue Apple stakeholders felt Blue Apple was offering a range of highly appropriate, valuable, unique set of experiences and opportunities to people with intellectual disabilities. It was evident that stakeholders felt Blue Apple had positive effects on many aspects of wellbeing of participants. Participants were able to provide examples of the ways in which they measured their own wellbeing. These could be summarised as, but are not limited to:

Learning new skills

Demonstrating one's abilities

Being in reciprocal relationships with other people

Having a sense of purpose

Feeling valued

Gaining confidence

Being active

Recognising one's own feelings and regulating one's behaviour

Being creative

Improved independence

These could be measured in different ways and clearly link to several different measures already offered in the literature review and appendix to this report. Measures within the above headings could relate to those identified by participants. Certainly a pilot use of measures, as Blue Apple wishes to undertake, could introduce these or other measures on a small scale to assess the applicability of both measures and ways of collecting these. A short set of measures using tool which is electronic and simple to use would be preferred by participants. Whether assessment will be undertaken by individual participants themselves or via observation by teachers/workers should also be considered. There was an appetite from participants to be asked about each session at the end of that session, and an awareness that this would take time from what were considered to be precious activities.

Analysis suggests that Diener's Model of Subjective Wellbeing (1984), the Warwick-Edinburgh Mental Wellbeing Scale (WEMWBS), PERMA, and 5 Ways to Wellbeing contain aspects which Blue Apple stakeholders feel are already being met. Basing measurement on one or a mixture of these models could add validity to any future claims made regarding the impact of Blue Apple on the wellbeing of participants.

This research has found that there are a significant range of ways in which Blue Apple was felt to improve the wellbeing of participants and that there are a range of ways in which Blue Apple could measure this impact.

Limitations

Although this research engaged with a large number of stakeholders, it was designed to interview more stakeholders than took part. Those who engaged volunteered to take part. It may be then that those who engaged did not represent different perspectives on whether or not Blue Apple positively influenced wellbeing, or how wellbeing should be measured.

Different techniques for soliciting views may have yielded different results. Online questionnaires and/or focus groups may have been effective ways to solicit the views of stakeholders with and without intellectual disabilities. While face to face interviews (whether in-person or virtual) take significantly more time than questionnaires or focus groups, they typically do yield more data in greater depth than the other alternatives which were considered.

Stakeholders were able to express their views. Parents were included as consultees for some participants who had communication difficulties. A broader range of people with a range of intellectual disabilities may therefore have also yielded different results.

Conclusion

This research was intended to investigate the ways in which stakeholders felt wellbeing was impacted by participating in Blue Apple activities. It also provided a small service evaluation of Blue Apple's provision, which indicated that stakeholders viewed Blue Apple's provision favourably.

Blue Apple stakeholders reported a diverse range of ways in which participating in Blue Apple activities positively impacted their wellbeing. Analysis has identified seven key themes with related subthemes, regarding these impacts and their effects. Wellbeing as defined by Blue Apple stakeholders involves Learning Communication Skills, Learning Other Skills, The Benefits of Relationships, Relationships and Feeling Valued, Unique Opportunities Making Participants feel Special, Improved Confidence and Improved Mental Wellbeing. These could be aggregated into possible measures of wellbeing: Learning new skills; Demonstrating one's abilities; Being in reciprocal relationships with other people; Having a sense of purpose; Feeling valued; Gaining confidence; Being active; Recognising one's own feelings and regulating one's behaviour; Being creative; and Improved independence.

Statements from stakeholders and a range of different measures already published have been included which provide opportunities for questions to be devised which can measure these aspects of wellbeing in ways which most benefit Blue Apple.

Appendices

Appendix 1

World Health Organization Quality of Life Domains and Facets WHOQOL-100 DOMAINS AND FACETS (2012)

Domain I Physical Capacity

- 1 Pain and discomfort
- 2 Energy and fatigue
- 3 Sleep and rest

Domain II Psychological

- 4 Positive feelings
- 5 Thinking, learning, memory and concentration
- 6 Self-esteem
- 7 Bodily image and appearance
- 8 Negative feelings

Domain III Level of Independence

- 9 Mobility
- 10 Activities of daily living
- 11 Dependence on medication or treatments
- 12 Work capacity

Domain IV Social Relationships

- 13 Personal relationships
- 14 Social support
- 15 Sexual activity

Domain V Environment

- 16 Physical safety and security
- 17 Home environment

- 18 Financial resources
- 19 Health and social care: accessibility and quality
- 20 Opportunities for acquiring new information and skills
- 21 Participation in and opportunities for recreation/ leisure activities
- 22 Physical environment (pollution/noise/traffic/climate)
- 23 Transport

Domain VI Spirituality/Religion/ Personal Beliefs

Overall quality of life and general health perceptions

WHO -5 Questionnaire

The WHO-5 questionnaire

Instructions:

Please indicate for each of the 5 statements which is closest to how you have been feeling over the past 2 weeks.

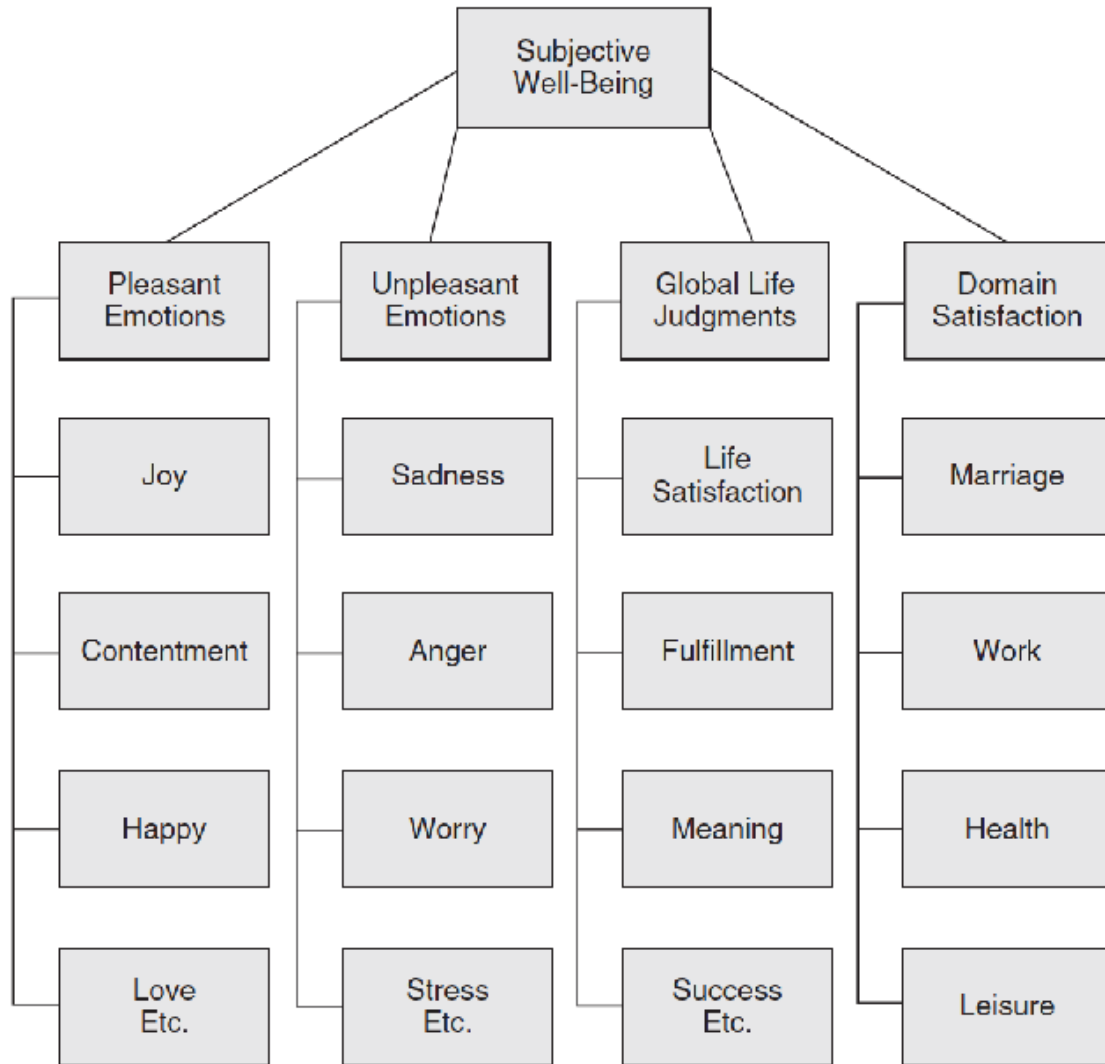
Over the past 2 weeks...	All of the time	Most of the time	More than half the time	Less than half the time	Some of the time	At no time
1 ... I have felt cheerful and in good spirits	5	4	3	2	1	0
2 ... I have felt calm and relaxed	5	4	3	2	1	0
3 ... I have felt active and vigorous	5	4	3	2	1	0
4 ... I woke up feeling fresh and rested	5	4	3	2	1	0
5 ... my daily life has been filled with things that interest me	5	4	3	2	1	0

Scoring principle: The raw score ranging from 0 to 25 is multiplied by 4 to give the final score from 0 representing the worst imaginable well-being to 100 representing the best imaginable well-being.

The 5-item World Health Organization Index (WHO-5) is a reliable and valid instrument to capture mental health problems such as depression and anxiety. It is constructed by adding the scores of the following five items: • ‘I have felt cheerful and in good spirits’ • ‘I have felt calm and relaxed’ • ‘I have felt active and vigorous’ • ‘I woke up feeling fresh and rested’ • ‘My daily life has been filled with things that interest me’.

Appendix 2

Diener's Model of Subjective Wellbeing (1984)



Appendix 3

ONS4 Personal (Subjective) wellbeing harmonised standard

Available at <https://analysisfunction.civilservice.gov.uk/policy-store/personal-well-being/>

The questions

Question stem	Response options
Overall, how satisfied are you with your life nowadays?	0 to 10
Overall, to what extent do you feel that the things you do in your life are worthwhile?	0 to 10
Overall, how happy did you feel yesterday?	0 to 10
On a scale where 0 is "not at all anxious" and 10 is "completely anxious", overall, how anxious did you feel yesterday?	0 to 10

Appendix 4

Warwick-Edinburgh Mental Wellbeing Scale (WEMWBS)

Available at https://measure.whatworkswellbeing.org/measures-bank/wemwbs/?_ga=2.114746439.1186707352.1685718146-504314868.1685550041&_gl=1*22k9m8*_ga*NTA0MzE0ODY4LjE2ODU1NTAwNDE.*_ga_EBP2CK812P*MTY4NTcxODE0NS4zLjEuMTY4NTcxODIxMi4wLjAuMA..

Statements

- I've been feeling optimistic about the future
- I've been feeling useful
- I've been feeling relaxed
- I've been feeling interested in other people
- I've had energy to spare
- I've been dealing with problems well
- I've been thinking clearly
- I've been feeling good about myself
- I've been feeling close to other people
- I've been feeling confident
- I've been able to make up my own mind about things
- I've been feeling loved
- I've been interested in new things
- I've been feeling cheerful

Scale

- 1 None of the time
- 2 Rarely
- 3 Some of the time
- 4 Often
- 5 All of the time

Appendix 5

UK Scales to Measure Young People's Wellbeing (UNICEF, 2020)

Happiness, Life Satisfaction, Individual Factors, Overall Associations, Overall Wellbeing, Environmental Experiences, Stability and Change, Bullying, Family Relationships, Mental Wellbeing, Positive Emotional State, Positive Outlook, Social Desirability, Interpersonal Competence, Negative Emotions

Appendix 6

PERMA

The Workplace PERMA Profiler is an adaptation of Seligman's (2011) PERMA model and includes items that capture the five pillars of a 'flourishing' life in a work setting: • positive emotion • engagement • relationships • meaning • accomplishment. Vitality has been added.



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Appendix 7

5 Ways to Wellbeing (Aked et al., New Economics Foundation, 2008)

Connect: Connecting with others can help us feel close to people, and valued for who we are. Being social means different things for different people – you might prefer being in quieter situations with one other person, or you might like being in big groups. You might like to connect with people online, or you might enjoy phone calls or sending letters.

Be Active Many people find that physical activity helps them maintain positive mental health.

Take Notice Reminding yourself to take notice can help you to be aware of how you're feeling. It can help you understand what triggers your feelings of stress or anxiety.

Keep Learning We're always learning new things – often without realising it. Feeling like you're learning and developing can boost your self-esteem. And sometimes, setting goals can help you to feel more productive and more in control of your life.

Give There's been lots of research about the effects of taking part in social and community life. Some studies have shown that people who help others are more likely to rate themselves as happy. Is there anything you can do today, to be kind or helpful to someone else?

Appendix 8

Winchester Wellbeing Scale (Gennings, 2021)

The following categories make up a scale to measure young people's wellbeing. Please rate how well each statement relates to the categories definition by placing an x in the relevant box.

- 1 = completely irrelevant
- 4 = extremely relevant

Happiness: Perceptions of momentary pleasure

Characteristics: A momentary attainment of pleasure for pleasures sake

Over the past month I...	1	2	3	4
1. Felt happy				
2. Felt unhappy				
3. Recognised moments that made me happy				
4. Did things that made me happy				
5. Did things that made me feel good				
6. Found enjoyment in things				
7. Did something that made me unhappy				

Judgement: Perceptions of being viewed negatively by others

Characteristics: Being unaccepted by peers and feeling uncomfortable within self

Over the past month I...	1	2	3	4
1. Felt accepted by others				
2. Felt like I could be me				
3. Felt like I belonged				
4. Felt judged by others				
5. Remember thinking people didn't like me				
6. Remember acting differently to fit in				
7. Was able to be myself				

8. Could be myself around others				
9. Was confident in being myself around others				
10. Tried to get people to like me				
11. Was accepted by others for being me				
12. Was worried about what other people thought of me				
13. Was hurt by what people said about me				
14. Took peoples comments personally				
15. Kept thinking about what others said about me				

Friends: Perceptions of feeling connected to others

Characteristics: A fundamental need to have connections with others which improves overall mood and provides a distraction

Over the past month I...	1	2	3	4
1. Felt like part of a group				
2. Felt like I could trust others				
3. Felt lonely				
4. Felt reluctant to talk to others				
5. Felt reluctant to reach out to others				
6. Remember feeling connected to others				
7. Found the time to talk to friends				
8. Spent time with friends				
9. Talked to other people about my problems				
10. Had my mood lifted by others				
11. Had others make me feel good about myself				
12. Had support when I needed it				
13. Did not enjoy spending time with others				

Family Impact: Perception of comfort afforded by parents, carers and home environment

Characteristics: Having parents present and providing comforting safe environment

Over the past month I...	1	2	3	4
1. Felt comfortable at home				
2. Felt supported by my family				
3. Felt encouraged by my family				
4. Felt safe at home				
5. Felt my family were there for me when I needed them				
6. Felt like my family listened to me				
7. Felt left out of family events				
8. Felt uncomfortable around my family				
9. Remember when my family comforted me				
10. Remember when my family supported me				
11. Got on with my family				
12. Argued with my family				

Determination: Perceptions of drive to achieve personal goals

Characteristics: A motivating behaviour causing the want to achieve which firms' purpose

Over the past month I...	1	2	3	4
1. Felt determined to achieve a goal				
2. Remember giving up on a goal				
3. Put in effort towards a task				
4. Invested my efforts in something worthwhile				
5. Kept going when things got tough				
6. Kept going when things were too hard				
7. Gave up when things got difficult				

Health: Perceptions of feeling well with one's mental and physical self.

Characteristics: Feeling both mentally and physically well within one's self

Over the past month I...	1	2	3	4
1. Felt well within myself				
2. Felt physically fit				
3. Felt well rested				
4. Felt positive about myself				
5. Felt physically able to complete tasks				
6. Felt comfortable with how much physical activity I do				
7. Felt stressed				
8. Remember feeling physically healthy				
9. Remember feeling mentally well				
10. Had a positive attitude				
11. Had lots of energy				
12. Had a lack of energy				

Flourishing: Perception of accomplishment from achieving goals

Characteristics: Achieving what one hopes to achieve in life and helping in society

Over the past month I...	1	2	3	4
1. Felt good about what I've done				
2. Felt successful				
3. Felt bad about what I achieved				
4. Recognised my achievements				
5. Recognised when I was successful				
6. Remember celebrating my achievements				
7. Overcame personal challenges				
8. Have achieved a personal goal				
9. Have had a feeling of accomplishment				
10. Achieved what I set out to do				
11. Stayed on top of things				

12. Had my efforts rewarded				
13. Identified when I was successful				
14. Celebrated my achievements				

Appendix 9

Cummins et al (2011)

Enhancing the Quality of life of people with intellectual disabilities

Do you feel excited about what is happening next?

Are you doing fun things today?

Can you choose things yourself today?

Do you feel helpful today?

Have you got on well at school/work today?

Do you like to be with other people today?

Do you feel sad today?

Do you feel relaxed today?

Use of visual imagery and pictorial communication symbols to support interpretation and meaning of items: Have you felt sad?



I've been     Do you feel sad today? feeling relaxed     Do you feel relaxed today?

Response format: Replacing 5-point Likert with either dichotomous or 3-point Likert response

options: Five-point: never – seldom – quite often – very often – always

Dichotomous: yes – no

Three-point: yes – no - sometimes

Five-point: none of the time – rarely – some of the time – often – all of the time

Dichotomous: yes – no

Three-point: yes – no – sometimes

Part II: Personal Wellbeing Index – Intellectual Disability “How happy do you feel about...?” 1. the things you have? Like the money you have and the things you own? 2. how healthy you are? 3. the things you make or the things you learn? 4. getting on with the people you know? 5. how safe you feel? 6. doing things outside your home? 7. how things will be later on in your life?

Appendix 10 3 test Behavioural Assessment

3-test behavioural assessment a free resource:

<https://www.businessballs.com/threetestbehaviourassessmentexample.pdf>

To assess behavioural ability before and after training; own ability perceptions; and ability change.

Using the behavioural points below first assess yourself before training (A). After the training course or programme, assess your new trained ability (B), and revise your pre-trained ability assessment (C). For each question, score yourself out of ten: 0 = lowest and 10 = highest. Assess yourself in relation to your current work group. The spreadsheet version will calculate your scores automatically, or you can print and use a hard copy to calculate your scores manually. The C to B movement best indicates the change after training. You can add other behavioural abilities as necessary, dependent on the training purposes and your own aims. More information, guidance and free people-development systems are at www.businessballs.com.

Assessment interpretation: Scores are subjective - some people score themselves relatively high and some low, so comparisons between people are not absolutely reliable - this assessment is a guide and not absolute. The important column is the final column - the C to B movement, which is the improvement from the revised or validated pre-trained ability to the post-trained ability. Movement from A to C could be for different reasons - it reflects a person's new informed view of how they used to be - discussion can be useful. In this example there is a good improvement after training (B) against the initial pre-training assessment (A), and more importantly a stronger improvement when compared to the validated pre-trained ability (C to B). If there is little difference between A, B and C scores it is important to investigate why the person appears not to have altered their view of themselves nor derived any apparent learning benefit from the training pre-trained ability - assess before training post-trained ability - assess after training change compared with initial pre-trained ability (A) change compared with revised pre-trained ability (C)

Behavioural ability	A	B	C	A to B	C to B
1 Being aware of my own behaviour					
2 Being aware of the behaviour of others					
3 Being aware of the reactions of others to my behaviour					
4 Being aware of my reaction to the behaviour of					

others					
5 Being aware of how much I talk					
6 Being brief and concise					
7 Being aware of how much I support others					
8 Always explaining my disagreements					
9 Being aware of how much I build on the ideas of others					
10 Sensing the feelings of others					
11 Being aware of how much I interrupt others					
12 Being aware of how much I really listen to others					
13 Telling others what my feelings are					
14 Being aware of what behaviour modification I need to do					
15 Knowing how to modify					

my behaviour					
16 Being aware of how much I bring out the views of others					
17 Being positive					
18 The general level of my interpersonal skills					

Appendix 11

Kirkpatrick's Four Levels of Impact Model

Kirkpatrick's Four Levels Model for evaluating impact

<https://www.businessballs.com/training-assessment-and-quality-assurance/kirkpatrick-evaluation-method/>

Evaluation level and type	Evaluation description and characteristics	Examples of evaluation tools and methods	Relevance and practicability
1. Reaction	<p>Reaction evaluation is how the delegates felt, and their personal reactions to the training or learning experience, for example:</p> <p>Did the trainees like and enjoy the training?</p> <p>Did they consider the training relevant?</p> <p>Was it a good use of their time?</p> <p>Did they like the venue, the style, timing, domestics, etc?</p> <p>Level of participation.</p> <p>Ease and comfort of experience.</p> <p>Level of effort required to make the most of the learning.</p> <p>Perceived practicability and potential for applying the learning.</p>	<p>Typically 'happy sheets'.</p> <p>Feedback forms based on subjective personal reaction to the training experience.</p> <p>Verbal reaction which can be noted and analysed.</p> <p>Post-training surveys or questionnaires.</p> <p>Online evaluation or grading by delegates.</p> <p>Subsequent verbal or written reports given by delegates to managers back at their jobs.</p>	<p>Can be done immediately the training ends.</p> <p>Very easy to obtain reaction feedback</p> <p>Feedback is not expensive to gather or to analyse for groups.</p> <p>Important to know that people were not upset or disappointed.</p> <p>Important that people give a positive impression when relating their experience to others who might be deciding whether to experience same.</p>
2. Learning	<p>Learning evaluation is the measurement of the increase in knowledge or intellectual capability from before to after the learning experience:</p> <p>Did the trainees learn what was intended to be taught?</p> <p>Did the trainee experience what was intended for them to experience?</p> <p>What is the extent of advancement or change in the trainees after the training, in the direction or area that was intended?</p>	<p>Typically assessments or tests before and after the training.</p> <p>Interview or observation can be used before and after although this is time-consuming and can be inconsistent.</p> <p>Methods of assessment need to be closely related to the aims of the learning.</p> <p>Measurement and analysis is possible and easy on a group scale.</p>	<p>Relatively simple to set up, but more investment and thought required than reaction evaluation.</p> <p>Highly relevant and clear-cut for certain training such as quantifiable or technical skills.</p> <p>Less easy for more complex learning such as attitudinal development, which is famously difficult to assess.</p> <p>Cost escalates if systems are poorly designed, which increases work required to measure and analyse.</p>

		<p>Reliable, clear scoring and measurements need to be established, so as to limit the risk of inconsistent assessment.</p> <p>Hard-copy, electronic, online or interview style assessments are all possible.</p>	
<p>3. Behaviour</p>	<p>Behaviour evaluation is the extent to which the trainees applied the learning and changed their behaviour, and this can be immediately and several months after the training, depending on the situation:</p> <p>Did the trainees put their learning into effect when back on the job?</p> <p>Were the relevant skills and knowledge used</p> <p>Was there noticeable and measurable change in the activity and performance of the trainees when back in their roles?</p> <p>Was the change in behaviour and new level of knowledge sustained?</p> <p>Would the trainee be able to transfer their learning to another person?</p> <p>Is the trainee aware of their change in behaviour, knowledge, skill level?</p>	<p>Observation and interview over time are required to assess change, relevance of change, and sustainability of change.</p> <p>Arbitrary snapshot assessments are not reliable because people change in different ways at different times.</p> <p>Assessments need to be subtle and ongoing, and then transferred to a suitable analysis tool.</p> <p>Assessments need to be designed to reduce subjective judgement of the observer or interviewer, which is a variable factor that can affect reliability and consistency of measurements.</p> <p>The opinion of the trainee, which is a relevant indicator, is also subjective and unreliable, and so needs to be measured in a consistent defined way.</p> <p>360-degree feedback is useful method and need not be used before training, because respondents can make a judgement as to change after training, and this can be analysed for groups of respondents and trainees.</p> <p>Assessments can be designed around relevant performance scenarios, and</p>	<p>Measurement of behaviour change is less easy to quantify and interpret than reaction and learning evaluation.</p> <p>Simple quick response systems unlikely to be adequate.</p> <p>Cooperation and skill of observers, typically line-managers, are important factors, and difficult to control.</p> <p>Management and analysis of ongoing subtle assessments are difficult, and virtually impossible without a well-designed system from the beginning.</p> <p>Evaluation of implementation and application is an extremely important assessment - there is little point in a good reaction and good increase in capability if nothing changes back in the job, therefore evaluation in this area is vital, albeit challenging.</p> <p>Behaviour change evaluation is possible given good support and involvement from line managers or trainees, so it is helpful to involve them from the start, and to identify benefits for them, which links to the level 4 evaluation below.</p>

		<p>specific key performance indicators or criteria.</p> <p>Online and electronic assessments are more difficult to incorporate - assessments tend to be more successful when integrated within existing management and coaching protocols.</p> <p>Self-assessment can be useful, using carefully designed criteria and measurements.</p>	
4. Results	<p>Results evaluation is the effect on the business or environment resulting from the improved performance of the trainee - it is the acid test.</p> <p>Measures would typically be business or organisational key performance indicators, such as:</p> <p>Volumes, values, percentages, timescales, return on investment, and other quantifiable aspects of organisational performance, for instance; numbers of complaints, staff turnover, attrition, failures, wastage, non-compliance, quality ratings, achievement of standards and accreditations, growth, retention, etc.</p>	<p>It is possible that many of these measures are already in place via normal management systems and reporting.</p> <p>The challenge is to identify which and how relate to the trainee's input and influence.</p> <p>Therefore it is important to identify and agree accountability and relevance with the trainee at the start of the training, so they understand what is to be measured.</p> <p>This process overlays normal good management practice - it simply needs linking to the training input.</p> <p>Failure to link to training input type and timing will greatly reduce the ease by which results can be attributed to the training.</p> <p>For senior people particularly, annual appraisals and ongoing agreement of key business objectives are integral to measuring business results derived from training.</p>	<p>Individually, results evaluation is not particularly difficult; across an entire organisation it becomes very much more challenging, not least because of the reliance on line-management, and the frequency and scale of changing structures, responsibilities and roles, which complicates the process of attributing clear accountability.</p> <p>Also, external factors greatly affect organisational and business performance, which cloud the true cause of good or poor results.</p>

Appendix 12

Evaluation of training and learning (Rae, 2004)

This document contains the essential end-of-programme validation, feedback and follow-up instruments: most ready for use, others for you to develop to suit your own situation.

Instruments such as the ones included here are the most effective way of:

- a) determining what the participants have learned
- b) giving the learners time to reflect on their learning during the programme prior to their completion of their post-training personal action plan
- c) getting useful feedback in an organized manner, to help with future training planning, and
- d) ensuring trainees and learners follow-up their training with relevant actions to apply, improve, develop and reinforce learning attained.

The document contains two alternative learning evaluation instruments; two suggested approaches to post-training personal action planning, and four types of 'reactionnaire' for post-training feedback.

Tools included:

- Evaluation of Learning Questionnaire (LQ) - ready to use
- Evaluation of Key Objectives Learning Questionnaire (KOLQ) - guide
- Action Plan template and instruction - ready to use
- Four separate and different 'Reactionnaires' - to suit different situations

About 'reactionnaires'

It is often valuable to obtain the reactions of training participants to matters outside the evaluation of the learning itself, eg., domestic arrangements, style and pace of training delivery, training administration, etc.

By using a well-constructed and effective 'reactionnaire' (not a tame 'happy sheet', skewed to prompt favourable comments) useful data can be obtained to help plan future training.

It is not necessary to have this type of feedback completed after every course or programme.

Use 'reactionnaires' for the first two or three times that a new programme or course is run, to enable fine tuning and to identify problem areas.

Example 1. Evaluation of learning questionnaire (LQ)

Please consider the learning programme that you have attended and complete the following. Be completely honest in your assessments and answer the questions as fully as possible, continuing on a separate sheet if necessary. You will find your reflections helpful in the completion of your Action Plan.

LQ Part I - Learning

To what extent do you feel you have learned from the programme? (Please ring the score number that you feel most closely represents your views)

Learned a lot 6 5 4 3 2 1 Learned nothing

If you have rated 6, 5 or 4 please describe a) what you have learned and b) what you intend to do with this learning on your return to work.

If you have rated 3, 2 or 1, please state as fully as possible the reasons why you gave this rating.

LQ Part II - Confirmation of Learning

To what extent do you feel you have had previous learning (perhaps some you have forgotten) confirmed?

Confirmed a lot 6 5 4 3 2 1 Confirmed little

If you have rated 6, 5 or 4, please describe a) what has been confirmed and b) what you intend to do with this learning on your return to work.

If you have rated 3, 2 or 1, please state as fully as possible the reasons why you gave this rating.

LQ Part III - Non-learning

What have you NOT learned that you needed to and /or expected to learn during the programme? Please describe fully any items.

LQ Part IV - Any other comments

Example 2. Evaluation of key objectives learning questionnaire (KOLQ)

This instrument is a more specific alternative to the LQ where you want to determine the learning of the particular content and objectives of the programme. You should identify from the training programme planning activity what are the main objectives of the programme (which, of course, every programme should have). These can be converted into a format of questions seeking information on the extent to which the learners feel that they have learned

in each key objective area. While being more specifically related to the learning, this method obviously takes greater effort in preparation since a different KOLQ will have to be produced for each different programme.

Part of a KOLQ for, for example, an interpersonal skills programme might be:

1. To what extent have you learned on the course about your behavioural skills?

A lot 6 5 4 3 2 1 Nothing

If you scored in the range 3 to 1, please comment why you have given this rating.

2. To what extent have you learned on the course about how much you contribute to group discussions?

A lot 6 5 4 3 2 1 Nothing

If you scored in the range 3 to 1, please comment why you have given this rating.

3. To what extent have you learned on the course about non-verbal communication?

A lot 6 5 4 3 2 1 Nothing

If you scored in the range 3 to 1, please comment why you have given this rating.

and so on.

Example 3. Action Plan

Action plan - template and instruction

The action plan format

It is essential that at the end of every learning event, all learners should complete an action plan based on what has been learned or has been reminded. When learning is applied when the trainee returns to work, the new skills and knowledge develop, reinforce their new abilities, and the organization benefits from improved performance. Learning without meaningful follow-up and application is largely forgotten and wasted.

Learners should be guided to produce action plans that:

- are simple and straightforward
- are clear and unambiguous
- contain items that can be implemented by the learner at work, with or without support
- or any resources that might be available
- contain comments on the methods to be used; the resource required and the timings:

start, finish times or dates, for all the action items (use 'SMART' - Specific, Measurable, Agreed, Realistic, Time-bound)

Finally, action plans should be achievable in the context of work demands. Action plans should not contain more items than the learner can handle without undue delay or creating problems at work. If the action list appears to be too complex or long, items should be scheduled for progressive introduction, when prior items have been completed.

Personal action plan

Action plan item how to implement when

- 1.
- 2.
- 3.
- 4.
- 5.
- 6.

(Continue on a separate sheet if necessary)

Action plan implementation aid

Complete this sheet for each item included on the action plan:

1. What is the item of learning you intend to implement?
2. By which targets will you measure progress?
3. What barriers might impede your implementation?
4. How will you avoid or negate these barriers?
5. Time: when do you intend to start implementing the item?
6. Time: by when do you intend to complete the implementation of the item?
7. Resources: what resources (people, equipment, extra skills, etc.) will you need to complete the implementation of the item?
8. Benefits: what benefits do you hope will result from your actions (including financials if possible to assess)?
9. Commitment: when will you and your manager meet a) to discuss the implementation of your plan and b) to review the progress of this action?
10. Any other comments (continue on a separate sheet if necessary):

Example 4. Reactionnaire 1 (general)

Where scoring number ranges are given, circle the number that you feel most closely represents your views.

1. To what extent do you feel your personal learning objectives have been achieved?

Fully 6 5 4 3 2 1 Not at all

2. Which of your personal objectives were not achieved, and why?

3. Which parts of the event do you feel will be most useful back at work?

4. Which parts of the event do you feel will be least useful, or not at all useful back at work?

5. Are there any subjects you would have liked to be included?

6. To make way for any additional material what would you omit?

7. How would you rate the programme overall

Very useful 6 5 4 3 2 1 Little use

Very interesting 6 5 4 3 2 1 Of little interest

Please state fully why you have given the above ratings.

Example 5. Reactionnaire 3 (general)

Comments are required as well as scores please.

For every item place an 'X' in the scoring box that most closely represents how you feel about the programme. Also, please comment briefly on each item about your reasons for giving this score, particularly if your ratings are 3, 2 or 1.

6 5 4 3 2 1

Stimulating -----Boring

Please comment briefly why you have given this rating

Useful for my work -----Useless

Please comment briefly why you have given this rating

Relevant to my work ----- Irrelevant

Please comment briefly why you have given this rating

Good discussions -----Limited discussions

Please comment briefly why you have given this rating

Flexible structure ----- Rigid structure

Please comment briefly why you have given this rating

Well conducted ----- Poorly conducted

Please comment briefly why you have given this rating

Demanding ----- Undemanding

Please comment briefly why you have given this rating

Challenging ----- Patronizing

Please comment briefly why you have given this rating

Well spaced out ----- Too condensed

Please comment briefly why you have given this rating

Good use of time ----- Poor use of time

Please comment briefly why you have given this rating

Good level of activity ----- Poor level of activity

Please comment briefly why you have given this rating

My objectives achieved -----My objectives not achieved

Please comment briefly why you have given this rating

I would recommend the programme to my colleagues Yes / No

Any other comments:

Example 6: Programme Content

1. What did you like best about the programme?
2. What did you like least about the programme?
3. What did you learn from the programme?
4. What did you not learn from the programme that you were expecting to learn?
5. What do you think should be added to the programme?
6. What do you think should be dropped from the programme?
7. To what extent did the programme duplicate what you had learned previously

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