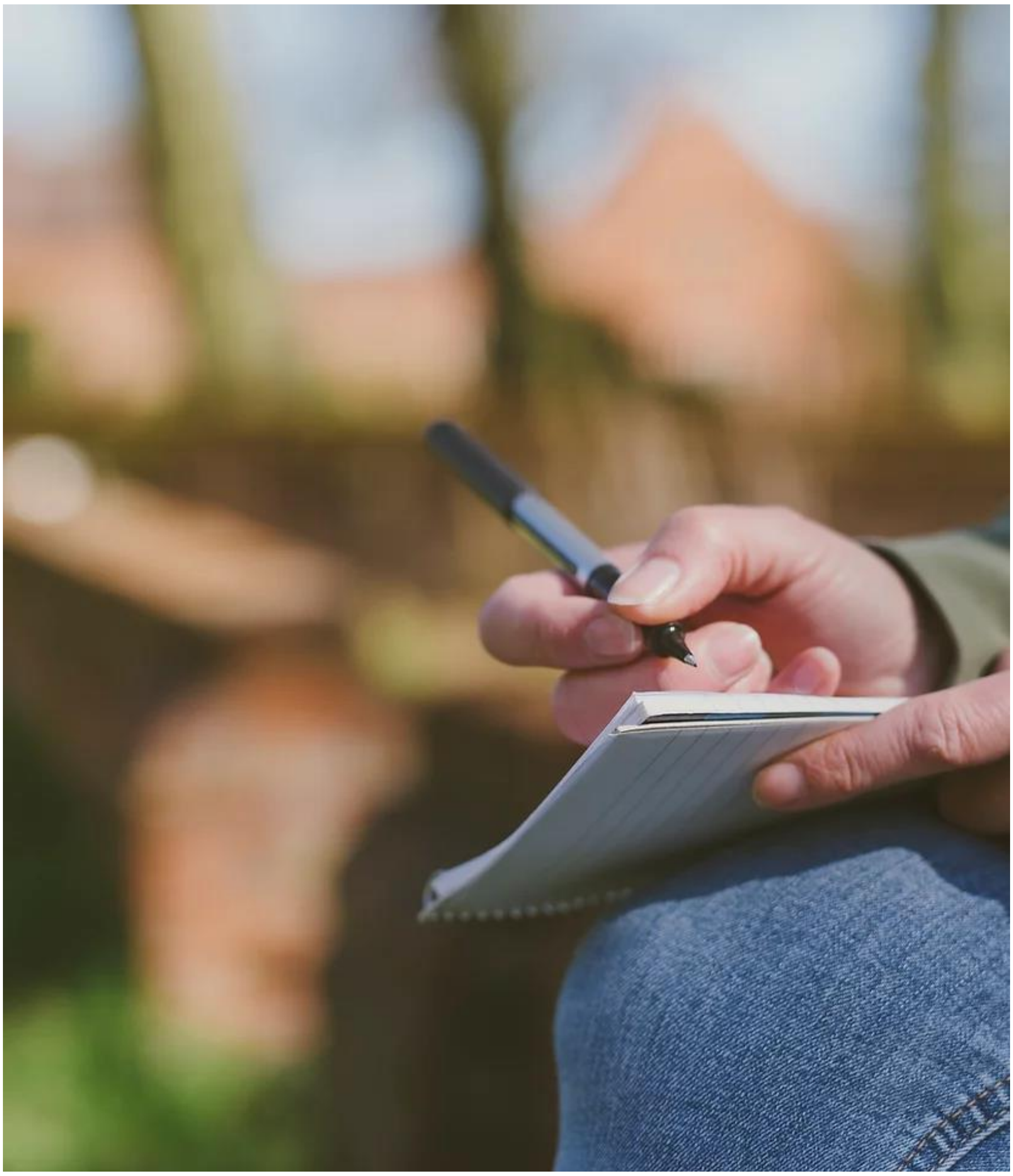
CREATING SUCCESS STORIES



A Simple Evaluation Toolkit and Framework for groups doing NLHF and Similar Projects

This toolkit was created by Sophie Cabot BA MPhil, based on work by Pippa Smith of Handling the Past
www.handlingthepast.co.uk

Contents

Introduction

What is the toolkit for?

This framework and toolkit is primarily designed fulfil the requirements for the evaluation of National Lottery Heritage Fund (NLHF) projects but the principles can be adapted for any project. Accompanying resources contains a question bank which show how different questions can also link to the Generic Social Outcomes and Generic Learning outcomes used by Arts Council England.

The framework used throughout is a logic model which is recommend by the NLHF and which can be adapted for a wide range of project types.

What's in it?

Sections are included on different types and stages of evaluation, types of data and ways of presenting information and a suggested report structure is included. Specific evaluation methods are suggested for different audiences and types of project and templates for the collection of information from participant are provided in the appendices.

The toolkit is designed to be used with accompanying downloadable resources. Spreadsheets are provided to show how volunteer input to a project can be logged and linked to NLHF monetary equivalents, how a range of charts are produced using a hypothetical set of data and an example of how freeform longer responses to surveys can be analysed and visualised.

Finally taking each of the six NLHF principles of good evaluation in turn best practice is described along with pitfalls to avoid.

Introduction to evaluation

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 deciding why you are going to evaluate your project and what you are going to do with the information gained from your evaluation. You may need to report to a funder but with a little planning you can also use evaluation for internal reporting and advocacy.

Types of evaluation
There are different stages and types of evaluation

<u>Baseline Evaluation</u>
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 you have engaged with a wider audience or targeted specific groups then you need an understanding of who is engaging before the project.

Spending some time researching who lives in the area of your project will allow you to compare this with those already engaging with a project, site or amenity and enable you to see who your missing audience is.

Norfolk County Council provides demographic data via Norfolk Insight, which is available to the public. See https://www.norfolkinsight.org.uk/
This provides data on

- Population
  - Including ethnicity
- Economy
- Housing
- Children and young people
- Crime
- Deprivation
- Health
- Environment

Department for Culture Media and Sport (DCMS) ‘Taking Part’ surveys are also available
https://www.gov.uk/guidance/taking-part-survey

The Taking Part survey collects data on engagement with

- arts
- museums and galleries
- archives
- libraries
- heritage
- sport

Unfortunately the reports accessible are limited in scope and are Tableau data visualisations limited to regional data. It is possible to get access to more detailed data from the UK data service but you will need to register to access this https://beta.ukdataservice.ac.uk/datacatalogue/studies

Typically project plans will list groups they aim to target and these groups may be related to

- Age
- Ethnicity
- Gender
- Social class
- Those with disability
- People from a specific area/location

If your project plans to engage with any specific groups then you will need to develop an understanding of how these groups currently engage.

This can be done by
Targeted surveys to be repeated at intervals through the project

- Online
- Face to face

Interviews and questionnaires with volunteers when they start to be compared to exit interviews

Asking survey questions that link to these characteristic can be sensitive and you should be clear why you need to ask this and always allow participants not to answer if they so choose. You can make this a clear decision by asking them to tick a box 'prefer not to say' or encourage people to ignore questions that they don't wish to answer. The former option may allow you to analyse which questions people generally felt uncomfortable with but it may make a survey unwieldy.

Avoid assumptions that questions around gender are binary- the simplest way to do this is avoid tick boxes and simply leave space for people to write whichever gender they identify as.

Ideally any monitoring questions will be anonymous. If you are asking other questions which can identify someone (such as volunteers) then design any survey so that questions on characteristics can be submitted separately without the possibility of identification. If people are filling out paper surveys be sure that the monitoring questions can be separated. If you are undertaking surveys online you may need to consider two different surveys. Always explain why you are asking these questions and only ask them if they are relevant to your project aims.

If you do collect information which identifies people then you must consult with the Data protection Officer to make sure that what you are doing complies with GDPR and is in line with Norfolk County Council's Privacy Policy https://www.norfolk.gov.uk/what-we-do-and-how-we-work/open-data-fois-and-data-protection/data-protection/privacy-notices

The question around employment on the template provided are designed to link to the Office for National Statistics Socio-economic classification (NS-SEC) coding tool https://www.ons.gov.uk/methodology/classificationsandstandards/standardoccupationalclassificationsoc/soc2010/soc2010volume3thenationalstatisticssocioeconomicclassificationnssecrebasedonsoc2010

This is most accurate when used as part of face to face interviews but using the questions suggested on a survey will give you an idea of the socio- economic classification range of your audience.

It is suggested that you limit questions to the simplified method unless there is a real need for detailed information on socio economic classifications- this is a balance between asking more questions and risking people not responding because there are too many and asking fewer questions but getting them all answered.

Examples of a form which can be used to collect demographic data and a' how to' guide for coding socio economic information can be found appendix 1.

Current levels of awareness

Some projects aim to raise awareness of heritage, for example 'the railway heritage of Marriott's Way'. To demonstrate this you need evidence of the pre-existing levels of awareness.

If possible face to face interviews in settings such as a shopping centre, supermarket or high street will give a good sense of this. Asking questions at heritage sites will skew results to those already interested.

Most supermarkets have community champions who may be happy to support you. For a high street contact the City or Town Centre Manager and for shopping centres looks for the centre manager.

Create one or two non-leading questions, for example for a project aimed at increasing knowledge of the role played by Maroni in Chelmsford people were asked 'What would you say Chelmsford is famous for' and shown an historic photograph of a Marconi factory and asked what they thought was made there.

The same questions can be asked online using social media accounts but be clear which are used and show that you understand any bias that may be introduced here. In the example above the Facebook account 'Chelmsford remembered' was much more likely to survey people, with an interest in local history than the group 'Chelmsford Community and chat'. It is also worth noting that Facebook and Twitter tend to be used by older people with Instagram more by younger users. Information on the 'digital divide' looking at groups that may be totally excluded from online surveys can be found on the ONS website
https://www.ons.gov.uk/peoplepopulationandcommunity/householdcharacteristics/homeinternetandsocialmediausage/articles/exploringtheuksdigitaldivide/2019-03-04

Front End Evaluation

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. If you plan to target a particular audience (schools or young people for example) then you may want to use a focus group made up of that audience to mind map areas of your project that interest them.

Formative Evaluation

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

Summative evaluation happens at the end of a project or at prearranged milestones although it should be based on data and information collected throughout the project. You might want to regularly interview visitors to gauge their understanding of a new information panel or ask them to fill out a questionnaire which measures their enjoyment of a new route on a trail.

Longitudinal Evaluation

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 a trail with new information boards for example or look for data on increased use of a path. This can be a tricky area for externally funded projects as, once the project has ended and the funding has finished there is no incentive or money to undertake this. NCC may want to consider adding in some longitudinal evaluation for larger projects.

Triangulation
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.

Data
Types of data
There are two 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 changes to a building, their thoughts on a new information board or leaflet, 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 an attraction, 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 increased their frequency of exercise as a result of improvements to the trail'

rather than the numerically correct but slightly misleading statement that:

'56% of participants reported that they had increased their frequency of exercise as a result of improvements to the trail'

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 a minimum of 10-20%) and will be less in depth. Quantitative information can collected via self-completed questionnaires either on paper or increasingly, using a programme such as Smart Survey. (One quick cautionary note- programmes like Smart Survey 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 the route?

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

<u>Closed and open questions</u>

Closed questions can usually be answered by a single word or short phrase- for example

- It is raining (yes/no)?
- How old are you?

Closed questions generally

- Are easy to answer
- Are quick to answer
- Give you facts
- Keep control of the conversation with the questioner

They are useful for

- Opening a conversation
- Giving people confidence to answer questions
- Checking understanding

Open questions don't necessarily have one answer

- They ask people to think and reflect
- They ask for opinions, thought and feelings
- They give control to the respondent
- Open questions often start with 'what, why' or how'

Open questions

- Enable ideas to be developed
- Make people think and reflect
- Allow creativity

Your evaluation material will have a mix of open and closed questions. Closed questions are usually straightforward to quantify and report on whereas open questions will enable you to understand and report on impact but this may be more anecdotal.

Presenting data

Quantitative data
In guidance the NLHF outline principles of a good evaluation report and states that
Data is subject to robust analysis to provide evidence on outcomes
They go on to say that evaluations need to be transparent about methods used in the collection, compilation and analysis of data presented.

General points
Make sure baseline data is collected. The lottery is very clear that having an understanding of your starting point is an integral part of any robust analysis.
Be clear how the information was collected and what bias may have been introduced by the collection method. Describe any effort made to counter this bias. For example if social media was used to solicit online responses to a survey will this have missed out older people or those with limited access to the internet? Have you also tried to speak to these groups?

Always state your sample size.

Always say what time period a survey covers.

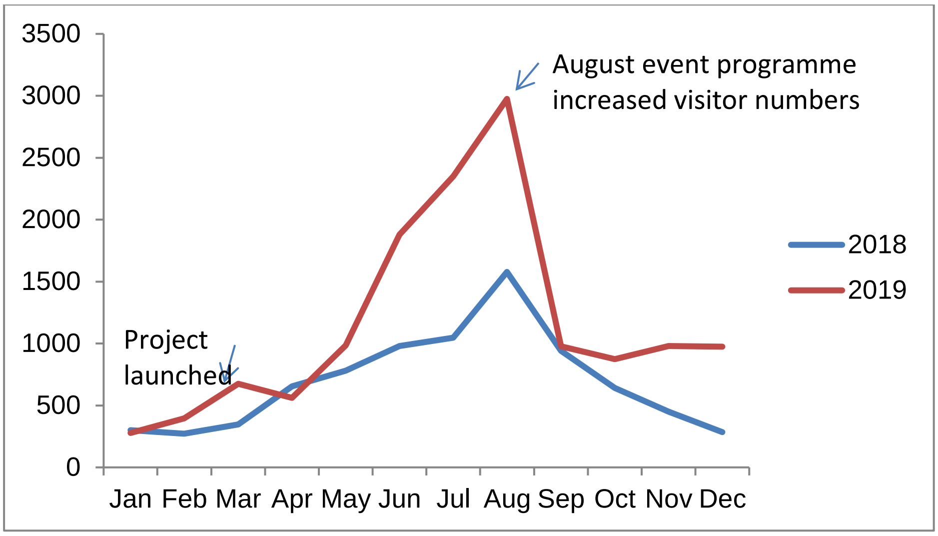
If you are talking about a sub-set of visitors be clear what proportion of your overall visits this represents. State whether you think this a reasonably representative proportion and if it's lower than you would have liked say so and say why. The NLHF gives as a good example

A survey was sent out to the cohort of volunteers in the Archeox database. The database included 642 volunteer email addresses, of which 44 were no longer active (total active emails = 598). A benchmark for good engagement from an email survey is a 10% response rate, and the Archeox volunteer survey received an actual response rate of 17% (101 survey submissions).

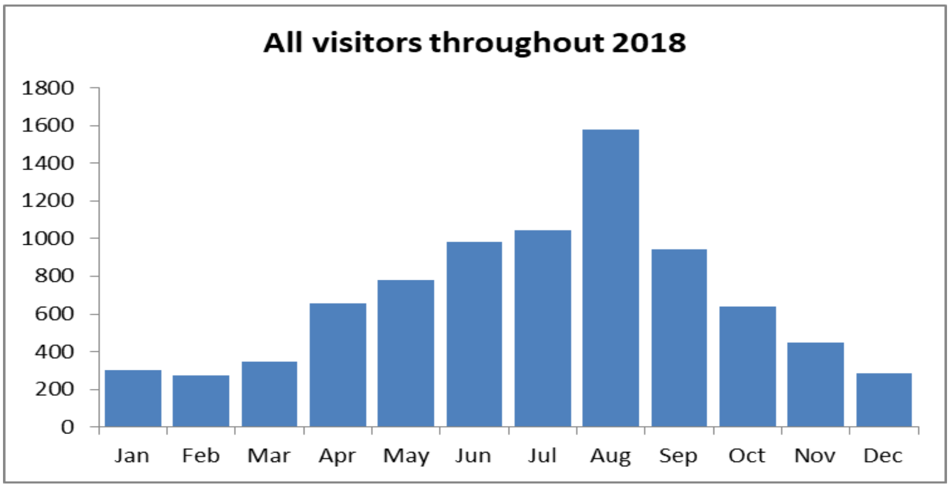
Don't use spurious accuracy by having figures or percentages shown with lot of figures after a decimal point. Unless there is a good reason not to, round up or down to the nearest whole number. If you have a small number to report on use tables, lists or short paragraphs to describe the information. As a rule of thumb don't convert figures to percentages useless you have a minimum sample of 100.

Larger datasets can be shown and analysed using appropriate visualizations. For quantitative data this is most likely to be a chart. The examples below are generated using a hypothetical data set showing visitor numbers over two years to a visitor attraction (see working examples.xlsx)

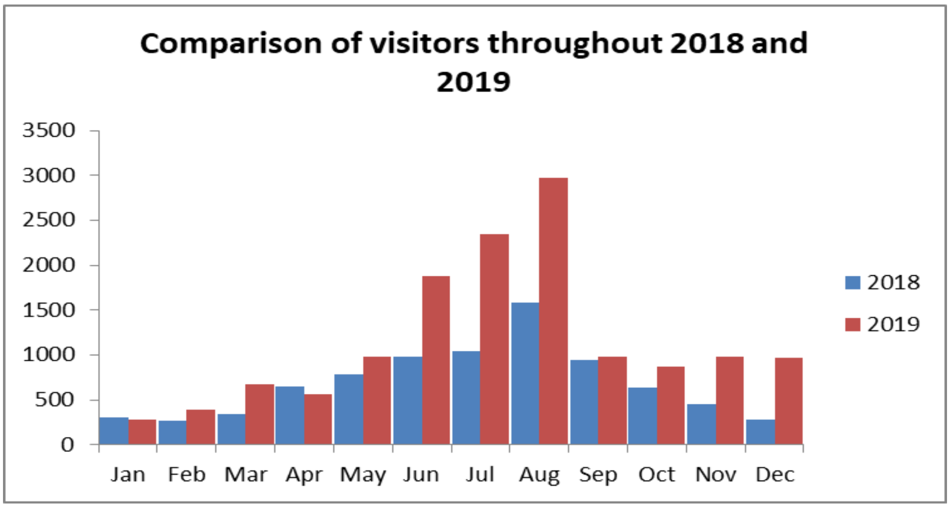
Charts
Line charts are useful to show trends such a change over a time period and to compare trends using the same time frame. They can be annotated to provide some analysis.



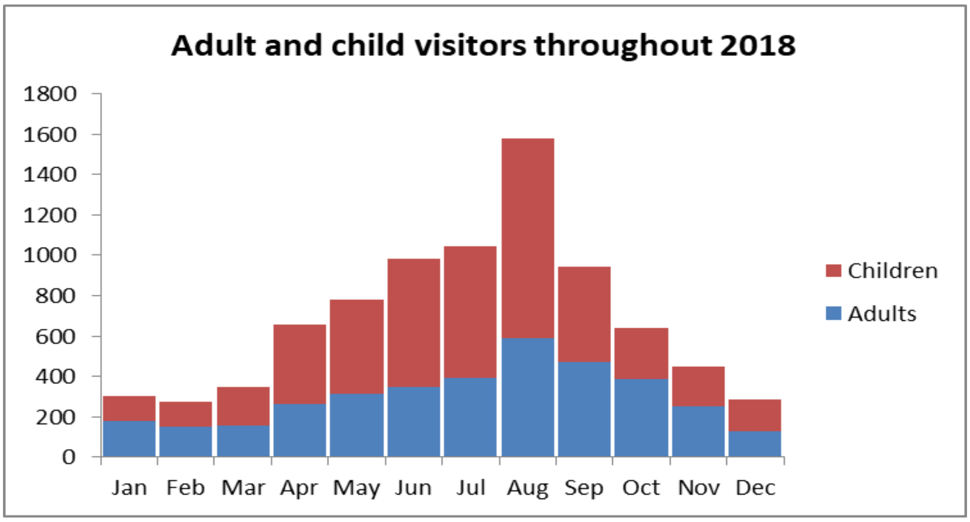
Column charts are useful if you want to compare items in a specific range of values. They are good for comparing a single category of data between sub items. For example, if you wanted to use the data from the chart above to understand distribution across 12 months of a year.



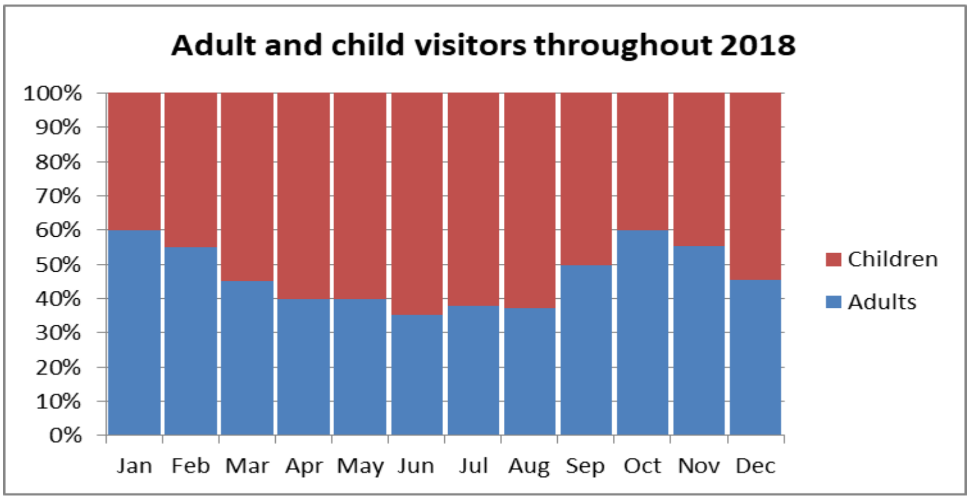
A clustered column chart can be used to show comparisons of multiple categories of data within a specific range of values.



A stacked column will allow you to compare items within a specific range as well as show sub items. If visitor data shows adults and child visitors over a year a stacked column can show any changes in this pattern throughout the year.



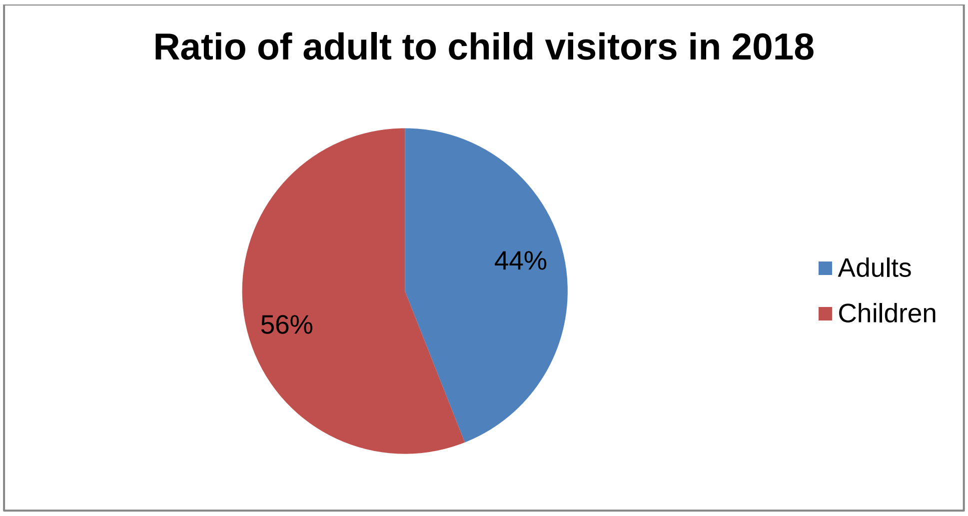
If your numbers are large enough then converting this data to percentage and using a stacked column gives a clear picture



N=8274 (if using % it's a good idea to show the total number)

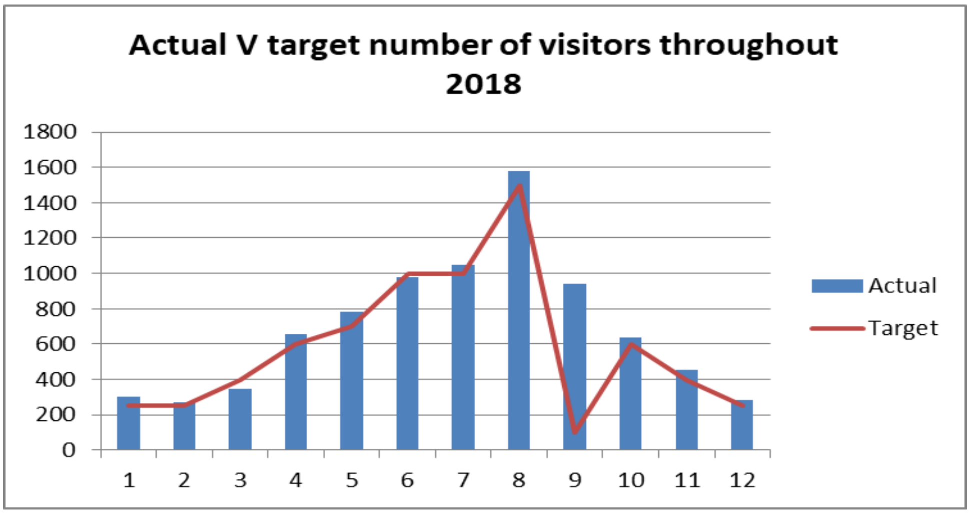
This example shows more clearly than the first stacked column that the proportion of child visitors is higher in the spring and summer months.

Pie charts can be useful if comparing a small number of categories. If too many are used the 'slices' become too small to see and are hard to interpret.



N=8274

Combining two chart types can help to compare two categories and are often used to show targets versus results



In general always provide the raw data as an appendix and add some commentary to each visualisation to interpret and analyse what you are showing.

Qualitative data

Feedback forms or cards will often have an 'other' section and will yield results that are harder to quantify than tick boxes or responses on a scale. If there are a small number of responses then summarising them in table with some commentary is sufficient. Listing responses may also be enough for small groups or events. However, for larger data sets it is possible to visualise the data using a word cloud which will emphasise more frequently used words by showing them in a larger font than those words which were used less often.

However you plan to report on or summarise the information it is a good idea to present the results in an appendix of your report. Entering the information into a spreadsheet will give you flexibility to create tables, lists and manipulate and export data to help with visualisation.

If you have a large number of responses to log then ensure consistency by agreeing on formats such as the use of capitals and abbreviations. It is possible 'clean' the data but it saves a lot of time if a consistent standard is followed. Use the review function to check spelling to help pick up typos.

Steps to create a word cloud

Review your data and look for consistent patterns in the comments. In particular look for words that link to outcomes. Select key words that you want to reflect on (around 30 works well).

There are various ways to manipulate the information to give you a frequency count of how often words are used in a range on a spreadsheet. If the key words are agreed before the data is entered because the results have been reviewed as they come, in then have columns next to the detailed entry and either use a quick coding method or enter single the key words. You can then summarise these words using the COUNTIF function. This will only count exact matches.

To count the number of times a word is used within a range which includes sentences then an array formula can be used

=SUMPRODUCT(LEN(*range of cells*)-LEN(SUBSTITUTE(UPPER(*range of cells*),UPPER(*cell with text*),"")))/LEN(*cell with text*)

(a worked example can be found in the spreadsheet Word Cloud example).

After the number of incidence has been summed used

=REPT(CONCATENATE(text," "),count)

to list the word for the number of times it is used (most word cloud generators need this)

The cloud below was created using https://worditout.com/

Collecting data on digital inputs

Many projects now produce a website or app. Outputs for a website can be measured using Google analytics so ensure that this capability is building to any site.

Be clear what outputs you are collecting and that you are consistent with reporting. Pageviews will show you the total number of times content was viewed during a specific time period. Unique pageviews aggregates the views of a user so if a user visit a website and loads a page five time this will show five pageviews but one unique pageview. Be consistent with which you choose to record.

Unless a website is a large part of a project you are unlikely to need more complex reporting. Understanding how to measure the number of users or number of times pages are seen is useful as you can link peaks to project events and publicity. If a website is the **key** part of your project then build evaluation into the brief for the developer as this is a specialist area.

With apps ensure that the app developer can build in any data collection you will need. You should at the least be able to report how many times an app has been downloaded.

Social media activity can be measured using built in 'insights' which will show how many followers a page or account has and will give a useful indication of your project's reach.

Outcomes from digital inputs can be collected by using online surveys flagged up on those platforms (some sample questions are in the question bank). Regular summaries of comments on social media posts can also give useful feedback on how other elements of a project were received such as comments after a visit to an event.

Suggested report structure

Introduction to the project
Brief description of the project –key dates and what was achieved.

Evaluation framework
Describe the framework used and how it was undertaken- for example.

The evaluation was undertaken by (…staff external to the project, project staff, our volunteers, an external project evaluator). (*If by project staff, outline the internal monitoring put in place to avoid bias such as regular reporting to line management, oversight by senior staff, use of external standards)*

This report is structured to reflect the approved purposes of the grant laid out in the project Activity Plan.

Or

The report is structured to reflect the activity plan and is divided into volunteering, events, exhibitions, new interpretation, the provision of new facilities …..

Approach 2 can give a clearer report as, for example volunteering can be relevant to a range of the approved purposes of the grant. The NLHF give as a good example a report which was divided into each project activity.

Appropriate methods to capture input, outputs and outcomes were developed for each element of the project and are described in the relevant sections.

You could choose to list data collection methods in one section but if this is a long report adding this to each section gives a clearer report. If this leads to a lot of repetition have a summary of research methods section here.

The overarching framework uses a logic model:

Input	Outputs Activities	Outputs Participation	Outcomes – select which apply (All NLHF projects must meet outcome 1, shown in bold)
volunteer and staff time and resources	Events Exhibitions Research Building Conservation Interpretation Work with specific groups	Visitors to events and exhibitions Volunteers Audiences Users of new facilities Specific group members	**A wider range of people will be involved in heritage** Heritage will be in better condition Heritage will be identified and better explained People will have developed skills People will have learned about heritage, leading to change in ideas and actions People will have greater wellbeing The funded organisation will be more resilient The local area will be a better place to live, work or visit The local economy will be boosted
Underlying Assumptions		External Factors	
How will activities lead to intended outcomes? *Make sure that links are spelled out*		Have other factors influenced outcomes? *Covid 19 is a n obvious example but others could be a new competitor nearby, roadworks impacting an event, bad weather,*	

Outcomes can of course be altered for different funders or schemes.

Baseline
Explain your baseline figures and their relevance to the project

- Local area statistics
- Current users
- Current level of awareness
- Views of current visitors

Project activity one
Give a brief description of the activity to include a clear description of how it was expected to link to the desired outcomes.

<u>Input</u>
A short paragraph outlining time spent by staff and volunteers (and the financial equivalent of their time), materials used and budget spent.

<u>Outputs</u>
What happened-i.e. how many events were produced and how many visitors attended. Explain how any figures shown were collected. If figures were estimated be clear on the rationale used.

<u>Outcomes</u>
Show how outcomes were measured by including a list of the questions asked or a description of activities undertaken. Explain what proportion of visitors were surveyed and responded and be clear about any bias that you think may have been introduced by the collection method. Explain the use of alternative ways of collecting feedback to help triangulate the data.

Summarise what outcomes were met by this activity by presenting results (see presenting the data section) and discussing what they mean. Flag up any unexpected outcomes

<u>Key successes and lessons learnt</u>
Pull out anything that worked well and flag this up explain why you think it went well. Be honest about things that didn't work so well and how you used this to adapt the project going forward or how you would recommend others do. This might include for example, lower visitor figures than hoped because publicity didn't work as expected, poor attendance due to bad weather or a targeted audience not attending because engagement didn't go as hoped.

Being honest about what didn't work as planned alongside celebrating success will demonstrate to funders that an evaluation report is objective and free from bias.

Review
<u>What worked well</u>
<u>What didn't work well and why</u>
<u>What would have happened without the project?</u>
Summary
<u>What are the key things that have been learnt by the team running the project?</u>
<u>What would you do differently next time?</u>
<u>What would you recommend other groups do differently if running similar projects?</u>

Using photographs
As a minimum the NLHF will want four images which they can use for their internal reporting and advocacy. If you are using images with identifiable people in them be aware that they may also be used on the NLHF website or in their reports so make sure any permission forms that you use include that information.

Use photographs to show a range of different people at events or exhibitions as well as participants and volunteers. Have at least one example which includes NLFH branding prominent so that you can demonstrate how the grant was acknowledged.

Make sure that before and after photographs are taken for any clearance, restoration or building work.

Focus Groups, user groups and steering groups

Focus groups
Focus groups can be invaluable when looking for evidence that a project or programme is needed and for steering the direction of a project or programme. However, it can be difficult to recruit members and you need to consider who to invite and how to run the session.

Focus groups are typically run as a group interview to gather thoughts and options around a proposed activity. Members may be unfamiliar with an area or amenity never having used or visited it and so will not have preconceived ideas. Typically a focus group would meet once and participants wouldn't necessarily know each other.

User groups
A user group would be made up of current users of a facility – for example running and walking groups using the Marriott's Way who are already familiar with the facility and will probably have strong views on changes and improvements needed.

Special interest user groups may include youth groups, school children, and groups supporting people with disabilities. They bring their own specialist skills to the table and this should be reflected in your work with them. Youth groups and schools can be rewarded by taking part in free activities offered by the project. If you want teachers to spend time out of school advising you then consider paying supply costs to the school to free them up. Twilight sessions (run straight after school finishes) rarely work as teachers often have unexpected demands on their time and will sign up but be unable to attend.

Consulting support groups for people with a range of disabilities such as MIND, SCOPE, RNIB, and RNID can be very helpful to ensure accessibility is built in from the start and you should budget to pay for their time and advice. Recruiting individuals to advise you on particular areas of accessibility can also be helpful and you should offer remuneration for their time on a professional level.

Steering groups
Steering groups are people invited to support the project because they have specialist knowledge or represent project partners or a demographic that you want to ensure are engaged. These groups would meet at regular points throughout the project to review progress and plans and suggest any changes.

Volunteers taking part in a project

Aims

Project Aims

- How many volunteers will you work with?
- Are you targeting a particular audience?
- What do you hope volunteers will gain from taking parts?
- What do you hope volunteers will contribute?

Volunteer aims

- What is their motive for volunteering?
- What do they hope to gain from volunteering for the project?

Input

Volunteer recruitment

- Money spent on adverts
- Time spent on partnerships with other organisations
- Web resources/platforms used
- Recruitment events
- Time spent meeting and interviewing volunteers

Volunteer management

- Cost of posts created to manage volunteers
- Proportion of time spent by other staff on volunteer management and cost estimate
- Item bought to support volunteers (PPE, office kit)
- Volunteer training costs
- Volunteer expenses (travel, refreshments)
- Volunteer recognition (celebration events, social events)

Outputs

- Number of hours logged by volunteers on different tasks
- Equivalence in costs
  - Unskilled £50 per day
  - Skilled £150 per day
  - Specialist/professional £350 per day
- What they have achieved. For example:
  - Number of photographs digitised
  - Area of a site cleared of undergrowth
  - Number of oral history recording made
  - Number of species of plant logged

Outcomes

Volunteers have

- Learnt new skills
- Had an enjoyable experience
- Learnt about heritage/natural heritage/ archives etc.
- Plan to engage more in future
- Plan to volunteer elsewhere
- Have improved well being

Appendix 2 shows how baseline information can be collected. An exit interview or survey for each volunteer will help to understand what the volunteers gained from taking part in the project and will help you to show which outcomes have been achieved. Example questions are shown in the question bank. Volunteer time logs.xlsx show how time can be logged.

Events and exhibitions

Aims- events

Project Aims

What will this event do to support your project aims? For example

- Celebrate a milestone in the project
- Inform more people about the work
- Entertain

Event Aims

What are the specific aims for this event? Do you want to

- Target a specific audience
- Attract a number of attendees
- Inform about particular elements of project

Input

- Staff time
- Volunteer time

Event costs e.g.

- Venue hire
- Performers
- Publicity
- Insurance
- Stalls/marquees

Outputs

- Number of performances stands/ groups attending
- Overall numbers attending
- Numbers attending from targeted audiences
- Average dwell time

Outcomes

- People learnt new information
- Peoples' views were changes
- People had an enjoyable experience

Aims -Exhibitions

Project Aims

How is this exhibition contributing to the overall project aims?

- People will have learnt new information
- people will have changed their minds about something

Exhibition aims

What are the specific aims of this exhibition?

- To tell one part of a story
- To appeal to particular audience

Inputs

- Staff time
- Volunteer time
- Design costs
- Printing and production costs
- Insurance
- Transport costs
- Installation costs

Outputs

- Overall numbers attending
- Numbers attending from targeted audiences
- Average dwell time

Outcomes

- People learnt new information
- Peoples' views were changes
- People had an enjoyable experience
- Heritage is better understood
- You may want to set specific learning Outcomes to measure against and think about what every visitor whatever their level of interest or age will take away, what most will learn about and what some (those with deeper engagement or interest) will learn about.
  - Everyone will have learnt a
  - Most will have learnt b
  - some will have learnt c

Evaluation baseline information

Understanding your potential audience will help to determine whether you reached all groups within the population. For a large scale event or exhibition people may be happy to travel for an hour whereas smaller events will attract more local audiences.
If your project covers several years and has a number of events or exhibitions then you can compare your audience make up as the project progresses.

Many of the methods for evaluating events and exhibitions are similar and using the same set of questions and techniques for both as part of a project will give comparable results.

Counting attendees

Ticketed events and exhibitions

If you use a booking system such as Eventbrite then it's straightforward to count a number of people booked. It may still be useful to estimate actual attendees on the day as, particularly with free events, people may change their mind about attending if, for example, it's an outdoor event and the weather is poor.

Using Eventbrite you can gather some details about those booking although you will need to be mindful of GDPR. You can also send them an online survey after the event.

Un-ticketed events and exhibitions

As exhibitions tend to be in contained areas then it should be possible to count people on entry. However, as an exhibition is likely to be in place for a number of days or weeks unless there is budget to add electronic counters it can be time consuming to count attendees.

If the exhibition is placed in an attraction such as a museum or heritage site then it should be possible ask them to estimate how many visitors to that site also visited your exhibition. If it's placed in a busy public space then you may need to have a rota of staff and volunteers visiting at different days and time to take head counts and extrapolate from that.

If possible limit entry points to your event so that you can station staff or volunteers there to count people as they arrive. If you have clear exit points you can put a way there for people to say how long they were on site for (a board with tick box options for example) and a box to collect feedback cards.

If it's not possible to limit entry points then have staff or volunteers do a head count estimate at agreed points throughout the day. This can be backed up by using photographs and estimating crowd size from that. Ask those undertaking the head count to estimate dwell time and factor that in.

This is an example from a project 'Resorting to the Coast' which put on a seaside revival day event on the greensward at Clacton, there was no clear entry and exit point and the event was un-ticketed. A headcount was undertaken across the whole site every hour

Time	Estimated number on site
10:30	150
11:30	600
12:30	750
13:30	900
14:30	750
15:30	500
16:30	150

As many visitors spent more than one hour on site they would have been double counted using this method. An average dwell time of two hours was estimated. Wet and windy weather coming in at around 3 PM first of all drove people into the tent and then to leave the event.

If an average of two hours on site is assumed then the total number of visitors throughout the day is estimated to be 2000.

	Count	Still on site from previous count	New visitors
10:30	150		150
11:30	600	150	450
12:30	750	450	300
13:30	900	300	600
14:30	750	600	150
15:30	500	150	350
16:30	150	150	0
			2000

However you count attendees be clear about your method in any reporting and, if necessary, suggest a range (lower estimate-higher estimate).

With an un-ticketed event, plan on getting more detailed information from a sample of visitors and build in demographic questions on feedback material.

Measuring Outcomes

Most event and exhibition outcomes will focus on people learning something new and enjoying the experience. If you develop a number of ways people can respond to you then you will capture more feedback and will also be able to see whether results are similar across different methods which may help to reduce bias. Some are more achievable at smaller events particularly time limited such as performances where you know when there will be breaks and intervals and can build in evaluation activities. For exhibitions, as they are static, asking people to fill out and return cards or forms is usually successful as long as you consider where to place the cards and how they should be returned.

If you are using external groups to deliver elements of your events such as performances then ensure evaluation is built into their brief. Be clear that you are not looking at an evaluation of their performance but of the wider experience of visitors and audiences.
Examples of a feedback form/card and some key questions can be found in appendix 3

<u>Feedback postcards</u>

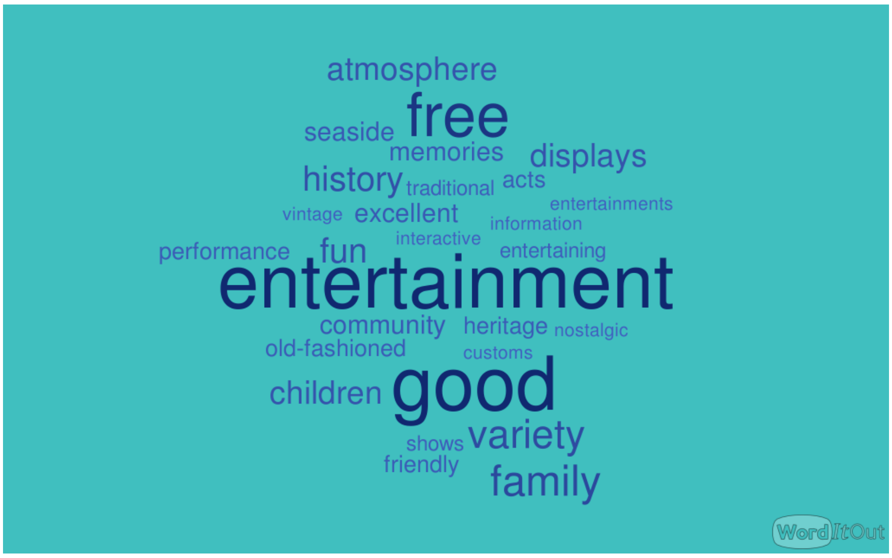
Postcards with a small number of questions can be effective at events and exhibitions. They can be designed to fit into the theme or simply reproduced on blank cards and by keeping it brief people are more likely to fill them out. Card is easier to manage than paper particularly at outdoor events but do consider the practicalities of filling them out.

Useful questions to pose are
What was the best thing/thing you most enjoyed/most fun thing about this event?
What did you find out/discover today that surprised you?
What would have made the event/day/performance even better?

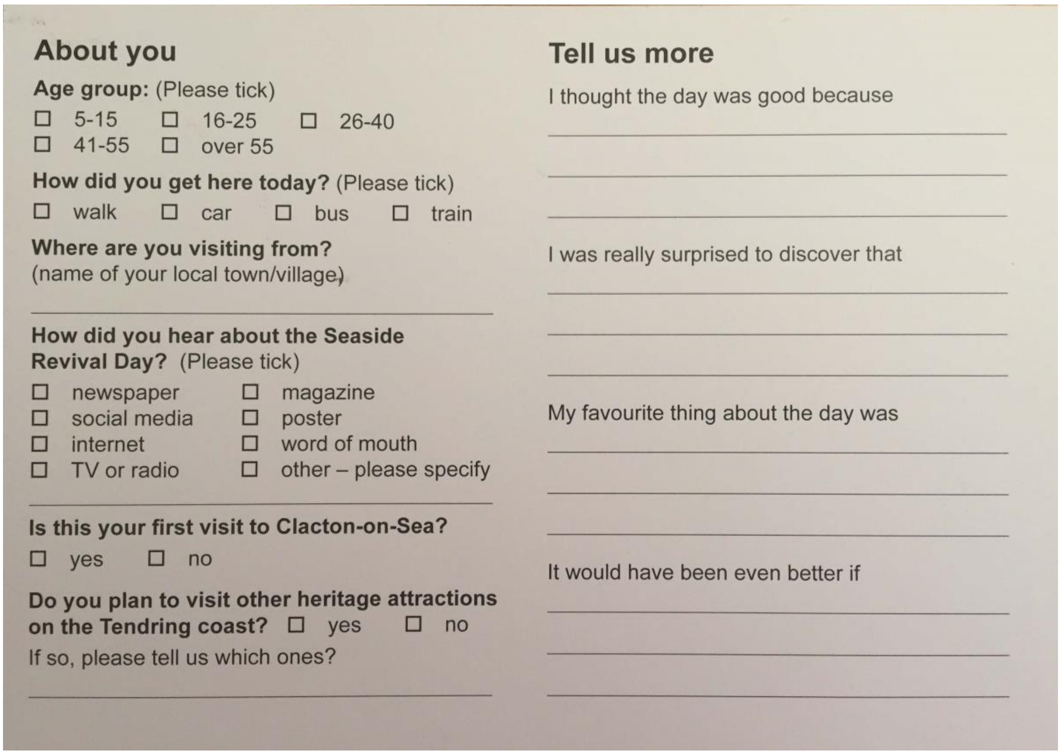
These can be analysed by looking for commonly used words to reflect your outcomes for example
‘fun’ ‘family’ ‘entertaining’
and for knowledge and information you hoped people would acquire such as

‘I was surprised to discover how old the building is’
‘I didn’t know that there were so many different butterflies here’

These can be quantified (see the ‘Presenting data’ section) data and illustrated using word clouds such as this example



You can combine this feedback with asking some basic demographic information such as age group and where they travelled from as well as how they found out about the event. For example:



About you

Age group: (Please tick)

☐ 5-15 ☐ 16-25 ☐ 26-40
☐ 41-55 ☐ over 55

How did you get here today? (Please tick)

☐ walk ☐ car ☐ bus ☐ train

Where are you visiting from?
(name of your local town/village)

____

How did you hear about the Seaside Revival Day? (Please tick)

☐ newspaper ☐ magazine
☐ social media ☐ poster
☐ internet ☐ word of mouth
☐ TV or radio ☐ other – please specify

____

Is this your first visit to Clacton-on-Sea?

☐ yes ☐ no

Do you plan to visit other heritage attractions on the Tendring coast? ☐ yes ☐ no

If so, please tell us which ones?

____

Tell us more

I thought the day was good because

____

I was really surprised to discover that

____

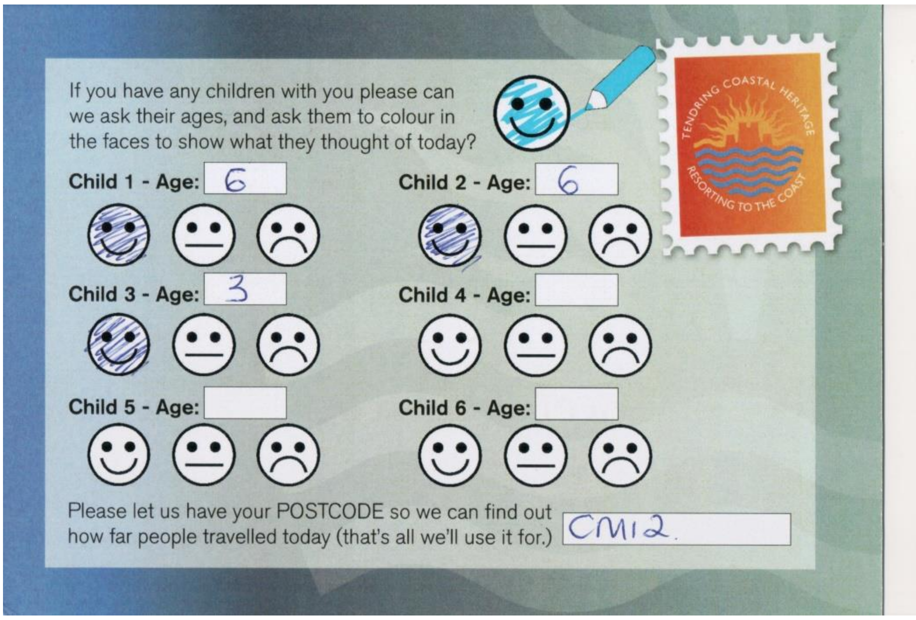
My favourite thing about the day was

____

It would have been even better if

____

To include children’s feedback you could use a simple smiley face scale as in this example



Make sure that there are plenty of pens and pencils around and it's clear where to return completed cards. If you can recruit volunteers to take these around and encourage people to fill them out then the return rate will improve. If there are chairs at an event (such as a performance) place these on the chairs.

<u>Graffiti Walls</u>
A quick way to get feedback from visitors is to set up a place where they can write a response to a question. This could be a whiteboard, poster or large piece of paper. It's worth having someone whose job it is to regularly check this and replenish pens and ensure nothing unpleasant has been written. Criticism should be left but anything offensive such as racist language or obscenities should be removed. (It's rare this happens but it's worth being clear about action to take if it should).

You can use a similar technique to ask people to rate elements of an event by having a list of what is on offer and giving people a number of stickers which they can use to show what they have enjoyed

<u>Face to face interviews</u>
This is a useful technique if you have enough staff or volunteers who are happy to chat to visitors and ask a few more in depth questions. Agree what the key questions will be in advance and make sure that your staff and volunteers are clear how they will record responses. Many phones and tablets can now record conversations and this can be useful as long as you are clear that this is happening and get permission. If you are collecting demographic information alongside this then keep that information separate. A useful way to do that here is to have the questions and possible responses listed and the respondent put a tick against the relevant response so it's not possible to link interviewees with responses.

An example introduction might be
Hello, I'm volunteering for this project and we are chatting to a few people today to find out how they feel about the event. This will help us to write a report to the (funder) and to improve any future events we put on. Have you got 5 minutes to talk to me? Your responses will be anonymous but we might quote what you say in a report. (If yes) is it OK if I record us? Once I've manged to write down the information I need I'll delete the recording.

Questions will depend on what outcomes you are trying to measure and will be similar to those posed above but this gives you the opportunity to delve little deeper.

Talking to event participants
Don't forget to include groups who are working with you to deliver an event. If you have local societies bringing stands or delivering talks and tours then ask them how this opportunity has helped their group. Talk to partner organisations about how their involvement has contributed toward them achieving their aims.

The question bank spreadsheet has example questions for audiences and community partners which may be relevant here.

Education

Evaluating work with schools and youth groups need particular consideration. If taking photographs ensure that permission to use images of children is given and as a general rule don't use names in captions. Similarly if you are quoting something a child has said it's best practice to refer to them as 'Y4 pupil' rather than by their name.

Aims
<u>Project Aims</u>

<u>School session Aims</u>
These are often called 'Learning intentions' when lesson plans are created such as this example from the Marriott's Way
'To develop and promote team work, problem solving and compare the diversity of animals in the woodland & pond habitats and explain how organisms survive there.'

Input
- Staff and volunteer time
- Resources

Outputs
- Number of sessions delivered
- Number of children taking part in a session
- School engaged from a wider area
- Greater number of schools targeted because of (for example) a large proportion of students with Pupil Premium or English as an additional language
- Pupils with Special Educational Needs or a Disability (SEND) are targeted

Outcomes
- People will have learnt about heritage
- People will have had an enjoyable time
- Learning Outcomes- schools now tend to use a scale of 'children working toward expected standard', 'at expected standard' and 'at greater depth'. Other scales used will suggest what **all** students will be able to understand, what **most** will be able to understand and what **some** will be able to understand. Any evaluation should be linked to this aspect of session design

Generic learning outcomes
Generic learning Outcomes were devised as part of 'Inspiring Learning for All' by the MLA (Museums, Libraries and Archives Council). They are not necessarily only for use for education sessions but many organisations have used them to evaluate these. More detail can be found in the question bank spreadsheet.

Evaluation baseline information
How many schools were engaged before the project?
Which areas did they travel from?
What proportion of Pupil Premium students is there?
What percentage has English as an additional language?
Proportion of Pupils with SEND
Much of this information should be on the school website or can be found in the latest OFSTED report which should be linked to on the school website or can be found by searching here https://reports.ofsted.gov.uk/

Measuring Outcomes
There are a few issues to be aware of when evaluating school sessions:
If you ask teachers to take away evaluation materials and send it back to you then it is very unlikely this will happen. Teachers are under intense time pressure and will be focussed on ensuring that they get children back to school safely so build evaluation into your sessions.

It can be difficult to get a clear response from children as they will want to be polite and tell you what they think you want to hear. If you ask 'did you enjoy today?' then you are likely to get an overwhelming 'yes' so you need to plan exactly what it is you want to uncover.

Generally for a school visit to a project you will want to understand

- Did the children enjoy the experience?
- Did they learn what you hoped they would?
- Could they mage physically or do you need to alter routes and add snack and drink breaks?
- Has the visit inspired them to change their aspirations?

Measuring enjoyment

If your session has easily identifiable sections or areas then you could set up a simple 'voting' system at the end of the session. This can be done by them dropping a token into a box or adding a sticker to a poster listing the different options.

For example:

Put a sticker on the square of your favourite part of today

The team games	The mini beast hunt	The pond dipping
Making art from things we found	Putting the trees we found in our diary	Building a shelter

Having a short feedback form which includes the question
‘What was your favourite part of the day?’
can yield interesting results but you do run the risk of children responding ‘lunch’. As rule of thumb younger children will respond well to prompts such as those on the table above and as they get older you may have more considered responses which will give you useful information.

Interviewing pupils with a list of prompts will give you a mix of responses that can be mapped to both enjoyment and understanding. Small groups can take part in chats with an adult helper as part of a plenary activity and feedback to the whole group or collect responses as a mind map.
Some prompts could be
What were you?

- Surprised by?
- Most interested in?
- Excited by?
- Disappointed by?
- Bored by?
- Can you tell me one new thing you learnt?

<u>Measuring learning and understanding</u>

Observation during your session can be invaluable for this. If a school brings adult helpers then ask if they can help with this. Teachers and Teaching Assistants are well used to this but parent helpers may feel less confident. A checklist will help standardise results. For example the Marriott’s Way session mentioned above has as one of its Learning Outcomes that ‘all students will be able to use keys to identify some plants and animals’ so a checklist might usefully include

How many pupils (make a tally mark)		
	Identified 1-3 mini-beasts	identified 1-3 trees
	Identified 4-8 mini-beasts	identified 4-8 trees
	identified more than 8	identified more than 8

Pre and post visit drawings
This can be a usual tool for comparing what a child understand before the visit and after. Using the Marriott’s Way session above as an example you could ask children to draw mini-beasts before the session and again afterwards.

The framing of your question can be adjusted to reflect the age of the group and the learning outcomes. An example below would see whether children understood that different mini-beasts lived in different habitats and would check this understanding afterward. (the pictures would need to be larger)

What minibeasts do you know? you know where they live? Can you draw them onto this picture?

General evaluation form templates for primary and secondary pupils are in appendix 4.

Capital Projects

Evaluating capital projects or capital elements of larger projects will in many ways be similar to other aspects of a project. Clear links to NLHF outcomes can be made and the impact of work on different audiences considered.

Input
Inputs for capital projects are similar to all projects and will include budget, materials and time. Logging these will depend partly on council procedures but systems need to be in place that can clearly identify

- NLHF grant spend
- Spend from other sources
- Project staff time
- Other council staff time
- Volunteer time
- Time and money spent by contractors on training and supporting apprentices involved

Outputs
Outputs will depend on the project but should be clearly identified and linked to KPIs. They are likely to be concrete progress points in a build or restoration that can be easily identified such as the installation of sails on a mill. Other outputs will include training sessions delivered to apprentices, volunteer or trainees and the number of events designed to inform prole about progress and attendees at these.

Outcomes
All NLHF projects must meet outcome 1

A wider range of people will be involved in heritage

and of the other eight outcomes capital projects are likely to be able to demonstrate that as a result of the project

- Heritage will be in better condition
- Heritage will be identified and better explained
- People will have developed skills
- The local area will be a better place to live, work or visit
- The local economy will be boosted

A wider range of people will be involved in heritage
This can be demonstrated by showing that the capital project has resulted in more people visiting a site or a wider range of people now find it accessible. Establish a baseline of the number of visitors, the age range, gender and socio-economic classification and use this to compare visitor patterns after the project. If physical accessibility has been an issue then budget for some specialist advice and consult user groups – for example

Hear for Norfolk https://www.hearfornorfolk.org.uk/

Vision Norfolk https://www.visionnorfolk.org.uk/

Equal Lives https://equallives.org.uk/

Using some of the questions in the question bank for specific users you could create a short survey aimed at people with disabilities to show how people feel in the spaces created by the project.

Heritage will be in better condition
Demonstrate how the project has stopped a building deteriorating and given it a new lease of life. Make sure that a good photographic record is kept of before, during and after the project.

Heritage will be identified and better explained
This outcome will be met if stages of restoration are explained and illustrated to a wide audience. Events such as talks and tours aimed at both specialist groups and members of the public will widen understanding of how a tangible heritage assess is cared for as well as its importance in the locality. Virtual tours, videos, web pages and social media posts and press releases throughout the project will all contribute to this.

Keep a log of press and social media activity and collect responses to posts. Tours and talks can be evaluated using ideas from the events toolkit provided.

People will have developed skills
If specialist firms are employed ask them to log any time spent by apprentices working on the project. If procurement rules allow then encourage tenders from companies with a good apprenticeship scheme and be clear about this to the lottery.

Interview apprentices and ask them what they feel they have gained from the project and what they hope to move onto in future.

If volunteers are involved then use the volunteer baseline questionnaire coupled with an exit interview to record what new skills they feel that they have developed.

Encourage project trainees or interns to keep a learning log.

The local area will be a better place to live, work or visit
This outcome can relate to people feeling safer in an area, finding it more pleasant to spend time somewhere or an increased sense of pride in their locality.

Feedback cards in new facilities such as a café using questions from the question bank can give feedback on how people are now experiencing an area. Monitoring review sites such as TripAdvisor can help to build a picture.

Work with local community groups can contribute to this outcome particularly if it has encouraged wider partnership working and supported them to build their skills base. Encourage groups to feedback using questions from the 'Community Partners' tab either by discussion at network meetings or via interviews or questionnaires.

The local economy will be boosted
This can be demonstrated by showing how procurement has contributed to the local economy by direct and indirect spend.

Bringing more visitors to an area will impact on the economy in that area if tourists visit other attractions and local shops or amenities. Asking visitors whether they plan to visit other sites in the area can help to demonstrate that this is happening.

VisitBritain discusses various figures associated with tourism in the UK which you may want to use when showing an impact on the local economy. As these figures change are and currently focused on Covid 19 impacts change check the website for latest information and advice https://www.visitbritain.org/visitor-economy-facts

Demonstrating lack of bias

If an evaluation is carried out by those responsible for delivering or managing a project you will need to show how you have maintained objectivity.

All projects will have a risk log so include a lack of objective reporting as a risk and add in clear management strategies to avoid this. This can then be included on the evaluation report. Clarify the internal reporting structure- who inside Norfolk County Council is receiving updates on progress and how is this being monitored and managed. What steps will be taken if issues are identified

Look for external checks and balances. If firms are using apprentices then how is their progress monitored? Are they attending college and how is progress monitored there?

Use external standards for example

https://www.visitenglandassessmentservices.com/our-schemes/visitor-attractions/	Quality standards for visitor attractions
https://www.visitenglandassessmentservices.com/our-schemes/national-accessiblescheme/	Accessibility standards
http://sandfordaward.org/apply	School visit quality standard
https://www.lotc.org.uk/lotc-accreditations/lotc-quality-badge/	Outdoor learning quality standards
https://kidsinmuseums.org.uk/what-we-do/manifesto/	Family friendly museums
https://www.welcometoexcellence.co.uk/training-courses/welcoming-all-customers	Welcoming all visitors
https://www.visitbritain.org/business-advice/make-your-business-sustainable	Sustainable visitor attractions
https://historicengland.org.uk/advice/hpg/compliantworks/buildingregs/	Listed building compliance

If you are getting advice from specialists such as Historic England Inspectors include any of their comments in the report.

The best way to demonstrate lack of bias is to be clear about what hasn't worked as expected as well as celebrating success. Don't try to hide things that didn't work but acknowledge them and explore why making, recommendations for how future projects may improve outcomes. Show that you understand self-assessments may introduce a bias and clearly explain steps taken to mitigate this.

Best practice and pitfalls to avoid

The National Lottery Heritage fund list six principles for good evaluation

1. Use a logical framework setting out links between activities, expected outputs and outcomes for all elements of the project
2. Use appropriate and methodical ways of asking your audience questions that provide robust evidence including coverage of well-being as well as demographic, economic, social capital and quality of conservation issues where appropriate
3. Robustly analyse your data to provide evidence on outcomes
4. Make your evaluation objective and free from bias
5. Clearly and sufficiently present any results
6. The conclusions and recommendations are sufficiently clear to enable stakeholders to identify and apply any lessons learned.

	Best practice	Possible pitfalls
1	Have a clear framework with shows what outputs and outcomes you are hoping to achieve Make clear why you expect an activity to lead to an outcome	Confusing outputs with outcomes. The number of visitors at an event is an output. Evidence that 75% of those visitors learn something new is an outcome Listing outcomes without saying how they were achieved
2	Be clear about how evidence has been collected and show how you have tried to avoid bias Make sure that your questions allow negative as well as positive responses Ensure demographic questions allow full representation Use clear language and check readability of questions Consider alternatives to written surveys to ensure those who struggle to read written English are able to take part use a range of ways to collect information	Asking leading questions Not allowing criticism or not reporting negative comments Only allowing a limited range of answer to demographic questions (e.g. limiting gender identification to M or F)
3	Present data clearly showing all steps used Show all steps of analysis Explain any limitation within the data Talk through patterns in the data and how they relate to outcomes making clear links	Over interpreting small data sets Using inappropriate statistical methods on small data sets Not explaining what the data shows but assuming it's obvious

4	Show that you understand any possible bias and explain how you have tried to counter this Link to external standards	Hiding bad news Only celebrating success
5	Use appendices to provide the full data behind any results make clear links to activities, outcomes and results use appropriate methods ways to visualise results	Showing charts with no figures available to back them up Taking about successes without linking this to actual results
6	Gave a clear summary where key successes and learning points for the sector are summarised	Not pulling together lessons learnt and just listing achievements without considering how they could have been improved. Not being open and honest about where things didn't work as planned and why or how this happened.

Changes and challenges – internal and external. Unforeseen events Major problems and project changes.

Drawing conclusions, finessing honesty about good and bad outcomes.