the audience agency

Guide to evaluation, v.1

Historic England

High Street Heritage Action Zones

for Lead Partners, Cultural Consortia and National Cultural Commissions

Devised by The Audience Agency

Contents

1. Introduction to this evaluation guidance and toolbox

This Evaluation Guidance and Toolbox is designed to help you make important decisions for how you will evaluate your High Street Heritage Action Zone (HSHAZ) community engagement and cultural programmes. It offers practical guidance whether you are delivering your evaluation in-house or commissioning it from an external evaluator.

It has been designed specifically for Historic England High Street Heritage Action Zone Scheme (HSHAZ) Partners and Cultural Consortia leads - to help evaluate schemes and projects. Please also refer to the accompanying document which sets out the outcomes frameworks for community engagement and cultural projects at a Programme level.

By evaluating your own scheme and projects you will be able to describe what was most important, effective or interesting. This document offers guidance and tools, and some inspiration, for your own scheme and project evaluation.

The guidance and toolbox is designed to help you evaluate your schemes and projects, so that you can understand outcomes and impacts in your own terms, particularly the community engagement and cultural aspects. It is not expected that your evaluation will be comprehensive, but hopefully this guide will enable you to pick those elements which are important to your schemes or projects and to describe how they were successful and what you learned.

1.1 What the guidance includes

It is in four parts:

1. A general introduction to evaluation and its design (section 2)
2. Top tips on data collection (section 3)
3. Approach to analysis and reporting (section 4)
4. A toolbox including a question bank (provided in a separate excel document), survey templates, a wide range of data collection approaches and useful resources (sections 5 and 6)

Each section is accompanied by links to further resources.

Use it as you need it:

- If you are new to evaluation then start with section 2

- If you have a good idea of what you need to do, then start by designing your own logic model or evaluation framework refer to section 2.3 and 2.6
- If you are on your way and looking for inspiration for your data collection go to section 3
- For specific survey or qualitative questions go to the toolbox and sections 5.1 and 5.2
- If you are looking for inspiration about how to do qualitative, observational or creative evaluation use section 5.3
- For guidance on the technicalities of research and data collection have a look at the end of the toolbox in section 6

1.2 Useful Definitions

- **Audiences:** Those who attend events – whether digital or physical
- **Participants:** A range of people who are involved through engagement activity either at events or workshops or through helping to develop or co-create programmes, including volunteers
- **Evaluation:** About assessing whether your activity achieved its intended aims and objectives
- **Monitoring:** Monitoring is about regularly measuring tangible aspects of your activities, including numbers and demographics, such as age, gender and ethnicity
- **Quantitative data:** Usually collected through closed, rated or tick box questions which obtain numbers and proportions of people that fit set criteria e.g. 35% of visitors are aged 29 – 34, or 70% of participants rate their experience as very good
- **Qualitative data:** Collected by asking open questions, probing or seeking comments to obtain richer information about beliefs, motivations and attitudes e.g. our museum is perceived as cold and unfriendly
- **Outcome:** The changes that those taking part in a planned activity experience as a result of their participation; these could be learning or social outcomes
- **Indicator:** What is indicative of the change, what will you be looking for to have happened or changed for your participants?
- **Measure:** Can you quantify or define the change in a way that people will find easy to answer – typically numbers or

percentage of people or level of agreement with a statement or rating of an activity (data usually collected using surveys) OR are you looking for participants to define this using your indicator as a starting point (data usually collected through e.g. discussions or interviews)?

- **Methodologies:** The way in which you collect evaluation data. Methods could include, but are not limited to surveys, interviews, discussions, observations and creative approaches. Monitoring online engagement analytics and/or posts and comments is also an increasingly important way to collect feedback from participants.
- **Formative and summative data collection**
  Formative: Conducted during the project, to improve the project and its outputs; Lets you reflect on what you've done so far, what's going well/not; Identifies what you could do to change or improve work in progress.
  Summative: Conducted towards the end of the project; Provides evidence of achievements and success.

For more definitions try this resource: Evaluation Flash Cards https://ottobremer.org/news_stories/evaluation-flash-cards/

2. Introduction to Evaluation design

Your evaluation will help you deliver your project and plan for future activity by:

- Reporting on what happened, who benefited and how, what worked and what didn't,
- Providing evidence for advocacy, so that you can influence your funders, supporters and partners
- Informing your planning, so that you can put what you have learned into practice on an ongoing basis.

The best approach for evaluating you project will depend on a number of factors:

- What you set out to achieve
- The nature of your activity,
- The nature of your audience/participants/stakeholders etc.
- What is most important to measure or report on
- The resource you have available for evaluation

There's no single 'best' approach to take, so always start with your aims and outcomes – don't start by saying "We need to do a survey" or "We need to do focus groups" – these may or may not be the best way of gathering useful data.

Your evaluation will therefore be more useful if you design it and this section gives you some hints and tips to think about the process of deciding what you want to evaluate and how to plan it. If you do this logically you will not waste resources on questions that you cannot answer within the lifetime of your project or which will take too much time and resource to answer. It is also not necessary to evaluate all aspects of your project, so focus on activities that typify the overall ambition and/or you would like to focus on because they are new or different. You may therefore focus on a particular event, a specific group of participants or a series of workshops or programme of activity.

An integral part of evaluation is the documentation of your activity and monitoring of who engaged. Effective evaluation requires a full record of everything that happened – what, when, where and how many times; the opportunities for stakeholder, audience, participant etc. involvement; the number and type or profile of participants or audiences. This information is also required for your High Street HAZ Scheme Plans and regular reporting to Historic England.

Once you have designed your evaluation, consider what baseline data you might need to collect which will enable you to describe what has changed as a result of your scheme or project.

The next section has some useful definitions and a step-by-step approach to developing and delivering your evaluation.

It is useful to think about how you will report on your evaluation and who to at the beginning of the process. Do you need to produce different reports for different stakeholders? Which stakeholders are more likely to engage with facts and figures and which with stories? Aside from a standard written report, would it also be useful to report using a presentation, video, infographics or case studies?

For more about designing your evaluation try these resources:

5 Top Tips for successful evaluation planning: https://www.theaudienceagency.org/resources/top-tips-for-successful-evaluation-planning

Core concepts in developing monitoring and evaluation frameworks: https://www.betterevaluation.org/sites/default/files/ME%20Framework%20Resource%20Guide%20Jan%202014doc.pdf

How to carry out an evaluation of your National Lottery-funded projects: https://www.hlf.org.uk/evaluation-guidance

A guide to evaluating arts education projects: http://www.culturehive.co.uk/resources/a-guide-to-evaluating-arts-education-projects/

Public Art and Building Schools for the Future (BSF): Review and Guidance: http://ixia-info.com/research/evaluation/

National Co-ordinating Centre for Public Engagement's evaluation resources: https://www.publicengagement.ac.uk/plan-it/evaluation/evaluation-resources

Evaluation toolkit for museum practitioners: http://visitors.org.uk/wp-content/uploads/2014/08/ShareSE_Evaltoolkit.pdf

Good Growth Food: Evaluation and Impact Handbook: https://www.london.gov.uk/sites/default/files/goodgrowthfundevaluationandimpacthandbook_0.pdf

Evaluation in participatory arts programmes, Creative People and Places: https://www.culturehive.co.uk/wp-content/uploads/2017/08/Evaluation_in_participatory_arts_programmes.pdf

AHRC's guide to self-evaluation: https://ahrc.ukri.org/documents/guides/understanding-your-project-a-guide-to-self-evaluation/

Evaluation of volunteering:
https://www.heritagefund.org.uk/sites/default/files/media/research/social_impact_volunteering_2011.pdf

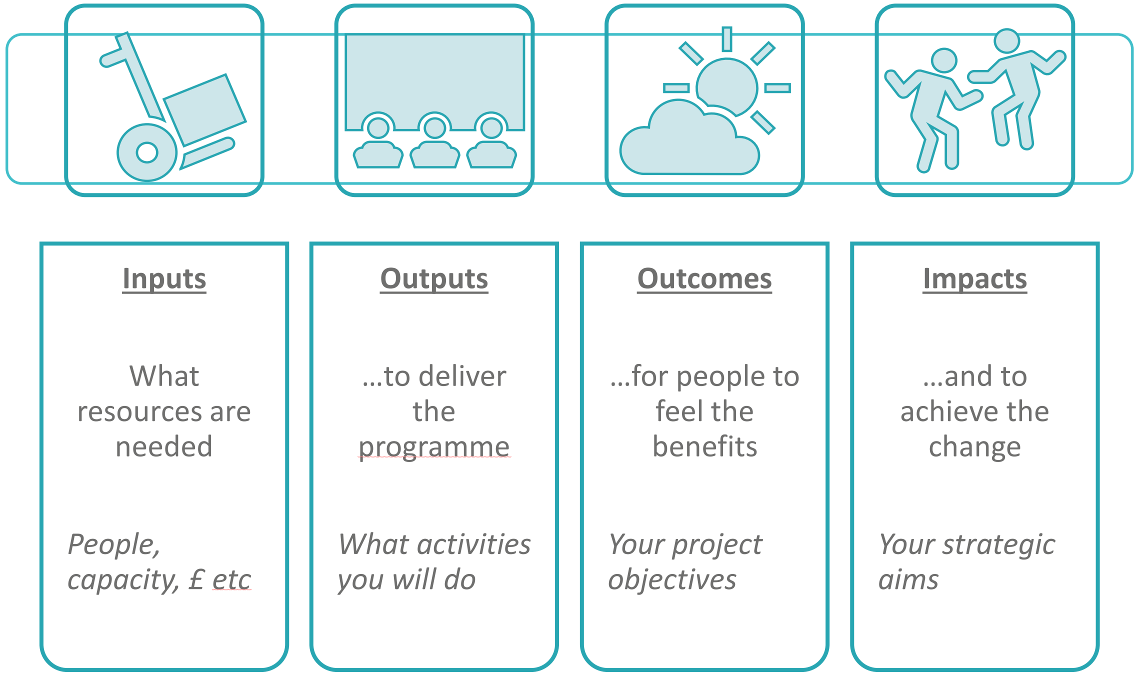
2.2 Evaluation proces

Outline	Outline what you want to achieve and what you are going to do
Frame the change	Decide how you will know you have achieved your objectives, what difference you will you make, what outcomes and impacts you would like to have?
Measure the change	Convert these outcomes into measurable indicators and consider what you can you ask to assess whether change has happened?
Research	Collect data / research with your participants, audiences and stakeholders
Report	Analyse and report the change / journey and identify your learnings etc

2.3 Getting going - logic models

Historic England has taken a logic model approach for the Programme design and evaluation. This is a good tool to use for designing evaluation as it describes a logical chain connecting the work you are doing and the desired immediate outcomes and impacts. Using this took you will be able to generate a plan to be able to assess whether you achieved the aims of your project or programme. Logic models outline or define the focus of evaluation – i.e. the ‘outcomes’ and help to identify indicators you may use to evidence change.

The HS HAZ overall Programme logic models and those for the community engagement and cultural programmes are included in the accompanying document on evaluation (File: “HE HSHAZ. Evaluation Framework”).



Assessing if outcomes have been achieved, and how, will enable you to understand how the different strands of the Programme are meeting the aims.

To find out more about logic models try these resources:

https://www.gov.uk/government/publications/evaluation-in-health-and-well-being-overview/introduction-to-logic-models

https://www.betterevaluation.org/

https://www.wkkf.org/resource-directory/resources/2004/01/logic-model-development-guide

https://diytoolkit.org/tools/theory-of-change/

2.4 Timing and context

You will usually plan your evaluation **before your project activity begins**.

As part of your planning you should consider **when you need to start** collecting data, where and who from. This gives you the opportunity to embed evaluation into your project, which can make it easier to collect the necessary data.

Consider what **contact points** will you have with your participants/audience members. It is usually easiest to build data collection into these contact points. For example, if you need to know where your participants live, ask them this when they sign up rather than asking as a standalone question later on in the project. Or, you might want to make your event ticketed in order to collect contact details, so you can interview audience members afterwards (you can integrate questions into the ticketing system or any other sign-up process whether using Google or Microsoft forms or a 3rd party service such as Eventbrite or Brown Paper Tickets - just ensure you are complying with GDPR – see section 6.5). Or you might need to set up your website analytics /Google Analytics in a particular way to measure usage of a specific part of your website. Alternatively, would it be beneficial to be able to track participants' progress? If so, it might make sense to ask them some questions at the start of their participation, during, and at the end of the project.

There may be some questions which require **context** to answer, or time to reflect on. If you want to understand what impact participation has had on peoples' employability (for example), they may not really know until months after the project has ended. You may however be able to ask them to what extent they think participation has increased their skills or likelihood of new skills being useful for their current or future job.

2.5 A note on baseline data

If you would like to track the change or the impacts which your scheme or project has, it is useful to consider whether you should collect baseline data. Baseline data is essentially the 'before picture' and could include tracking, for instance, a change in the profile or demographics of those who engage with culture or participate in projects; increased use of the high street; increased levels of skills or confidence; changes in perceptions of the high street or culture in a community.

This data can be collected either using quantitative or qualitative methods. Or there are existing data-sets which may be useful – such as population data or local resident surveys where they exist.

What you collect may depend on what you would like to evaluate. Ideally this should be collected in advance of the start of a project, but you can also track how e.g. perceptions change from feedback from participants by comparing responses at the beginning to those gathered at the end of your project.

For more information on population statistic refer to the office for national statistics, https://census.gov.uk/, or refer to your local authority which may have its own online 'atlas' of local demographic statistics.

2.6 The importance of monitoring and documentation

Audience or participant monitoring is about recording how many people engage and the profile of those engaged.

The question bank provides the standard categories for demographics and protected characteristics – age, sex, gender/identity, ethnicity, and disability. These can be used in the context of national benchmarks from the Census.

If it is not appropriate to ask these questions of all participants or logistically it is difficult to capture from audiences, then describing who you are engaging in terms of why you are working with a group, where they live and what the profile of the surrounding population is.

In order to evaluate effectively, it is also important to fully document your activity – how many sessions/workshops/participative opportunities, the nature of events or activities, the timing, duration and location of activity etc.

2.7 Reporting to other funders

If your scheme or project is supported or funded by an organisation, other than Historic England, ensure that you check their reporting and evaluation requirements and integrate the necessary outcomes, indicators, measures or metrics into your evaluation plans.

2.8 Inclusion

As well as working in line with the Equality Act of the UK, your scheme or project should take positive steps to ensure it demonstrates a commitment to equality, diversity and inclusion principles. Historic England have published a strategy for inclusion, diversity and inclusion: https://historicengland.org.uk/content/docs/about/strategy-ide-nov20-mar23/

Digital inclusion standards: https://www.musedcn.org.uk/2020/05/11/digital-inclusion-standards/

Government guide to making your service accessible: https://www.gov.uk/service-manual/helping-people-to-use-your-service/making-your-service-accessible-an-introduction

Consider inclusion and representation: https://www.gcfoundation.co.uk/represent

2.9 Resourcing and budgeting

When considering the resources necessary to deliver evaluation the following areas should be taken into consideration:

- Deciding on the scale and scope of your evaluation and the method of data collection
- Designating a member of the team to oversee the evaluation and ensuring they have allocated time
- Coordination and administration of the evaluation delivery, including set up of questionnaires, interview and discussion guides or recruiting participants to interview, recruitment of fieldworkers or training volunteers to collect data, timetabling and overseeing evaluation at events or sending out e-surveys in collaboration with others
- Inputting results, checking data quantity and quality
- Data analysis – producing topline results, analysis of open comments, transcribing audio or comment walls, editing video or sorting and crediting photographs
- Reporting.

2.10 Your evaluation plan

Your evaluation plan should look something like this

Evaluation question / outcome / objectives	Measure / metric or question prompt	who to ask	Method of data collection	Timing of data collection

This will be accompanied by a set of tools – questionnaires, topic guides, equipment such as camera/recording devise or other materials for facilitating the evaluation.

3. Top tips on data collection

This section looks at some approaches you might take, and explains some of the detail behind each, as well as things which may or may not make them suitable for you.

3.1 Qualitative vs. Quantitative data

Qualitative research produces data which is generally non-numerical and helps understanding of the why and the how. Typical qualitative techniques include interviews, focus groups, or participant observation. Qualitative data may also be gathered via typically quantitative methods, such as open-ended questions on an e-survey (things like "Is there anything else you'd like to tell us about your experience?").

It should be noted that qualitative methods should be structured and planned so that you are clear what you are asking about and more importantly not collecting data that is not relevant to your evaluation. The approach should be replicable in that you ask the same set of questions where in a series of one to one interviews or group discussions.

The main advantages of qualitative approaches are:

- Depth - you can ask why respondents answered in a certain way e.g. why they have engaged, or why they found it difficult to engage
- Probing - you can ask for more information if the respondent/s gives short answers
- Openness - you will usually have more flexibility to receive unexpected answers (as opposed to pre-coding answer choices)
- Flexibility of analysis - how you analyse and report on your data can be influenced by the data itself
- Flexibility of approach - it is possible to select methods and language which suit the research respondents best, which may be useful for including a range of types of people or communities within the evaluation
- Accessible - qualitative research can feel less formal, and therefore easier to engage with by research respondents - it can feel like a conversation rather than an interview. Less formal, verbal or visual methods may also prove more accessible and inclusive for some research respondents.

However, qualitative approaches have some downsides:

- Difficult to quantify - if you need to express results in terms of numbers and percentages, you may not be able to

- Expertise – without sufficient training, it can be difficult to keep conversations on topic, ensure everyone's voice is heard, and conduct the research in an unbiased way
- Representativeness – you may only speak to a small number of people; are they really representative of all your participants/audience members?
- Time commitment – you will probably need to spend more time collecting qualitative data than you would quantitative data. For example, an e-survey can collect data from hundreds of people at the same time, whereas 100 in-depth interviews might take weeks to complete.

Quantitative research produces data which can be represented numerically – measuring the how much or how many. It typically uses methods such as questionnaires, e-surveys and polls and includes digital analytics data on engagement. Quantitative research has some distinct advantages:

- Quantifiability – you can see the *extent* to which outcomes are met
- Repeatability – you can use the same questions or e-surveys multiple times, to track changes or to understand different groups of people.
- Comparability – you can compare your results with e.g. national statistics (if you use the same methodology)
- Generalisability – by being able to reach and survey more people, it is possible to gain a better understanding of whether the results reflect the wider audience or population, something that is harder to do with qualitative methods.
- Ease of analysis – you can use common tools like Excel to understand your data, and most online survey platforms produce analysis for you

The downsides of quantitative approaches include:

- Sample size – you need to achieve a large enough sample size to be able to talk about your results with any degree of confidence (see below)
- Time consuming – certain methods, such as face-to-face interviews, can take a long time, especially if you need a large sample size, and or have low usage levels (for example an e-survey on a website which only has ten visitors a day may take many months to gather a large enough sample size)
- Static – the majority of your questions will probably be pre-coded i.e. consist of a question followed by a number of options. Given you have to decide on the options before the survey launches, you may miss some unexpected responses

- Less ‘creative’ – qualitative approaches tend to be better at getting respondents to think creatively about their answers. This can be especially useful when talking about experiences and impacts.
- Language – if offered in multiple languages, care must be taken ensure the meaning of questions is consistently translated

Digital metrics describe engagement with online content – whether through a website or social media platform and will usually also be quantitative in nature. This might include views, dwell time, unique users, numbers of people who have watched a livestream or downloaded a podcast. Digital metrics may also be a good way of measuring who your project reaches, and how they engage with it. However, although most platforms will give you some analytics or data about your users, they vary in terms of what they tell you, how they provide it to you, whether the data includes all ‘engagers’ and the extent to which you need to set up your metrics in advance.

You can read more about using digital metrics in this document in section 3.6.

If you want more inspiration on data collection try these resources https://www.userzoom.com/user-experience-research/quantitative-and-qualitative-user-research-methods-complete-guide/

https://www.history.org.uk/secondary/resource/2886/research-methods-in-heritage-museums-galleries

Top Tips for Survey Data Collection, The Audience Agency
https://www.theaudienceagency.org/blog/top-tips-survey-data-collection

Survey Methodology, The Audience Agency
https://www.theaudienceagency.org/survey-methodology

3.2 Top tips on quantitative data collection

3.2.1 Surveys: sampling and representativeness

In technical terms, surveys can either be a **census** or a **sample**. A census aims to gather information from every person in the population (In research, ‘Population’ means ‘everybody we want the research to describe’ – i.e. all audience members/participants etc), whereas a sample aims to speak to enough people in the population to be relatively confident that the people you spoke to are representative of the entire group.

You may be able to conduct a census if you’re dealing with a relatively small number of people, especially if you have prolonged contact with them – for example, volunteers in a skills development activity or participants in a workshop. However, we usually use samples for describing audiences, as it is rare that it is possible to speak to every audience member, and we can get good enough results by taking a sample instead.

When speaking to a sample, the two key concepts are sample size and representativeness:

3.2.2 Size

Sample size determines the **margin of error** you'll end up seeing in your results – i.e. how likely it is that if you ran the survey again with a different selection of people in the population you'd see the same results, or to what extent there's noise in your data.

The more people you speak to, the more confident you can be that the results reflect what everybody would have said, if you had spoken to everybody. Technically, this measure is called the confidence interval, and it can be expressed as the margin of error you see in results. We typically aim for a confidence interval of 5%, which means that the results are within 5% of what we would see if we had taken a census.

The number of people you need to speak to reach this confidence interval depends on the size of your population; you can use an online sample size calculator to provide this figure. But broadly speaking, assuming a large audience (and it is a bit more complicated than this):

- Sample size of c. 100 = ± 10% margin of error in results
- Sample size of c. 400 = ± 5% margin of error
- Sample size of c. 2,500 = ± 2% margin of error

So the more people you speak to, the more sure you can be of your findings.

If you want to **compare** different parts of your population, you will need a robust sample size of each group you want to compare. For instance, if you wanted to compare the experience of under-35s and those aged 35 or older, you would need to achieve a larger overall sample than if you were just interested in peoples' experiences overall.

It's worth noting that the relationship between population size and sample size **isn't linear** – if you have an audience of 100 people you would need a sample size of 80 to reach a confidence interval of 5%, whereas if you have an audience of 10,000 you would need to speak to 370 people for the same confidence interval. This may impact which methodology you choose – if you need a small confidence interval/margin of error, and you would need to speak to 80% of your audience to achieve it, does this seem possible? If not, you may need to either adjust your expectations, or conduct your research in such a way that you will be able to gather information from this may people.

Alternatively, you may need to recognise that your outputs will be better presented qualitatively, where your findings can go into more depth about individuals' experiences, but perhaps cover less breadth of experience.

But regardless of sample size, achieving a representative sample is even more important.

If you want to know more about sample sizes try this resource (which also includes links to online sample size calculators):

https://www.theaudienceagency.org/resources/guide-good-practice-guide-to-sampling

3.2.3 Representativeness

The sample should reflect the population, so it's important that the people you speak to are randomly drawn from your entire audience. Lots of factors can bias your sample towards or away from different types of people, so consider:

- Including the whole programme, not just certain performances
- Seasonality/timing – your audience may change during your project, or depending on the day of the week or time of day – so select a range to be representative of the whole
- The method used – think about how you are collecting data and the impact that may have on who responds - delivering a survey face to face or digitally may engage different types of people, the language you use may 'exclude' some people and others may not want to make the time to respond to you whether a survey or interview
- Digital exclusion – check whether any of those you would like to involve in the research will be unable to take part because of poor/no internet access, high data costs of using the internet, lack of the right devise, lack of skills or confidence? And consider alternative approaches to support them to be involved, such as a phone interview orusing a paper survey at events or activities

3.2.4 Administering a survey

Exactly how you administer a questionnaire will depend on lots of different factors, including who you're researching, the method (face to face interviews, e-survey etc), the platforms you're using, time and technological constraints. Some common considerations are:

- Make sure you're abiding by all relevant data protection legislation. (See section 6.5).
- Give respondents clear instructions – what do you want them to do, and when?

- Include an introduction explaining the purpose, how the information will be used, and approximately how long it will take to complete the survey.
- If conducting face to face interviews, give the interview clear instructions – who should they speak to, and when? Are there any practical considerations they need to be aware of, such as where to conduct the interview?
- You may want to incentivise participation in the research. This can be a good way of encouraging an unbiased sample; without an incentive you may only hear from people with particularly strong opinions, or those who feel particularly strong ownership over the programme.
- If you do use an incentive, make sure it's neutral and isn't directly connected to your organisation. Otherwise, this could be seen as promotion or marketing, which opens up wider data protection considerations, and it might not incentivise people who have had a bad experience of your organisation. We tend to recommend prize draw entry, with the prize being something like a shopping voucher.
- Refer to local rules and regulations around prize draws; you will usually have to provide a closing data, say who will conduct the draw, and how the winner will be informed.

3.2.5 Creating a questionnaire

Although this guidance includes a question bank, you may be designing evaluation questionnaire which include additional questions, so some general guidance has been included.

The basics

Regardless of the delivery mode, there are some fundamentals to be aware of when creating a questionnaire. In this context, 'Questionnaire' refers to a set of questions which are asked in a consistent manner to a sample of a population, and are designed to gather largely quantitative data.

- Start from your **objectives**. Think about the indicators and measures you have in your framework. Design your questions - the questions in the question bank are informed by the Programme evaluation outcomes
- Consider the **user experience**. Are you using terminology they will understand? Is it clear what each question is asking? If you need to and time allows you can test out your questions or use questions from the question bank or other tried and tested sources
- Ensure the questions are **neutral** and not leading i.e. do not suggest what you would like them to say within the question or give them no option to disagree or not have an

opinion. For example "How good was your visit?" may be leading, whereas "How would you rate your visit?" is neutral.

- Be **concise -** only ask questions you can and will use. Be strict about what you 'need to know' vs. what would be 'nice to know'

Question types

Broadly speaking, questions are either coded (i.e. are responded to by ticking one or more boxes) or literal (responded to by writing something into a box).

Coded questions

These can either be single or multiple response – i.e. where only one box can be ticked, or multiple boxes can be ticked. For multiple response questions, mention that multiple options can be ticked, otherwise respondents may tick the first option that applies to them and not read any further down the list.

- You may ask a series of questions in a **grid** – for example if you want to ask the respondent to rate a number of different elements of their experience (informed by the evaluation outcomes Try to keep these questions down to four or five rows, otherwise they can be overwhelming and people may not give enough consideration to each row.
- Any use of scales should be **balanced**. For example a rating scale should have the same number of 'positive' codes as 'negative' codes, and they should be of the same strength.
- Always be able to tick (at least) one box.
- Many online survey platforms let you set **exclusive answer codes** within multiple responses questions. Ticking these codes will untick all the others in that question, which helps keep your data clean by making contradictory responses less likely.

Our favourite online survey tools include Survey Monkey, Microsoft Forms, Google Forms or occasionally we'll deliver a poll on Zoom or Mentimeter to collect data in real-time during a virtual event.

Literal questions

These fall into a few main categories: formatted response, open response, and follow-ons.

- **Formatted** response questions are things like country, quantity, price etc – you have to write in an answer, but in a predetermined format. For these questions, be clear about what format you require (e.g. whole numbers, ranges or percentages). You can use design to encourage people to use the correct format. For example, only provide a small box if you only want a single number as a response.

- Be clear about what you're asking. "Where do you live?" could mean which country, region or town, so specify which would be most useful to you based on how you will analyse the data. If you want to know city and country, as these as separate questions, to save having to separate response before analysis.
- If you're building an e-survey, you may be able to specify the format of responses.
- **Open** response questions should be specific enough that you can analyse the results relatively easily – if you want to know about something in particular, make this clear (e.g. "What, if anything, did you like or dislike about XXXX?" will probably be more effective than "Is there anything else you'd like to tell us about the platform?")
- Allow enough space for responses and use the size of the box to hint at how much depth you want
- **Follow-ons** are questions which relate directly to a previous coded (tick-box) question. For example, you may have used an 'Other' category, in which case you might want to then ask e.g. "How else did you hear about the project?". This means you don't have to anticipate and list every possible response, and you can pick up unexpected outcomes.
- You can also use follow-ons to collect qualitative data, to give more depth or context to coded questions. For example, if someone said the platform was 'Very easy' or 'Very difficult' to use in a coded question, you might then ask "Was there anything in particular which mad the platform easy or difficult to use?"

Design considerations

Most online survey platforms make the process of building a questionnaire quite straightforward, and will automatically optimise things like how questions look, or how many are presented on a page. However, there are some considerations which you should bear in mind regardless of whether you're designing an e-survey, paper questionnaire, or another type of quantitative data collection tool.

- **Flow** of questions – lead the respondent through the questions in a logical way. You may want to approach the flow thematically – i.e. asking all questions about a particular theme one after another – or chronologically (e.g. "Before you started the project…", "Your experiences of the project", and finally "Impacts of the project")

- Use **routing and masking** as appropriate, either by including instructions for the interviewer or respondent, or using the functionality provided by your survey platform.
    - **Routing** (aka piping or skip logic) means questions are asked dependent on responses to previous questions. For example, a question about the age of those in your group may only be asked if the respondent already said they took part in your workshop with members of their family. Routing can also be used to skip entire sections.
    - **Masking** refers to the process of only showing relevant answer codes, dependent on responses to a previous question. For example, the question "Why did you want to join this workshop?" might be multiple response, followed by a single response question "Which was your main reason?". Masking the single response question so it only shows those options ticked in the multiple response question will improve the cleanliness of your data, and make for a smoother user experience
- Some survey platforms all **dynamic text** to be used in questions or answer codes. This can be useful for referring back to previous answers ("You gave the event a score of 7/10. Why did you give it this score?") or making questions clearer ("What did you think of the workshop" if the respondent attended on their own, or "What did your family think of the workshop?" if they visited in a family group).
- You may be able to set questions as 'must answer' – i.e. the interview will not continue if the respondent doesn't answer a certain question. Respondents will generally answer all questions without you forcing them to do so, so we would recommend only questions which are fundamental to the progression of the survey are set as 'must answer'. For example those which determine whether or not a subsequent section of the questionnaire is skipped may be set as must answer, as the alternative would be the respondent only answering the first few questions and then skipping to the end. Likewise, if the respondent comes across a question they don't feel they can answer and there isn't a 'Don't know' option, then they may abandon the survey if it's set as 'must answer'.

- Before launching a survey, **test it** with some people who are less familiar with it. They may identify issues with wording, flow, clarity, or useability which you hadn't noticed

3.2.6 Face-to-face surveying

Interviewer-led questionnaire completion on paper or tablet

Suitable for all audience age ranges and types, although may be accessibility or language issues

Pros:

- Gives good quality data
- More likely to achieve a representative sample
- Can calculate the accuracy of findings using standard statistical tests
- Can provide staff/volunteers with useful transferable skills
- Open questions can be included for short responses

Cons:

- Larger numbers of responses required to be statistically valid
- Can be costly if fieldworkers to collect data need to be paid
- Interviews at events get reactions of the moment without time for reflection
- Not appropriate for events with a small window of collection time, at night or where no physical space for interviews to take place
- Limited probing is possible as to why participants answered as they did

Recommendations

- Surveys are as short as possible i.e. 2 sides of A4 maximum
- A suitable approach to achieving a representative sample is used (see below)
- If longer surveys are required prepare an area with seating where audiences can be invited to and refreshments provided
- Completion of questionnaires on tablet may take longer than on paper, therefore tablets only to be used where there is a slower flow of people or larger time windows for collection

3.2.7 Deploying e-surveys

E-surveys can be shared in a number of ways, determined by the activity you're evaluating and the population you're looking to describe.

Regardless of how you distribute your questionnaire, you probably want to ask a question to determine that the respondent is in your population – did they see the exhibition, take part in the workshop, view the film etc? This is particularly the case when inviting a wide pool of people to complete the survey, e.g. if sharing via social media.

Email invite

Send a standalone email inviting recipients to take part in the survey. You could send this to your entire mailing list, or (preferably) to people whose email addresses you've collected for this specific purpose. If people know they will be sent an invite, they're more likely to respond to it.

- **Pros**: Best response rate, especially when respondents gave their email address for this purpose or explicitly agreed to be contacted with a survey. Can be very targeted e.g. only sent to people who signed up for a workshop. Can recontact people who don't respond to the initial email.
- **Cons:** You need to have collected email address at some point, with the appropriate permissions.

Email piggyback

Include an invite to take part in the survey within an existing newsletter or other scheduled communication.

- **Pros**: Low effort, and may reach lots of people (depending on the size of your list)
- **Cons:** Your list may not be representative of the population you're trying to reach. Open rates may be low without a call to action in the subject line. The survey may be overlooked amongst all the other content in the email.

Pop-up on your website

Create a pop-up window which contains an invitation to the survey, and a link to the survey (which would open in another window). Consider the design of the window - make sure it's branded so users do not mistake it for advertising and automatically close it. Additionally, consider the timing of the pop up and its placement on your website. Depending on your CMS, you may be able to set this up to only appear based on certain conditions (e.g. on a first visit to the website, or on a certain subdomain, after a certain amount of time, or on leaving the site)

- **Pros**: Pop-up windows can be effective at attracting attention from users, and create one focused call to action. You can simplify the design by creating a new web page within your website as re-direct landing page from the pop-up link to your survey, which will enable you to include more introductory information.

- **Cons:** The appropriate levels of software, skills or time may not be available. Pop-ups can be mistaken for advertising or cookies notifications, so need to be designed carefully to be distinguishable. Users may have pop-ups blocked in their browsers.

Banner on your website

A banner can contain an invitation to the survey and the survey link. Similar to the pop-up window, it's important to think about the design and placement.

- **Pros**: Less intrusive than pop-up windows but can be effective at bringing attention to your survey, which means you will likely attract a good sample size. Banners are not affected by browser pop-up blockers.
- **Cons**: The appropriate levels of software, skills or time may not be available. Banners can be more easily missed than pop-ups.

On-page text

Place the survey link and some explanatory text on relevant pages of your website.

- **Pros:** It is the least technical and often quickest option for deployment.
- **Cons:** May yield a low response rate, particularly if it is embedded within a limited number of pages, or is embedded on pages with lots of text or content. May interfere with the layout/design of the existing pages, particularly once the introductory text is included.

Link via Social media

Place a short call to action and a link to the e-survey in a tweet, post, note, comment etc.

- **Pros**: Quick and easy, and you can often measure its reach for an early indication of whether it is reaching enough people. Some platforms allow you to promote posts
- **Cons**: May yield a low response, depending on levels of engagement with your social media. Relatively unfocussed targeting, so will require screening questions. Sample may be biased and not represent your whole audience as it is only those on social media and only those who are already engaged with your content or feed.

3.3 Top tips on qualitative data collection

Small Group Discussions/ Discussion forum/ Focus groups

Interviews and discussion groups are two core in-depth activities in evaluation. Both can take many different forms depending on the nature of the project, and what information needs to be uncovered about participants' experiences. However, the following guidance can apply in most circumstances.

General guidance for interviews and discussion groups

- Write a set of open-ended questions ahead of time, which can be supplemented by ad-hoc prompts during the discussion.
- Questions should be linked to the specific project outcomes as detailed in the evaluation framework.
- Take notes or record answers using audio or video capture. Consider your analysis time and resources when choosing a method to capture responses. It can be useful to audio record and listen back for key themes, if time or resources are unavailable for transcription. If an extra staff member is available, it may be quicker for them to jot down key points during the interview itself. Audio and video recordings can bring reporting to life – subject to consent from participants.
- Always begin by explaining the purpose, how the information will be used, and approximately how long it will take.
- Keep questions and prompts as open-ended as possible to avoid 'leading' the participant to a certain answer (e.g. ask 'what did you like about the project and why?' instead of 'why was the project so amazing?').
- It can be useful to start with a very open question such as 'how was your experience?' to give an unprompted response.
- Include at least one question that will actively prompt constructive feedback, such as 'what are you least looking forward to?', 'what is one thing you would change about this project?', or 'what was a challenge you encountered?'.
- Keep questions to the minimum necessary to get the data you need for your evaluation to reduce 'interview fatigue'. 10 or fewer questions is often better for young people.
- You may need to rephrase or prompt further to get enough insight into the participant's experiences.

- It is very useful to add a 'any other comments?' question at the end, to capture any additional thoughts not covered in the set questions.
- Don't assume what a participant means – ask them if something is unclear or paraphrase their answer back to them to check.
- Avoid interrupting or interjecting over participants – it might cut short some valuable reflection and feedback.
- Never directly quote a participant by name in a report unless they have given you consent. If you want to 'label' your participants according to their characteristics in your report e.g. age range, job role, participant, volunteer, audience member, local resident, ensure that you get consent from your research respondents.

Interview-specific guidance

- Conducted one-on-one in person, or on the phone – ideally in a space where the participant feels comfortable speaking openly.
- Interviews can also be done peer-to-peer between participants, but keep in mind that you may need to provide additional training and support for this.

Discussion group-specific guidance

- Generally aiming for no more than 8 people per group, with a discussion for no longer than about an hour to 90 minutes, and working within a set of questions/topics to keep the conversations on track. This method allows much more freedom in what information can be collected, and allows for more generation of ideas, but can be difficult to manage if there are strong characters in the group.

Pros:

- Intimate and engaging for participants
- Enables you to talk to smaller, sub-groups e.g. those with particular needs and a particular age range or about specific issues i.e. access
- Flexible, adaptable format
- Freedom to explore interesting and unexpected
- Gives potential to build trust between participants
- Can provide very interesting data particularly if you repeat the process
- Opportunity to put next step questions back to the participants – how should we change this? If we did X what do you think the outcome would be?
- Can be route to establishing a committed core of participants who want to be more involved

- Value for money – can get a lot of direct feedback for cost of room/refreshment hire etc

Cons:

- Needs careful planning and facilitating to motivate group
- Needs skilled facilitator
- People might not all contribute equally
- Can become unhelpful if allowed to be just a talking shop/space for moaning
- Could seem formal
- Requires commitment to action – ie. If there is negative feedback you are going to have to be prepared to act on it
- Small sample, so not a wide insight into your audience.

For more methods for qualitative data collection check out this resource:

Ethnographic: https://discovery.ucl.ac.uk/id/eprint/10054434/

3.4 Top tips on Creative and observational tools for evaluation

Creative approaches can include transforming a more traditional method of data collection into something more creative, such as a feedback form with an unusual design or question set; or eliciting creative responses from participants about a project, such as feedback in the form of a poem.

Creative forms of evaluation can offer solutions to some key challenges to evaluation. Advantages to creative approaches include:

- Audience and participant approaches are embedded in the project process or outputs
- Authentic
- New, fresh, real community and audience perspectives and voices
- Engages stakeholder with reporting
- Supports advocacy

Creative approaches can be much more accessible to participants who have additional access needs. They are useful for embedding evaluation into a project and can lead to higher response rates. They can capture participants' emotions, perceptions, and attitudes. Even though these approaches are non-traditional, they should still be rigorous and founded on measuring project aims.

When using creative approaches, it is important to incorporate the same good practices you would for any other evaluation method. This includes:

- Having clear objectives
- Knowing why you are evaluating
- Evaluating what you value, not valuing what you evaluate

- Avoiding overly-complex methods
- Considering a mix of quantitative and qualitative data when you bring together the responses in analysis and reporting
- Thinking about the physical environment for the evaluation.

The drawbacks of creative approaches are that they produce data which takes longer to analyse, and they often need to be used in combination with other methods to capture a complete picture. Be wary of choosing creative approaches for their own sake – they should be used because they are the most useful method for your project. As with all other forms of evaluation, it's important to choose 'the best tool for the job'.

If you want to explore these options further try these resources: https://www.theaudienceagency.org/resources/getting-creative-with-evaluation

Here are also some top tips for successful evaluation of participatory work:

https://www.theaudienceagency.org/resources/top-tips-for-successful-evaluation-planning

3.5 Decision guide for light touch creative, observational and qualitative tools

What is the best tool?

- **For one off events or activities**
  - I'm looking for a tool to use at a large event or public space
    - *A short quantitative audience monitoring survey - face to face at event or post-event e-survey*
    - Quick visual responses, Mini ethnography (and other observational tools), *Tools D, E, F, G, K (in the Toolbox)*
  - I'm looking to something to capture quick feedback in smaller event or workshop
    - Quick visual responses, Five Finger Feedback; Learnt it, Felt it, Love it, Word Association, *Tools G, H, I, L (in the Toolbox)*
- **For longer term projects**
  - I've got more time to do some evaluation with participants or I have resources for an external evaluator
    - ***A quantitative survey for participants - post activity***
    - **Journey mapping, Mini Most Significant Change** ***Tools M, N*** *(in the Toolbox)*
  - I want a tool that works well with younger people and those who have English as an additional language
    - Visual stories, Journey mapping, observational tools & more *Tools D, E, F, G, H, J, M, N (in the Toolbox)*
- **For activities where feedback from facilitators or artists is useful**
  - I want a tool that provides a structured way of capturing anedotal feedback from audiences and staff/facilitaor observations
    - ***Post session feedback tool*** ***Tool C*** *(in the Toolbox)*

3.6 Guidance on digital evaluation

Some people use the term digital evaluation as a catch all to mean many things. It may be about delivering evaluation data collection methods in an online format – such as focus groups and creative discussions via Zoom, or telephone interview via Teams. It may be about sending out a survey or questionnaire as an online version (see section 3.2.8 on deploying surveys online). It can also be about the use of digital tools to support creative evaluation methods – such as online collaboration tools like Miro https://miro.com/ and Jamboard https://jamboard.google.com/, or digital journey mapping apps.

Organisations may also use digital tools such as 'Meltwater' to track their media or digital impacts.

Digital evaluation can also refer to website and social media analytics. This section of the guidance provides an overview of some of the analytics you might want to collect to support your evaluation of any public facing activities. It is not possible for us to provide a definitive list of metrics to collect, instead you should consider which are the most relevant for your specific project.

Digital platforms

The following is a list of useful metrics from a range of popular digital and social media platforms. **Please note that for some social media platforms you will need to collect this data regularly as it only allows you to go back a set amount of time, for example 30 days.**

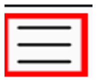
Platforms like Facebook and Instagram also provide a limited amount of data about the audience, e.g. age and location of followers, and if your objective is to engage a certain type of audience, from a particular geographic location, this may also be useful for you to note.

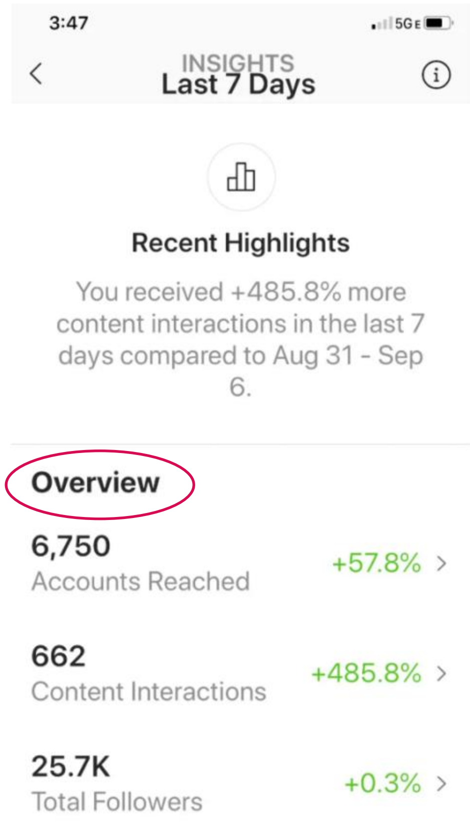
Platform	Useful Metrics
Instagram https://help.instagram.com/1533933820244654	- total impressions - total content interactions - post interactions (likes, comments, saves, shares) - story interactions (replies, shares)
Facebook Insights are available and an additional audience insights tool - https://www.facebook.com/business/news/audience-insights	- total post reach - total post engagements - average engagement rate (for posts during a particular time period) - number of 1 minute video views (during a particular time period) - average minutes of video/s watched
Twitter https://analytics.twitter.com/	- number of impressions - average engagement rate
YouTube (per video or group of videos as relevant) https://support.google.com/youtube/answer/9002587?hl=en-GB	- overall views - average view duration - number of likes
Website (Google Analytics https://analytics.google.com/analytics/web/)	- number of sessions - number of users - number of video views per video or downloads (as relevant) -average video watch time (if available) -number of conversions / conversion rate (if you're selling tickets)

Livestreaming	If you are livestreaming the metrics will vary depending on the platform you are using but generally it will be useful to understand the number of viewers for a stream and average watch time. You may also be able to collect data about the location of viewers.

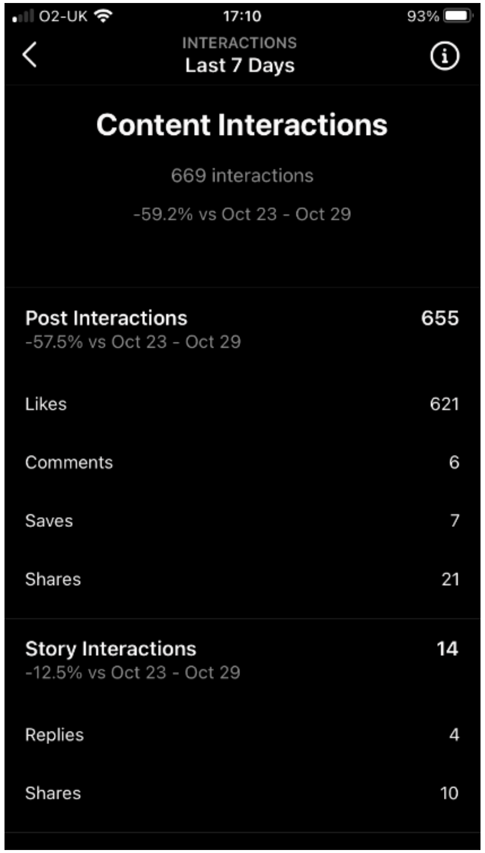
3.6.1 Instagram

Instagram digital metrics need to be collected on a weekly basis – for the week prior. This cannot be done retrospectively. The analytics feature is also only available through a mobile device.

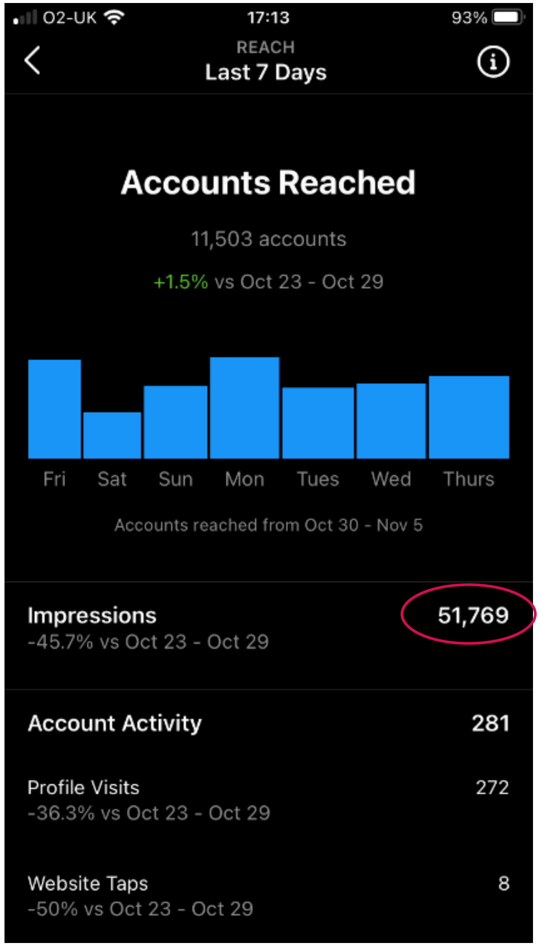
1. login via the Instagram app on your phone
2. Navigate to the insights section -> go to profile -> expandable menu in the top right hand corner  -> Insights
3. This will land on the 'Recent Highlights' page. From here you can see the total number of *content interactions* – copy this topline figure. Click on the arrow next to *content interactions*



4. This will direct you to *Content Interactions* subpage. Copy the topline numbers for:
   - Post interactions: likes, comments, saves, shares
   - Story interactions: replies, shares
   - IGTV video interactions

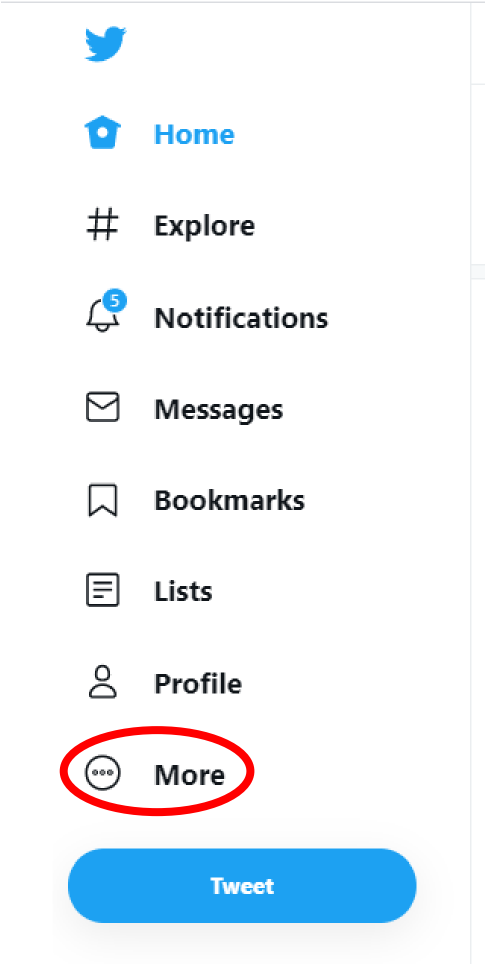


5. Navigate back to the 'Recent Highlights' page and click on *accounts reached*. Record the number of *impressions*

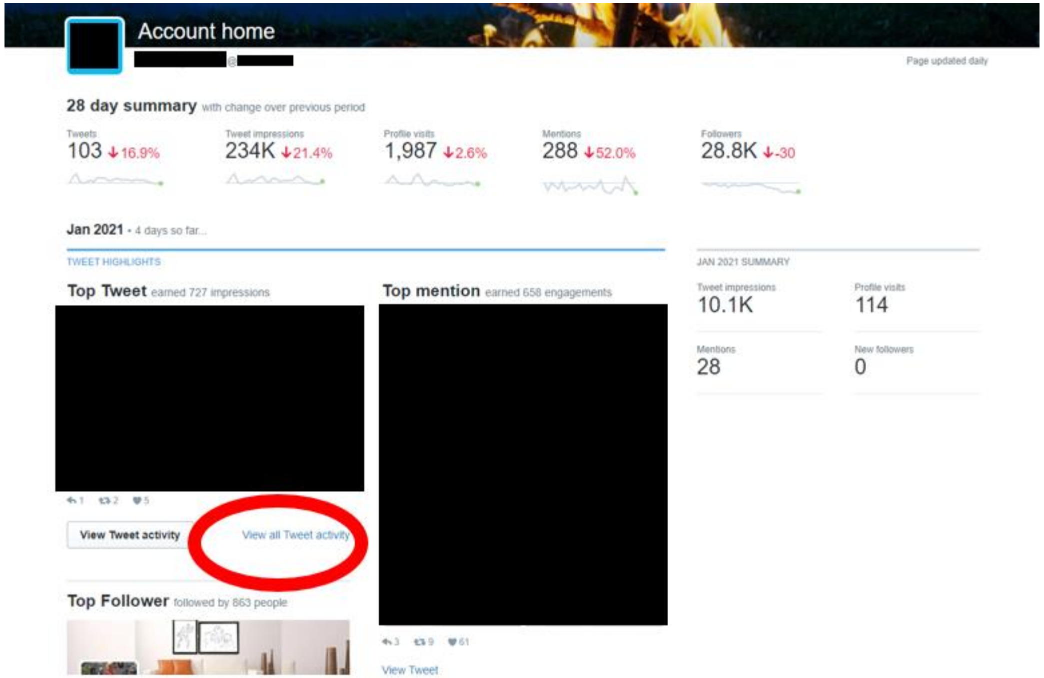


3.6.2 Twitter

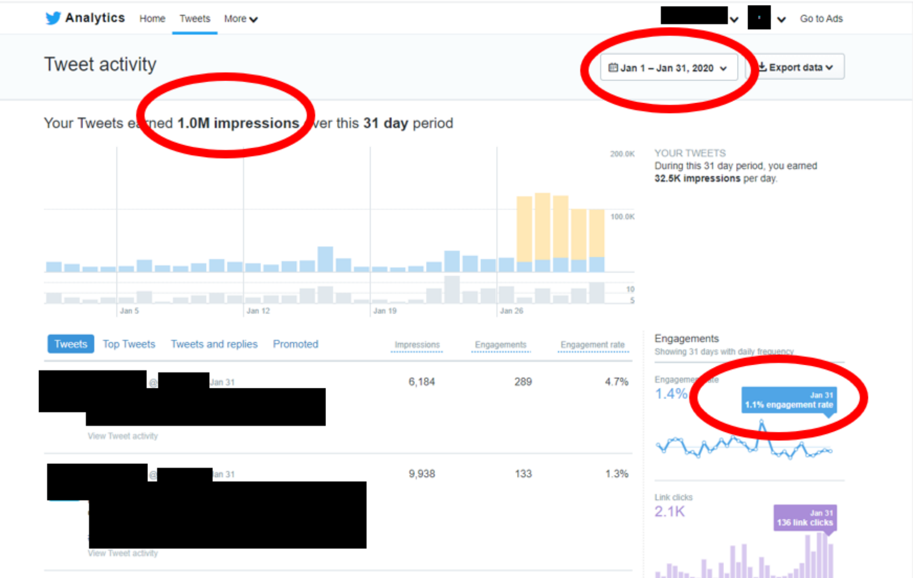
1. On newsfeed home page (default page when first login) – click on 'more' on the left-hand navigation bar and select 'analytics'.



2. The most recent 28 day period will be displayed first. However, to ensure you capture data from the full month, click 'view tweet activity' to adust the date range.



4. Adjust the date range from the calendar in the top right-hand corner



4. From this overview page you will be able to access the *number of impressions* and *average engagement rate* for the month – refer to image above.

3.6.3 Facebook

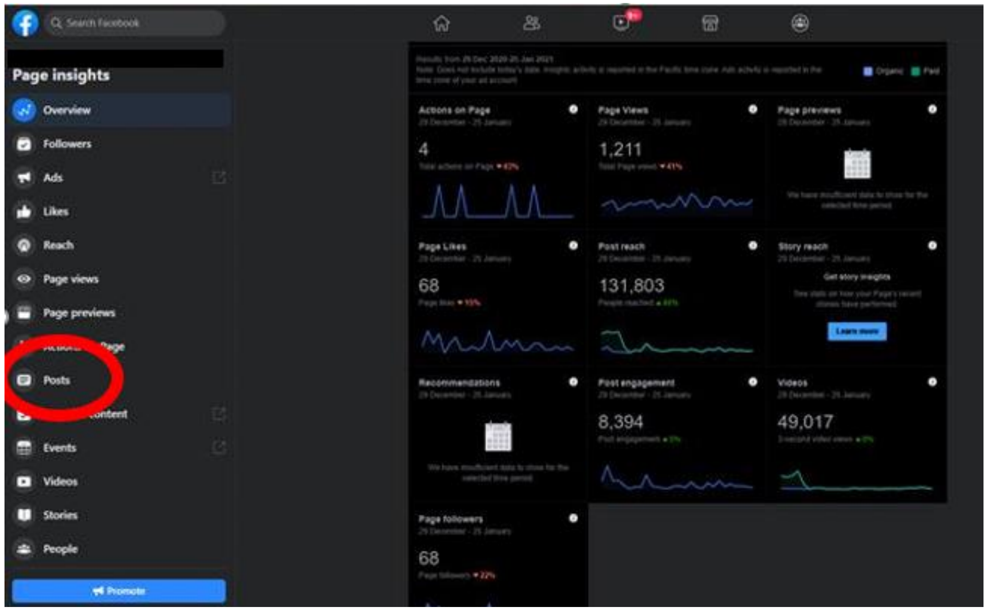
Facebook metrics need to be collected monthly. Access is via your personal Facebook account.

Useful metrics:

- total post reach
- total post engagements
- average engagement rate (for posts during this period)

1. First, set appropriate date range –
2. Page Insights -> Overview -> Posts

Select 'Export data' and 'post data' and select the relevant timeframe and export the csv file.

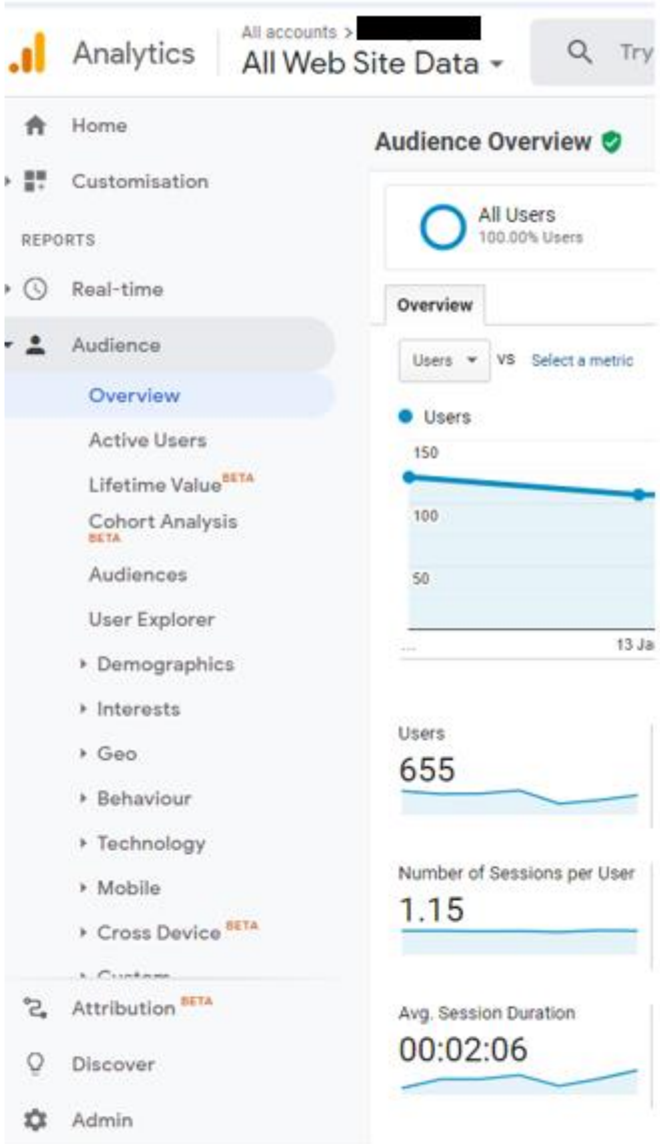


3. Navigate to the Key Metrics tab
   - **Total reach** – sum Column J *Lifetime posts organic reach*
   - **Total engagement rate** – sum column O *Lifetime engaged users*
   - **Average engagement rate** can be calculated by dividing total engagement rate/ total reach X100

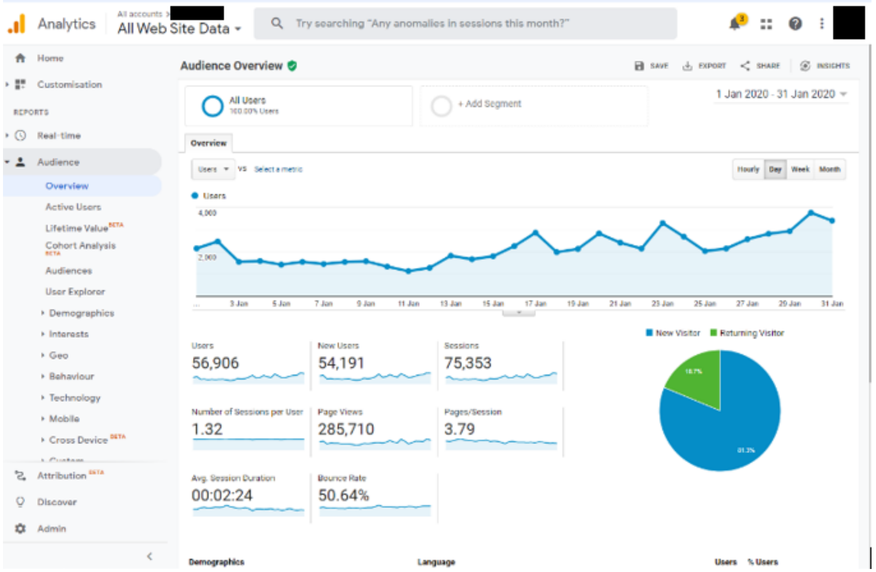
3.6.4 Google Analytics

Google analytics collected monthly for the whole site, using your login details.

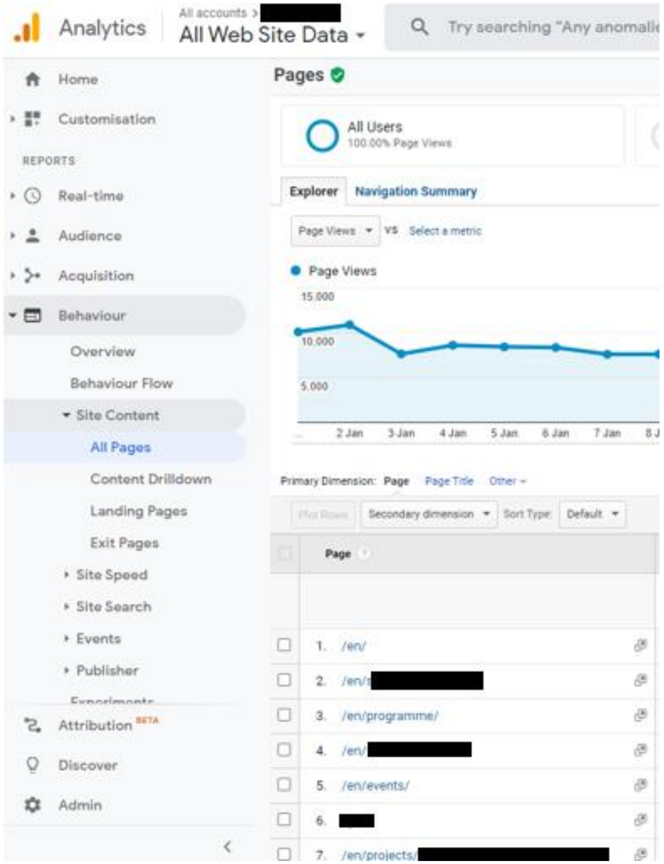
1. Log into Google analytics, make sure 'All Web Site Data' is selected in the dropdown box at the top left
2. Then from the left navigation bar, select 'Audience' and 'Overview'. You will then need to change the date range from the top right hand corner.



3. Once you've set the appropriate date range, it's useful to record the following figures:
   - number of sessions
   - number of users



4. To locate the metrics for most popular event page with associated pageviews – select 'Behaviour' from the lefthand navigation bar -> 'All Pages' – this will display a list of the top 10 pages – if needed, you can display more by clicking the arrow button at the bottom right.



5. Events pages will usually appear as follows /en/events/[event], however click on the symbol if you need to check the page.

4. Approach to analysis, reporting, reflective practice, learning and dissemination

4.1 Reflective community

The Audience Agency will facilitate three reflection events each year which share topline findings from interim and in-depth case study evaluations/ or and support reflection on particular evaluation themes and project outcomes. This will complement the training and mentoring support which focuses more on the practicalities of delivering the evaluation.

4.2 Guidance to support your own analysis and reporting for Scheme level project evaluations

Once you have collected your data, you need to turn it into useable insights. This means analysing your data and presenting the results in a way which encourages action – be that a deepening of understanding, or specific plans for developing your practice in the future.

Overall reports should be clear, concise and engaging – highlighting key findings and learning points. Evaluation reports are not advocacy reports – they should be used for learning, reflection and adaption. A combination of quantitative and qualitative evidence is most effective to demonstrate the key numbers and tell the story in in an engaging way.

Survey summaries

Most survey platforms have some kind of quick summary reporting functionality. This will typically either take the form of a downloadable pdf of your survey, with counts or percentages next to each of the answer codes and lists of open-ended responses, or an online dashboard. You may also be able to use these tools for deeper analysis, such as filtering and cross-tabulating your results.

These summaries can be a good enough foundation on which to write up your findings, or you may want to download your survey data to carry out some deeper analysis.

Given this functionality, e-surveys can be a useful platform even if your research is done using paper questionnaires – if you use the e-survey as a data entry tool, you can manually enter questionnaires and still make use of the analysis side of the platform.

Raw data

Raw data is usually downloadable from survey platforms, usually as a csv or Excel file. If you have the raw data you have more flexibility in how you manipulate or transform it – for example, you can clean responses (for example removing test responses or incomplete answers), combine with other datasets, append use data from other sources, or code open responses.

Creating charts and tables from raw data is relatively simple using Excel, or you might want to import your data into a more specialist software package such as SPSS.

Quantitative data

- Should always be presented with information about sample sizes and margin of error
- If you feel that there is one group or type of respondent which is over-represented in your data-set, or there is in any other way bias in your data, you may need to 'weight' your quantitative findings. In order to effectively weight the data, you need to estimate the size of the population i.e. the size of the whole audience (see section 3.2 for more on this). For an introduction to weighting see this article https://www.theaudienceagency.org/resources/guide-representative-and-reliable-surveys
- If robust, this information forms strong headlines for reporting, which can then be brought to life with qualitative responses.

For example, our COVID-19 Cultural Participation Monitor have used different ways of presenting quantitative data: https://www.theaudienceagency.org/covid-19-cultural-participation-monitor/wave-4-key-insights

Qualitative data

- Whether collating comments from open survey questions or longer interviews, data should be reviewed in relation to the key questions
- A straightforward approach is to understand both the weight i.e. strength of feeling about a particular subject in the context of the numbers of participants who feel this. Then it is possible to identify those issues which the majority feel strongly about
- It can be helpful to transform transcribed text from interviews, discussions or comments cards into a word cloud, using a simple tool such as www.wordle.net enabling the key words which are most used to be visible. Comments with these words in could then be searched for

amongst the responses, grouped to recognise themes and used within reporting.

Case studies

Case studies are an effective way of bringing your findings to life or evaluating more deeply a particular aspect of your scheme or project. A case study may focus on one example project or activity which is studied in depth and is particularly characteristic of the scheme or project as a whole; or it may select a theme to explore which is important to the scheme or project and study one or more examples which demonstrate the outcomes.

Case studies can be presented as 'call out' boxes within a report, use visuals of the activity or research respondents and/or be presented as a video or short presentation.

Here's a useful resource which describes a case study approach:

https://gem.org.uk/our-work/publications/case-studies/

Reporting Structure

When presenting your findings, consider:

- Who do you want to communicate the findings to? Is the language appropriate for that audience? What are they going to be most interested in?
- Give an appropriate level of background, to explain what the research was and why you did it.
- What's the most appropriate way of visualising each finding? Should you use a pie chart, a line chart, a bar chart, a table, a word cloud etc? Would the finding be more impactful if you described it, rather than just showing a chart?
- How robust are your findings? Check the strength of your results with a sample size calculator, and mention any likely bias.

There is no right or wrong way but the following is a suggested structure for reporting:

- An introduction to the project and partners
- Aims of the project and evaluation questions
- Findings, which could be structured according to the aims
- Unexpected outcomes (i.e. that don't relate to the aims)
- Conclusions and recommendations for future practice.
- How do you turn data into meaningful information?

- How does it compare with your objectives? Have you achieved what you set out to do?
- How does it compare with your expectations, the expectations of partners, with other projects?
- Look for significant trends but try not to make sweeping interpretations, present them objectively.
- Mix different types of evidence to point to possible reasoning (quantitative and qualitative).
- Accompany your reporting with images, quotes or personal testimony.

Ideally evaluation should do more than present the cold facts of the situation

- It should look at underlying trends and issues, make comparisons with the original aims and provide interpretation and insight. Most importantly it should tell the story and make this story as relevant and engaging as possible through the way it is presented.

For any other advice or assistance please get in touch with The Audience Agency

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