

Evaluation Planning Toolkit

What is evaluation?

Evaluation is a way to help you understand and show others whether your work has met or exceeded your expectations. Good project and evaluation planning should be linked to the core values and vision of your organisation.

Planning your evaluation

Evaluation planning should be built in at the beginning of your project planning. If you are clear about what the project aims and objectives are then you can plan evaluation at the same time. It is worth spending some time deciding why you are going to evaluate your project and what you are going to do with the information gained from your evaluation.

Some funders will have set formats for evaluation and you will need to collect specific information for them. It's worth considering whether this will provide you and your organisation with all the information you need and you may choose to collect additional information.

Stages of evaluation

There are different stages and types of evaluation

Baseline evaluation will help you to understand your starting point. If your project is to change people's feelings or thoughts about a topic then you need to understand their starting point. Similarly if you want to show that your visitor patterns have changed as a result of a new exhibition you need to be able to demonstrate your visitor base before the exhibition.

Front end evaluation helps you to check that your plans will meet the intended audience needs. This can be very important when putting in funding bids as many funders need to see that you are responding to your audiences' needs. You may want to use a focus group to ask what stories they are interested in learning about based on your museum collection or use volunteers to interview visitors.

Formative evaluation keeps an eye on what you are developing and checks it continues to meet audience needs. It will help you to improve the design of your project. This takes place when you have something concrete to show such as interactive prototypes or drafts of text. Focus groups or visitor interviews can be very helpful here.

Summative evaluation happens at the end of a project or when the 'total package' is ready. You might want to interview visitors to gauge their understanding of a display or ask them to fill out a questionnaire which measures their enjoyment of a project.

Longitudinal evaluation takes place several months after the end of a project to show whether it has any longer term impacts. You may want to repeat a questionnaire designed to judge the understanding and enjoyment of an element of a project or exhibition.

Triangulation There is always a risk with evaluation that people may tell you what they think you'd like to hear. If you triangulate by using more than one technique or type of evaluation you can confirm that the results are all telling you the same story.

Types of data

There are two main types of data used in evaluation; qualitative and quantitative. Both have advantages and disadvantages and it is important to understand the limitations of each sort.



Qualitative data is typically descriptive. The data can be observed but not measured in a statistically meaningful way. The information collected could include peoples' feelings in response to a work of art, their thoughts on a museum display, how much they enjoyed an activity and how taking part in a project made them feel.

Quantitative data can be counted or measured. It may include examples such as 45% of visitors travelled for less than 30 miles to visit the museum, or 56% of groups contained young people under the age of 16.

Both types of data can be used for any size of project and most evaluations will combine the two. Do be wary of using percentages as a default way of displaying results if your sample size is small (less than 100). It is often better to be clear about the numbers involved and use statements such as:

'17 of the 30 participants reported that they had revisited the museum as a result of taking part in the project'

rather than the numerically correct but slightly misleading statement that:

'56% of participants reported that they had revisited the museum as a result of taking part in the project'

Collecting and analysing data

How many people will you ask and who will you talk to?

Qualitative data usually comes from a small number of in depth interactions with selected people or groups of people. Consider the resources you have available to support you in collecting this data. Face to face interactions are probably the most effective way to get good qualitative information such as focus groups or more in depth interviews. Open questions will enable you to elicit more detail from your interviewees. An open question will give your audience space to think and reflect on their experience.

Quantitative data usually represents a larger proportion of your audience (typically 10-20%) and will be less in depth. Quantitative information can be collected via self completed questionnaires either on paper or increasingly, using a programme such as Survey Monkey. (One quick cautionary note- programmes like Survey Monkey will provide very nice looking graphs of responses and it can be tempting to simply copy these over but do be aware of the risk of overusing percentages described above- be sure what the results are telling you). Closed questions may be more helpful if you want to present quantitative data. Closed questions will limit the answers you can collect, are easier and quicker to answer and are easy to quantify. Where possible include a scale:

Q Was it easy to find your way around the museum?

Not at all OK very easy

You can easily adapt the idea of a scale to include younger visitors

Q was your visit today fun? Colour in the right face



What evidence do you want?

To help clarify your evaluation plan it is considering how the evaluation is to be used.

To report to a project funder to report to trustees/board/CEO

Many funders and boards will want to see value for money and understand the reach and impact of your project. Be clear at the outset what they will want to know. You will almost certainly need to collect some quantitative data relating to your audience (numbers reached, age, gender, ethnicity for example) and some qualitative data showing the impact your project had on this audience. How will you show impact? Make sure that you establish a good baseline so you can clearly demonstrate this.

To help you to improve future projects

Do you want to reach more people or improve the experience of your existing audience? Do you want to streamline the project management or improve training for volunteers taking part? Again, being clear about your aspirations will help you to focus on the type of evidence you need.

To understand the impact of the project on participants

Qualitative data is key to understanding impact on participant. Consider whether you plan, for example, that they will have improved skills or confidence as a result of taking part. How will you show this?

To check and ensure the quality of your offer

Are visitors happy with their experience? Self completed surveys or exit interviews using a set of closed questions which can be placed on a scale can provide a good insight. You may also want to collect more subjective information from visitors or participants to check their understanding. By setting learning outcomes linked to a project you can design interview questions to check on this learning outcome.

Observation by accompanying visitors throughout a visit can help with monitoring and may reveal some unexpected points such as the route people choose to take through your galleries or how long is spent on different activities.

To help with future marketing or advocacy of your offer

Collecting testimony from visitors or project participants is very helpful for marketing and advocacy. Ensure that people know their words or images will be used and collect permission from parents or carers for children and young people. (Sample form attached).

Evaluation ideas**Desk based research**

By establishing the social and economic context in which your museum is placed and comparing that to current visitor patterns it is possible to understand the current reach of your organisation. This will help you to set aims for engagement. The CASE programme builds on the 'Taking Part' survey and provides access to a range of data which can help with profiling.

<https://www.gov.uk/case-programme>

Combine this with some exit surveys to gauge the composition of your audience and you will be able to see who in the local population is not using your service.

Surveys and exit interviewsPostcards/response cards

Have a set of postcards with five key questions and ask people to fill them in before leaving. Put a postbox by the exit to collect these- if they leave your museum you are very unlikely to get them returned. Have space for visitors to leave contact details if they are willing to be contacted for more in depth feedback. Allow space for phone numbers and email addresses and be very clear that you will not pass these details on to any other organisation.



A combination of closed questions with space for a longer answer for one open question will give you some useful information. Following up a proportion via phone or email will help you delve deeper with a small number of visitors.

Pros: Cost effective

Allows for a combination of quantitative and qualitative information

Cons: May be self selecting (people may use them to complain)

Return rates can be low as people have already decided to leave the museum and are focused on their next activity

Good for: Monitoring satisfaction with specific things

Collecting quantitative data to demonstrate the need for change

Exit surveys

Have staff or volunteers trained to interview selected (maybe 10%) groups as they leave. Again a combination of closed questions which are quick and easy to answer with one or two more in-depth open questions will give you some useful insights. It may be worth inviting groups to join you for drinks and biscuits as an incentive and to encourage families to take part.

Pros: Can give good insight and allows for specific areas to be followed up

Cons: Labour intensive and relies on well trained staff or volunteers

Good for: Monitoring satisfaction with specific things

Collecting quantitative data to demonstrate the need for change

Providing quotes to back up a case for change

Online surveys

These are easy to set up and send round but be aware that response rates can be very low. Online surveys also discriminate against those who have limited access to the internet. They can work well for a very targeted group such as teachers but it may be worth considering an incentive such as entry into a draw for a prize. Closed questions work best for this sort of remote survey although you may be able to capture some detail in free text boxes.

Pros: Cost effective

Provide collated results

Good quantitative results

Cons: Poor return rates

Limited scope for qualitative questions

Good for: Getting information from a targeted group

Telephone surveys

Telephone surveys are much more labour intensive than online surveys but more likely to get a result. They are most effective when you already have a relationship with people you are calling such as visitors who have filled in a postcard and agreed to being contacted, or teachers who have bought school visits to you.



It is good practice to have a short initial contact via email or phone to introduce yourself and what you are hoping to do. Be very clear about

- Why you want to talk to them
- What will happen to their replies
- How long the interview will take

and agree a convenient time for you to call them back.

Pros: You can explore questions in depth

Cons: Can be time and resource heavy

Good for: Understanding the experience of visitors or participants in detail

Making a case to funders by evidencing need

Activities in the museum or as part of project activity

Designing activities as part of a visit or project which can give you valuable evaluation information can be very effective.

Stickers and post it notes

(NB, be very clear about where the stickers are to be used and make sure everyone understands this- is there any risk to objects?)

Provide the children in a group with smiley, sad and neutral face stickers and encourage them to use them in response to questions by sticking them onto a card they take round with them. Be sure to give each child a smiley face sticker to keep when they hand the card in.

Provide people with cards with a list of displays/objects/galleries and ask them to put a star sticker next to their three favourites

Provide post it notes and encourage visitors to choose their favourite object and leave a few words next to it explaining why.

Pros: Involves all members of a group

Collating results allows you to understand areas of the museum that are particularly popular

Cons: The results may be too spread out throughout the museum to be significant

Good for: Understanding visitor preferences

Explaining what engages people to help steer future plans

Advocacy

Graffiti walls

Have large pieces of paper on the wall and encourage people to write their thoughts down anonymously. This can be very useful as part of a project activity. You could have a series of prompts to help people get started as a blank piece of paper can sometimes be intimidating. Be prepared to check on these regularly and have a plan for what to do if someone writes something offensive or obscene- however, do have the courage to leave polite criticism there for all to see. You may find others countering the criticism for you or adding to it and this will give you valuable information.



Pros: Cost effective

Inclusive

Cons: Senior management may be wary of public criticism

Good for: Understanding visitor preferences

Explaining what engages people to help steer future plans

Advocacy

Video diary rooms

This can appeal; to young people or to those who don't want to do a lot of writing to fill out surveys. You will need to be very clear about how you plan to use the footage and to get permission if you plan to show it. Set up a room or area with a video camera set up on a tripod and leave clear instruction about turning on and recording and leave a short list of questions for participants to answer. If possible have a member of staff or volunteer nearby to help if needed but in general leave participants to themselves. A few well chosen open questions can give good insight.

If you are running a more structured event or project you could provide families or school groups with video cameras and ask them to interview each other using suggested cues.

Pros: Can encourage responses from those who don't usually 'bother'

Cons: Resource heavy

Good for: Advocacy

Photography

Provide digital cameras and ask visitors or project participants to select a small number of objects to photograph. Download these and ask them to say or write down a few words explaining their choice.

Pros: Good insight

Cons: Can be resource heavy

Good for: Finding out what interests people and why

Advocacy

Observation

If you want to understand in detail how people are accessing your museum then accompanying groups around can give you insight into routes taken, length of time in different areas, elements and activities that engage and those that don't and ease of access for different groups.

Decide which group of visitor you would like to observe and ask for permission to accompany them around. Explain that you are researching how visitors enjoy the museum and be very clear about what you will be doing with your observation. Be prepared for quite a lot of people to say no- they may feel uncomfortable being 'watched'. Once you do have permission you need to try and fade into the background. There may be a tendency for the group to ask your advice and don't be obstructive but steer them towards the publicly available sources of information (let's check out the leaflet, let's ask the room steward). Be aware that your presence may affect their behaviour (reluctance to go to the café as early as they would want to for example). Thank the group at the end and if they have time have a chat with them to clarify which parts of the visit they enjoyed and any elements they didn't.



Another form of observation is to use the experience of room stewards and volunteers. Allocate one 'behaviour' to each staff member or volunteer and ask them to observe it for a set period. For example, observe how many children use an interactive, how long they spend using it and the rough age range of the children.

Pros: Can be useful to understand visitor behaviour

May show up surprising barriers to access

may show popularity or otherwise of specific elements of the collection

Cons: Resource heavy

May change the behaviour of visitors

Good for: understanding access issues

Understanding the reality of how visitor move through the spaces

(Staff observation) collecting quantitative data showing how well used a new element is

Blogging diaries and scrapbooks

It can be particularly effective to ask project participants to record their time with you by writing, drawing, taking photographs or creative writing. Using social media channels such as Tumblr, Instagram or Pinterest you can encourage people to record a response each time they take part in the projects either by blogging, vlogging or sharing photographs or artwork. (Vlogging is a blog which contains video footage and may be a video diary. Vlogs can be very useful for people who don't like, or struggle with, writing). Alternatively you could give each participant a notebook at the start of the project and ask them to write an entry after each time they take part in the project. You can steer the contributions towards areas you want to evaluate by asking a couple of questions to help frame each response. For example 'How did it make you feel when you found out about the different ages of soldiers volunteering in WWI'?

Be clear at the outset that these diaries will be shared- but not 'marked' or judged in any way – and explain that you need to understand how taking part in a project changes peoples thought and feelings as well as their understanding.

Pros: Can give real insight into the impact of a project

Is a useful way to double check understanding

Cons: Very resource heavy in terms of time

Can be hard to find a way to show the results

Good for: Advocacy

Demonstrating changes in behaviour or attitude

Focus groups

A focus group is a small (usually between 5 and 10) group of people who are invited to come along to a meeting with a specific focus. Membership of the group will depend on your focus and you may want to work with specialist groups to help understand specific issues.

A focus group can be run as a one off or you may want to involve a group with longer term planning and implementation of a project or exhibition. Running a focus group and interpreting the outcomes can be time consuming but can give you clear evidence of the desire for a change in your offer or a project.

You may want to use a trained facilitator to help run the group and interpret the results and they will need a clear briefing to ensure that they understand what you want to know from the group.



Pros Can give real in depth insight

Cons Resource heavy

Good for: Planning

Formative evaluation

Longitudinal evaluation

Examples of Models and frameworks

The Museums Libraries and Archives Council introduced *Inspiring Learning for All* in 2004. This was intended to be a national framework for accessible and inclusive learning and provided a number of tools including measures to help museums, galleries and archives to show evidence of the impact of their activities. Two sets of outcomes were defined: Generic Learning Outcomes and Generic Social Outcomes. This framework is still in use across the sector and funders such as the HLF encourage the use of GLOs and GSOs in the evaluation of projects.

The framework is still available and can be found online

<http://www.inspiringlearningforall.gov.uk/>

Theory of change/Logic models

Theory of change models have been used in social change projects and initiatives since the 1970s. and are a more recent addition to evaluation toolkits for the cultural sector. More often used for complex projects where a lot of different elements need to be considered it can also be adapted for much simpler projects.

The starting point for this type of model is to agree the long term outcome that is desired. The route to this outcome is mapped showing the activities and outputs needed to achieve this aim. This means that evaluation measures are built in from the start and that outcomes and outputs are realistic and understood.

A logic model looks at:

Purpose/mission- why are you doing this project? What is the problem or opportunity driving this?

Inputs - who will be involved (staff, volunteers, partners) funding, materials, venues

Activities - what will you do? E.G deliver training, run focus groups,

Outputs - how will you show the results of the activities? How many people were trained? How many attended focus groups and how many were run? Did the theme of an exhibition change as a result of the focus group?

Outcomes – what changed as a result of the project? Increased confidence as a result of training? Different audiences visited as a result of a new theme for an exhibition?

Most significant change/monitoring without indicators

Again this is a model often used to understand social change projects and programmes which is now being adopted by some in the museum sector. The Most Significant Change technique is a tool for collecting, discussing and selecting stories about the significant changes that people experience as a result of your project. There are ten steps involved



- Step 1: Raising interest
- Step 2: Deciding on domains of change
- Step 3: Deciding on the reporting period
- Step 4: Collecting social change stories
- Step 5: Selecting the most significant stories
- Step 6: Feeding back results to key people
- Step 7: Verification of stories
- Step 8: Quantification of stories
- Step 9: Secondary analysis and monitoring
- Step 10: Evaluating and revising the system

More information can be found here

http://betterevaluation.org/resources/guides/most_significant_change

Appendix 1 – [Evaluation Report Template](#)

Appendix 2 – [Photo Permission Form Template](#)

Appendix 3 – [Evaluation Glossary](#)

Appendix 4 – [Useful Websites](#)

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