



Friendly Evaluation Toolkit



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INTRODUCTION

What's this toolkit for?

To help you understand the different types of evaluation and think about what you are trying to evaluate and how. It will also give you some real, practical, useful examples of evaluation techniques that other people have used, and that you can modify for yourself.

There are a few things to remember about evaluation:

- There is no 'big secret'
- One size does not fit all
- It is not an exact science
- Start small
- Be realistic
- Keep it simple
- There is no such thing as free evaluation – you will need to plan in some of your time (however limited)
- Share the evaluation with a colleague so you have someone with whom to plan and discuss your findings
- Evaluation is one of the compulsory elements of the National Trust Learning Vision

Section 1: What is evaluation?

Evaluation is a daily human activity, an essential step in the process of integrating learning and moving on to new discoveries. Evaluation supports the desire to understand more deeply, see the truth more clearly and act more effectively (Gerry Moriarty author of 'Sharing Practice', a guide to self-evaluation in the context of social inclusion, Arts Council England 2002).

You can evaluate any learning project. You might think about splitting what you do into two broad categories – 'products' (leaflets, panels, exhibitions, interactive exhibits and resource packs) and 'activities' (user-led, staff or volunteer led, group activities and events). We'll call products and activities 'projects' throughout this toolkit to make things simpler.

Evaluation is a process. It's about trying to make an unbiased objective judgement about the value and quality of a project based on the analysis of collected **qualitative data**¹ and **quantitative data**.² It should take place at various stages in the project development.

You should think about evaluation before starting a project and all the way through. In fact, you will probably be evaluating what you do already without even thinking about it. As well as giving you vital information that will make your project much better in the end, using fun, innovative approaches to evaluation often means that the evaluation itself can become part of the most enjoyable bit of the project!

You can carry out evaluation yourself **self-evaluation**³, or you can involve other people in your field of work **peer evaluation**⁴. For larger or more important projects, you may want to pay an external consultant to carry out the evaluation. This toolkit is designed specifically to help you or your peers carry out your own evaluation, but you will find that the techniques described follow good practice and external evaluators will use the same methods.

¹ Information gathered from what people say and feel and what is observed or deduced, evaluation of learning requires a strong focus on qualitative evidence

² Any information which can be counted

³ Project members themselves conduct the evaluation

⁴ Other people in your field of work conduct the evaluation

Section 2: Why bother evaluating?

Sometimes it can seem like a bit of chore to make sure you include the right amount of evaluation in a project. However, if you give it a go, it can make a really powerful, positive difference to your project. Take a look at all the good things about evaluating.

It can:



All these act as an excellent tool for **external reporting and accountability**⁵, especially to funders.

If you don't carry out any evaluation you could:

- Waste time
- Waste money
- Produce something that you can't change
- Lose interest from your target audience
- Lose a good opportunity to learn something useful
- Lose an opportunity to tell people about the good work you are doing
- Lose funding

⁵ Evaluating a project can often come about in response to the project funders who want information about how successfully it has met its aim and objectives.

Section 3: Where do I start?

The easiest way to build in evaluation for any project is to formulate a plan (sounds ominous but it can be a very useful tool that will help you think it through methodically!). Print out the “Planning My Evaluation” template (see [Section 9](#)). As you work through the toolkit you will need to refer to this and hopefully make good use of it with your future projects.

There are different (and equally important) stages in the evaluation process. Ideally evaluation should be integrated throughout, but in reality it is still better to evaluate at one stage rather than not at all, especially during the early stages of your project.

3.1 ‘Before the project’ (front-end) evaluation

When?

At the planning stage, when you begin talking to your partners and/or your [target audience](#)⁶. You may need to find a representative sample of your target audience to consult with. These may not be the actual people you are going to work with during your planned project.

What?

Formulate jointly agreed **SMART** aim and objectives (see [Section 10](#)) and intended learning outcomes (see [Section 11](#)) for your project. What you are doing must be an integral part of your Property Learning Plan / Property Management Plan. Within your project, ideally your specific objective-setting should be done with your partner organisations and participants. Record these in your Planning My Evaluation template (see [Section 9](#)). These will apply throughout all stages of the project and evaluation process and are the key to easy and successful evaluation at all stages.

Why?

Getting the aim, objectives and intended learning outcomes right for your project is the most important part of the evaluation process. Reassure yourself that there is a need for this project in the first place! At this stage you create opportunities for ownership to take place, you become clear about the purpose of the project and you understand the needs and expectations of your target audience. If you need to develop some [prototypes](#)⁷ to test out your project (e.g. mock up leaflet or interactive game), doing some front-end evaluation will help you start off with a better version.

Decide

What you aim to evaluate for this project. Depending on the time and resources you have, you need to decide here on what you want to find out and why. You may decide to focus on all or some of the intended learning outcomes or the project objectives or both. You do not need to evaluate everything all of the time. Who is the evaluation report for? – This will help you decide what you aim to evaluate. Record this in your Planning My Evaluation template.

Measuring learning? – if you are measuring learning you will need to find out where the participants are starting from for comparative purposes (so you can measure change at the end of the project). Data can be gathered using [evaluation tools](#)⁸. This is called baseline data.

Using other feedback - what feedback do you already have about similar projects that you can use at this stage?

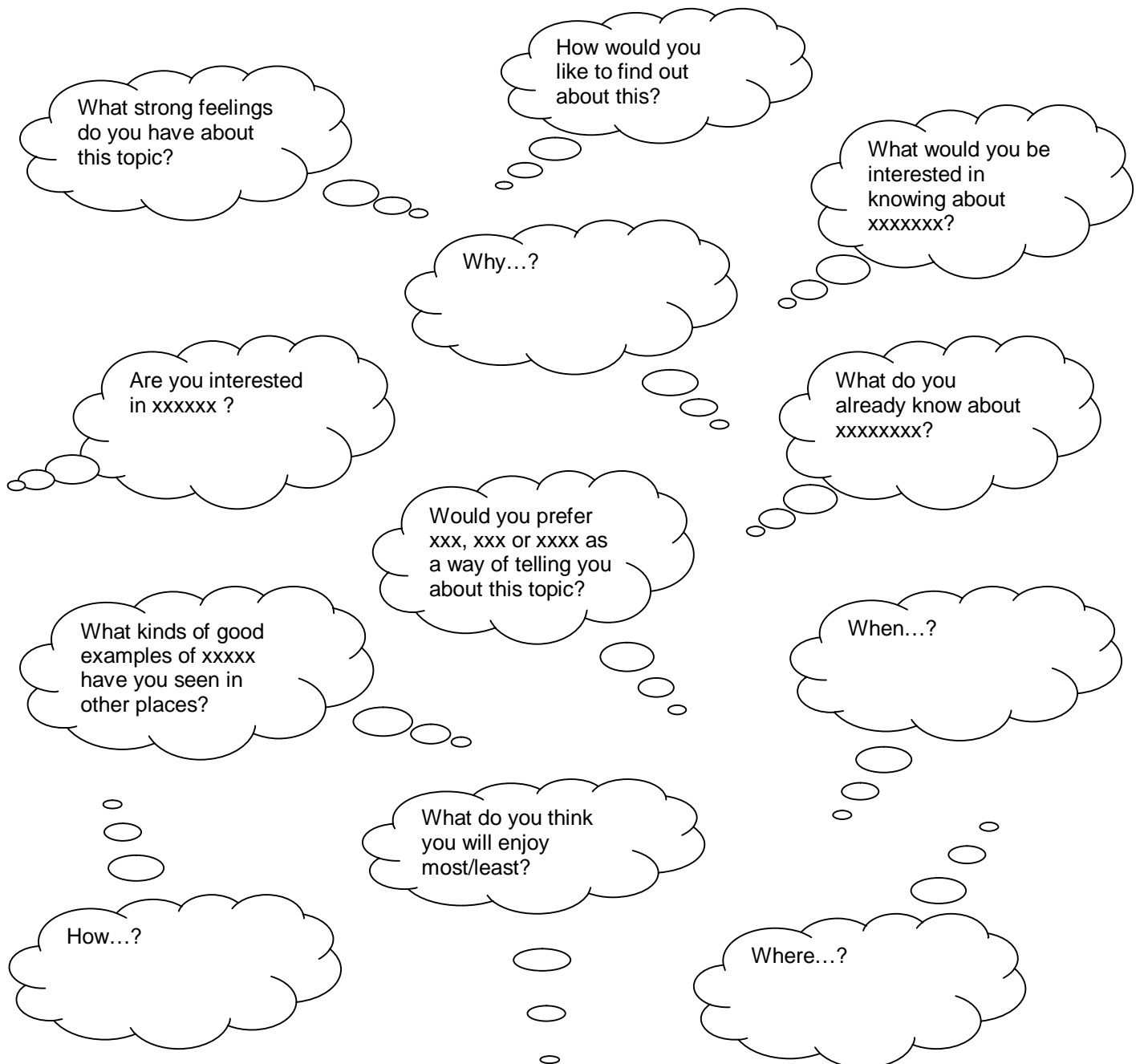
Want to find out about benchmarking? Do you want to compare what you have achieved with others to help put your work in context – Refer to Benchmarking see [Section 13](#).

⁶ The specific group of people you are aiming to reach with your project

⁷ Trial activity or product

⁸ Different methods for gathering data related to the questions you want answered

These are the types of questions you may wish to ask at this stage of your project. You will have much more specific questions for your project and remember that you there are many evaluation tools you can use beyond paper-based questionnaires.



3.2. 'During the project' (formative) evaluation

When?

During the development of the project

What?

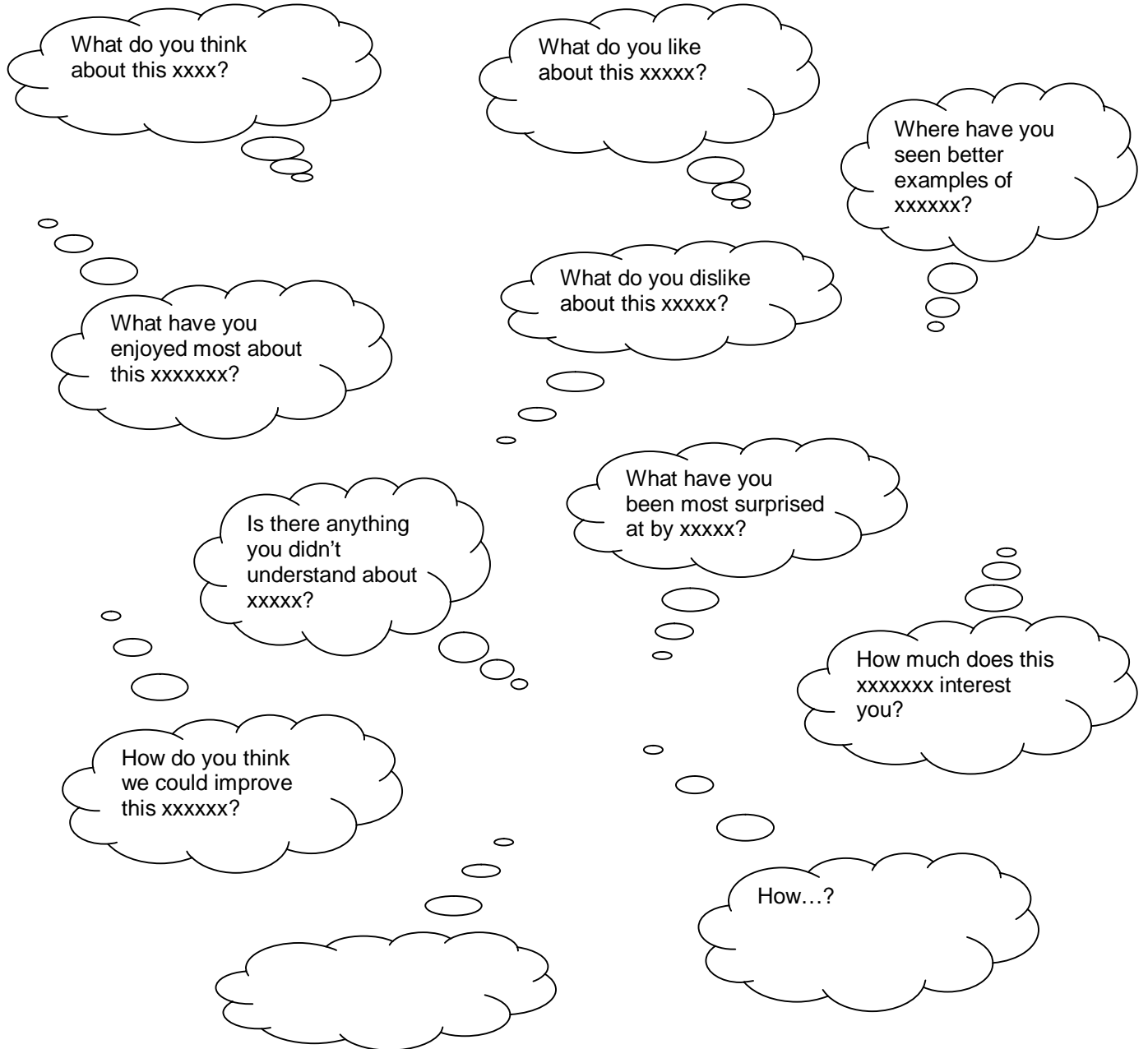
Involving users or representatives of your target audience in commenting on the bits of the project you've started developing

Why?

To check that the project is continuing to hit your objectives and that it meet the needs and interests of the target audience. It's vital to know this before it is too late or too costly to make changes!

Remember - there must be scope for things in the project to change according to your findings at this stage. Some trickier or expensive projects may need two or more formative evaluations e.g. interactive exhibits

These are the types of questions you may wish to ask at this stage of your project.



3.3. 'After the project' (summative) evaluation

When?

After the project has been completed. Can also be repeated 3-6 months later to see whether the project has had any lasting impact on the target audience

What?

Used to determine the extent to which the project met its aim and objectives and intended learning outcomes with the target audience

Why?

To inform future planning, to report on success, to celebrate your achievements!

These are the types of questions you may wish to ask at this stage of your project.

Have you found out anything new?

In your view what are the strengths and weaknesses of xxxx?

Have you learnt or improved on any skills?

How...?

On a scale of 1☹ to 5☺ how much have you felt inspired by xxxxxxx?

On a scale of 1☹ to 5☺ how much have you enjoyed the xxxxxxx?

If you could change one thing about the xxxxxxx what would it be?

When ...?

Do you feel inspired to xxxxx after seeing this xxxxx?

Section 4: Choosing the best evaluation tools

1. Evaluation tools are different methods for gathering **data**⁹ related to the questions you want answered.
2. So, first think about the sorts of questions you need to ask and then think about how you are going to ask them. Use two or three evaluation tools – this will give you a better picture.
3. Try not to use more than three evaluation tools - you don't want to get bogged down in piles of data that you will never use. If you don't know what you're going to do with the data don't collect it!
4. Remember to gather views from the various perspectives of those involved e.g. pupils, teachers, partners, project team, staff or parents (depending on what you want to find out).
5. Choose tools that are 'friendly' to the participants/users and suitable to the nature of the project. Choosing the tools with participants/users is even better. Remember that good evaluation will become a really interesting and enjoyable part of the experience, both for you and the participants.
6. Always try out your methods – for example a questionnaire that seems clear to you may not be to someone else. Be prepared to change your wording or approach.
7. Decide how big a sample you will need to be comfortable about the results you hope to get. However, even if you only have time to consult a couple of people, this is much better than going ahead regardless.
8. Record your decision about the tools you will use to your Planning My Evaluation template see **Section 9**.

Refer to the separate document **EVALUATION TOOLS TABLE** which describes examples of many different evaluation tools you can choose from

⁹ evidence which has not yet been interpreted

Section 5: Making sense of the data you have collected ('analysing')

1. You will need to analyse your **data**¹⁰ to provide **information**¹¹ on which to make judgements and decisions. Methods of analysis are difficult to describe here, but they will be much more obvious to you in a real situation.
2. Remind yourself of your project aim and objectives – and consider your data in this context.
3. Remember that you can look at the evidence you are collecting as you go along. This is especially important in the first stages – if you stop to think more deeply about your evaluation findings at the front-end or formative stages, you will almost certainly be able to use this information to improve your project.
4. Reduce your data to chunks that you can easily work with. Identify key themes and look for patterns, trends and specific issues arising. Analysis of your data will mean different actions in different situations. Here are two examples of the different extremes of evaluation.

Example 1: You talk to a teacher after a workshop you have conducted. You use her comments to help you improve your lesson plan for next time.

Example 2: You conduct an in-depth statistical analysis of 500 detailed questionnaires which asked visitors about their views on an exhibition. The questions were structured around basic audience profiling as well as a detailed investigation of the learning outcomes.

These are only a couple of examples – there are many ways to analyse data, some feel more 'scientific' than others, but remember that whatever you are able to do, given your skills and time, will help you understand how to make your project better.

5. Analyse the data by asking questions such as:
 - To what extent were the project aim and objectives achieved? How do you know? What evidence do you have?
 - What impact did the project have on the participants? How do you know? What evidence do you have?
 - Were there any unexpected outcomes? (you need to identify these and why they may have occurred)
 - What you would do differently next time?
6. Summarise your findings to remind yourself why you are progressing in a certain way.

¹⁰ Evidence which has not yet been interpreted

¹¹ data which has been interpreted

Section 6: Telling people about the evaluation results

1. Think about who you are going to communicate your evaluation findings to when you are planning your evaluation, so you will have a clear idea about what they will need to know.
2. You can think creatively about ways of reporting information depending on your audience e.g.
 - Training events
 - Conferences and seminars
 - Meetings at your property or elsewhere
 - Video
 - Website
 - Intranet
 - Newsletters
 - Written report
 - Funder reports
3. For some excellent advice on reporting and sharing and a suggested format for a written evaluation report see Stage 5 'Reporting & Sharing' in '*Partnerships for learning – a guide to evaluating arts education projects*' by Felicity Woolf for the Regional Arts Boards and the Arts Council of England <http://www.artscouncil.org.uk/artsmark/documents/Partnerships.pdf>
4. Remember to find out whether all the participants and partners are happy to share the findings from the project (as well as how widely and at what level of detail).

Section 7: Implementing the findings & reaping the benefits!

1. There is no point undertaking evaluation if you are not going to use it in any way.
2. If you carry out front-end and formative evaluation you will almost certainly affect the quality of the project in a positive way.
3. Consider and apply what worked and what didn't to future projects. Make a list of positive and negative points that you will consider for future planning.

Section 8: Evaluation ethics

1. You must tell participants you are conducting an evaluation and how you will use their feedback.
2. If you are taping a focus group with a mini-disc or tape recorder you must ask permission first and tell them how it will be used
3. You must ask for written permission to quote or photograph a participant in a report or agree that their comments will be anonymous before you begin. See the NT Intranet for further guidance on copyright issues or contact Regional or Central CLV Staff with any queries.

Section 9: Planning My Evaluation Template

EVALUATION PLAN FOR: (NAME OF ACTIVITY / PRODUCT)	
Target audience of project <i>(be specific)</i>	
Timescale	
Aim of activity or product <i>(the main purpose of a project, i.e. why it is taking place - not the details of what will be done)</i>	1.
Objectives of project <i>(specific things partners want to achieve as part of the project – steps towards the overall aim, what will be done)</i>	1. 2. 3
Intended learning outcomes of project (people related) <i>(what you want people to learn from the project)</i>	1. 2. 3.
Who are the evaluation findings for?	
What are we aiming to evaluate? <i>(this might be for example the whole project or one element of it)</i>	
What questions need asking about what we are aiming to evaluate?	
'Before' (front-end) evaluation tools	1. 2.
'During' (formative) evaluation tools	1. 2
'After' (summative) evaluation tools	1. 2.

Section 10: SMART aim and objectives

<p>Aim (s)</p>	<p>The main purpose of a project i.e. why it is taking place (not the details of what will be done)</p> <p>NB. Sometimes you might need more than one aim to satisfy all stakeholders¹² with a series of steps (objectives) towards each aim. More than 6-8 objectives per aim will become difficult to evaluate.</p>
<p>Objectives</p>	<p>Specific things partners want to achieve as part of the project – steps towards the overall aim, what will be done</p> <p>Ideally objectives should be SMART:</p> <ul style="list-style-type: none"> • Specific • Measurable • Achievable / Agreed • Realistic / Reviewed • Timed

¹² Other individuals or organisations that have a vested interest in the project

Have a go yourself:

	<u>Your</u> example	An example
Aim		<ul style="list-style-type: none"> • To encourage an understanding of and enthusiasm for archives among children and teachers.
SMART Objectives		<ul style="list-style-type: none"> • By researching and creating themed boxes to encourage access to elements of the archive collection • By providing ten hands-on and role-play sessions for children to make, catalogue, conserve and research records by 20/06/06 • By demonstrating to teachers the learning potential of using archives in the study of history, science, art, literacy and PSHE/Citizenship at the planned INSET day 20/01/05 • By signing up 3 schools to the project by 30/01/05

Section 11: Intended Learning Outcomes

What is learning?

Learning is a process of active engagement with experience. It is what people do when they want to make sense of the world. It may involve an increase in skills, knowledge, understanding, values and the capacity to reflect. Effective learning leads to change, development, and the desire to learn more. It is about personal development which leads to change. That change can be cognitive, cultural, emotional, social, sensory or physical. The National Trust defines learning as encompassing education and interpretation, formal, informal and community-based learning. (From the National Trust Learning Vision)

What are intended learning outcomes?

The 'Inspiring Learning for All' framework from the Museums, Libraries and Archives Council identifies generic learning outcomes and provides a solid framework for assessing evidence of learning which can be used to improve approaches to evaluation (see <http://www.inspiringlearningforall.gov.uk> for more information).

Intended Learning Outcomes, based on Generic Learning Outcomes (GLOs)

Remember:

- Not all projects will be aiming to meet all the GLOs or even each of the five main categories
- Learning outcomes need to be SMART too

<u>Generic learning Outcome headings</u>	<u>Generic learning outcomes</u>	<u>Your example?</u>	<u>Example</u> After a Victorian toys workshop family groups will:
Knowledge and Understanding	<ul style="list-style-type: none"> • Knowing what or about something • Learning facts or information • Making sense of something • Deepening understanding • How the National Trust operates • Making links and relationships between things 		<ul style="list-style-type: none"> • Have better understanding of how Victorian children used their spare time
Skills	<ul style="list-style-type: none"> • Knowing how to do something • Being able to do new things • Intellectual skills • Information management skills • Social skills • Communication skills • Physical skills 		<ul style="list-style-type: none"> • Have developed their making skills • e.g. drawing, cutting and sticking
Attitudes and Values	<ul style="list-style-type: none"> • Feelings • Perceptions • Opinions about ourselves (e.g. self esteem) • Opinions or attitudes towards other people • Increased capacity for tolerance • Empathy • Increased motivation • Attitudes towards the National Trust • Positive and negative attitudes in relation to an experience 		<ul style="list-style-type: none"> • Be proud of what they have achieved as a family and praise others family's work
Enjoyment, inspiration and creativity	<ul style="list-style-type: none"> • Having fun • Being surprised • Innovative thoughts • Exploration, experimentation and making • Being inspired / feeling creative 		<ul style="list-style-type: none"> • Have had the opportunity to be creative as a family group
Activity, behaviour, progression	<ul style="list-style-type: none"> • What people do • What people intend to do • What people have done • Reported or observed actions • A change in the way that people manage their lives 		<ul style="list-style-type: none"> • Have more confidence in visiting the historic house on the future

Section 12: Provide financial evidence for benefits of undertaking learning events at properties

As well as evaluation as a way of collecting evidence about learning outcomes to help you improve your project, and to tell people about your successes, you may wish to find a way to explore the further benefits to your property. There is an example in this toolkit of a reporting questionnaire that you may use to collect information to help you argue for the wider benefits of delivering learning projects.

This form 'Measuring Performance' contains a large number of different areas you might want to examine. Not all of these will be desirable, appropriate or even possible for you or others to collect at your property. Use this as a starting point. Create your own form with the questions that are useful for you.

Section 13: Benchmarking

Before you develop your evaluation process too far, it may be worth taking a bit of time to think about the 'so what' factor.

Once you have found that, for example, 80% of your visitors learned a new fact from your leaflet / guided walk, or 2 people said that they would promise to recycle more when they got home; you may then wonder what the significance of this is. Does this compare favourably or unfavourably with other activities at your property? What about at other properties or in other organisations?

You may find that you did something similar last year, or you may know that a neighbouring property carried out a similar activity last week. Is it worth considering using the same evaluation tools as last time / as they used? Is it worth thinking about the wording of your questions so that you can more easily compare your results with others?

Consideration of benchmarking is by no means compulsory, but it may well help you to put your findings in a much better context when it comes to doing a final report.

Within the National Trust, some basic data collection and analysis takes place each year. Reports are available for:

- Annual general Visitor Surveys
- Annual Mystery Visitor Surveys (in 3 waves)
- Bi-annual Members' Surveys

For more information, contact the Business and Market Research team or refer to the Intranet – click on Customer Services \ Customer Insight.

The Central Learning Team has also commissioned specific learning related research and evaluations. For the summaries and full reports, go to the Intranet – click on Customer Services \ Community Learning & Volunteering \ Learning \ Key documents & reports or contact the Central Learning Team for more information.

Section 14: Acknowledgements

Internal

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- Alison James, Museum Consultant (Audiences)
- Department for Education and Skills (DfES)
- Felicity Woolf in 'Partnerships for Learning' for the Regional Arts Boards and the Arts Councils of England 1999.
<http://www.artscouncil.org.uk/artsmark/documents/Partnerships.pdf>
- Hayton Associates
- Jo Graham, Learning Unlimited
- Measuring Success – A Guide to Evaluating School Grounds Projects. Learning through Landscapes (LtL) Tel: 01962 846258 schoolgrounds-uk@ltl.org.uk
- Research Centre for Museums and Galleries
- Scottish Arts Council (SAC)
- South West Museum, Library and Archive Council (SWMLAC)
- The Museums, Libraries and Archives Council (MLA)