Evaluating your engagement activities

Developing an evaluation plan

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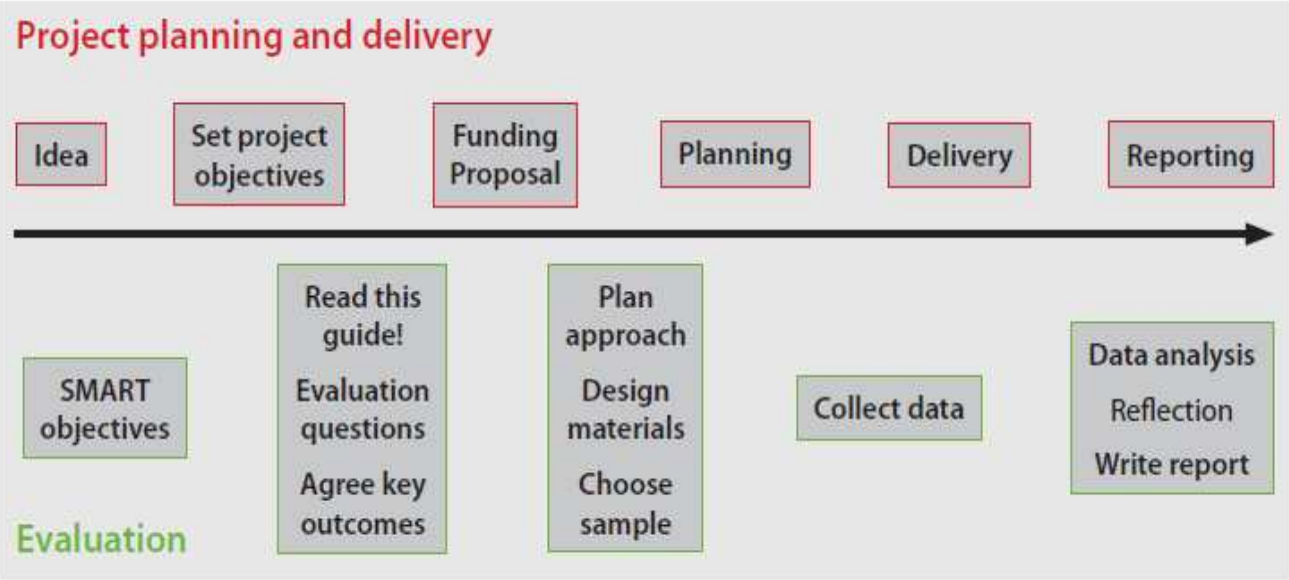
Why evaluate your engagement activity?

Benefits include:

- Help improve practice.
- Demonstrate impact of activity.
- Helps with funding applications / secure funding.
- Proves value and benefits of your activity.
- Inform or demonstrate commitment to institutional access agreement.
- Focus on what you want to achieve and how you will know if you have been successful.
- Provides you with evidence.
- Offers opportunity to improve your practice.
- Record of your achievement.
- Demonstrate value for money.
- Can inform future activities and improve them.
- If shared, can inform practice of others.

What are you aiming to do?

It is important to develop your evaluation plan alongside your project/activity plan. It does not need to be a lengthy document but it will give your evaluation structure and focus.



Source: Ingenious evaluations: A guide for grant holders, The Royal Academy of Engineers

EVALUATION PLAN

Project/Event/Activity:

AIM: *What I want to achieve*	**OBJECTIVES:** *What I need to do to achieve my aim*

EVALUATION QUESTIONS: *What I want to know*

METHODOLOGY: *Which strategy I will use*

DATA COLLECTION: *Which data collection technique(s) I will use*

DATA ANALYSIS: *How I will analyse the data*

REPORTING: *Who will be reading my report*

What is an evaluation plan?

An evaluation plan is a step-by-step guide of your evaluation. It summarises what you are going to do, why you are doing it and how you will undertake the process. It is a summary of your evaluation process and therefore does not need to be a long document.

Your evaluation plan should include:

1. **Aim** (what do you want to achieve? The big picture!)
2. **Objectives** (what you need to do to achieve your aim?)
3. **Evaluation questions** (what do you want to know?)
4. **Methodology** (what strategy will you use?)
5. **Data collection** (what techniques will you use to collect your evidence?)
6. **Data analysis** (how will you analyse your data?)
7. **Reporting** (who will be reading your report?)

Unless you know the purpose and audiences for your evaluation – it is impossible to come up with a good plan. For example, if you are not prepared to learn from the evaluation in order to inform your own practice – then you may want to reconsider whether to evaluate your activity at all. If the funder expects certain things from your evaluation – then you need to ensure your plan enables you to collect the relevant data to address the questions the funder has. Finally – an understanding of the limits of budget and resources, means that when you put your funding proposal together – you don't over claim what the evaluation can show you. This is particularly pertinent if you are claiming impacts that are measurable over a long time period and have no plan to evaluate after the end of the project.

Aim and objectives

Aim - why are you doing the activity?
What is your overall aim of your activity? This will be the same as your project/activity plan aim.

Objectives – how are you going to achieve that aim?
Your objectives should be the same as those in your project plan. Remember they need to be SMART:

S pecific - straight forward, focused and well defined with emphasis on action and the required outcomes. Something you can actually do that will help you to achieve your aim.
M easurable - how you will measure progress toward the attainment of each objective you set. You need to think about how you will know whether the objective has been, or is being, achieved.
A chievable – can you get the objectives done. Make them stretch you, but not so far that you become frustrated and lose motivation. Will make you think about how much money you need, what skills you and your team need and how long it will take to plan and run the activity.
R elevant – must be something you can actually do that will help you to achieve your aim, taking into account the resources you have for your activity including financial, personnel and time resources.
T ime defined - must have deadlines but they need to be both achievable and realistic.

EVALUATION PLAN - EXAMPLE	
Project/Event/Activity: "From Supermarkets to Sewers" Science Show	
AIM: ***What I want to achieve***	**OBJECTIVES:** ***What I need to do to achieve my aim***
To promote healthy eating by explaining how the body digests the food we eat.	To explain how the human digestive system works. To develop an understanding of the importance of eating 5 fruit and vegetables a day. To create a fun science show that young people enjoy. To run 40 shows for schools and 20 shows for families.

Evaluation questions

What do you want to know?

Evaluation questions are what you want to know and may include what your funder or institution also wants to know.

Remember to think about questions that not only measure outputs but also outcomes and possible impact – whether short or medium term.

What is meant by Output, Outcome and Impact?

Outputs = direct results of you activity
eg. How many took part? What type of people took part? How many sessions were delivered? How could it be improved?
Outcomes = overall benefits – changes in behaviour, knowledge, skills of people, organisations or environments
eg. Did people change their behaviour or attitudes? Acquire new knowledge or skills? How did your activity achieve these outcomes? How could it be improved?
Impact = overall intended or unintended effect or influence
eg. Has the activity had an impact? What type of impact? Could the impact have been greater?

Generally, outcomes not outputs lead to impact. Outputs give a context and support outcomes.

EVALUATION PLAN - EXAMPLE
Project/Event/Activity: "From Supermarkets to Sewers" Science Show
EVALUATION QUESTIONS: ***What I want to know***
Do young people understand how we digest our food? Do young people understand the importance of eating a healthy diet? Do young people find the show fun and entertaining? How many people attended the shows? How could we improve the show?

Creating indicators

Indicators are tools for simplifying, measuring and communicating important information. They can provide focus and add structure. Make your indicators manageable and jargon-free with no more than 6 per activity.

A good way to remember this is to think of AIMS:

A ction	Indicators are relatively action-focused because they look at the impact of certain behaviour.
I mportant	Remember, what is important to you may be only important to you. Work with a group of people to see what matters most.
M easurable	Can data for the indicator be collected? Remember to think creatively.
S imple	Avoid making your indicators too complicated. Simple is best!

You should have a mixture of qualitative and quantitative indicators for outputs and outcomes.

- Output indicators help you to assess the work generated by the activity and to show progress towards meeting your objectives ie. number of activities, services and products.
- Outcome indicators help you to assess the changes that take place as a result of your activity, and show progress towards meeting your aims ie. what signs will show us that the change we hoped for has happened?

Devising your methodology

What strategy will you use?

Challenge of measuring impact

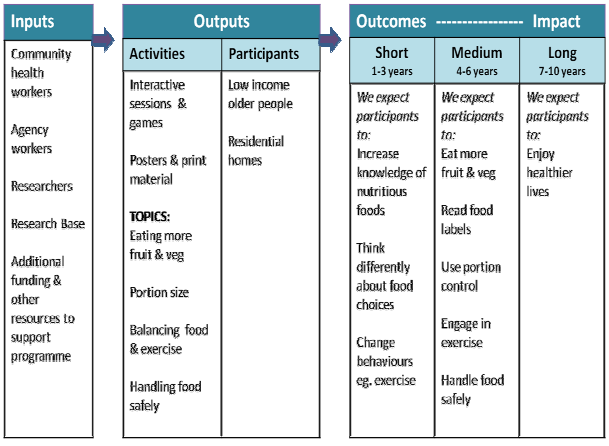
The top challenges of measuring impact include:

- Difficulty of proving or measuring causality.
- Resources needed to properly measure long term impacts (ie longitudinal studies are resource intensive).
- Attrition.
- Variety of factors involved many of which are nothing to do with you.
- Lots of things outside of your control.
- Many impacts are unexpected and therefore difficult to set up a system to measure them.
- Difficulty of setting up control group -to ensure differences in outcomes are not attributed to the intervention if they are in fact the result of changes in the 'state of the world'.

Logic Modelling (or the Logic Chain)

A systematic visual approach to capturing benefits, changes and outcomes (leading to impact) is logic modelling. It looks at the relationship between inputs, activity and resulting changes.

Logic modelling identifies measurable short term outcomes as stepping stones that hopefully create longer term impact.



Kirkpatrick Model

Another useful tool for thinking about the methodology of an evaluation is the Kirkpatrick model. This is helpful for thinking about how much evaluation to undertake for a particular initiative. There are four levels of potential impact of a initiative according to the Kirkpatrick model:

a. Reaction – The initial response to participation *(e.g. immediate feedback on the initiative including things like enjoyment, facilities, best and worst aspects of initiative)*

b. Learning – Changes in people's understanding, or raising their awareness of an issue *(this might include a baseline to establish changes)*

c. Behaviour – Whether people substantially modify what they do longer term *(assessment of changes and measurement of the extent)*

d. Results – To track longer-term impacts of the initiative on measurable outcomes *(might be difficult to separate effects of an initiative with other things which have an impact on the relevant results)*.

Triangulation

Triangulation looks at different approaches so developing a deeper picture of the activity. It involves capturing different perspectives on your activity eg. from the public (*the participants*), your own (*the deliverer*) and a neutral observer who can be a helper or colleague (*the evaluator*). This coupled with being systemic and structured in your approach, can reduce bias.

Quantitative and qualitative data

Ideally you should be collecting a mixture of both quantitative data (eg. responses to factual questions – WHAT happened) and qualitative data (eg. responses to open questions – WHY something happened). The latter allowing you to explore and understand what is happening in more depth. For example:

Overall, how satisfied, or dissatisfied, were you with your visit to the event today?
PLEASE TICK(✓) ONE BOX

Very satisfied	Fairly satisfied	Neither/Nor	Fairly dissatisfied	Very dissatisfied	Don't know
☐	☐	☐	☐	☐	☐

What on thing would have made today's visit more enjoyable?
PLEASE WRITE IN BOX BELOW

Source: MORI North for Museum of Science and Industry

Creating a baseline
It is important to create a baseline from which you can measure and evidence any change. It will help you know if people's knowledge or attitudes have changed and where you are starting from.

There are other stages at which you can conduct evaluation:

Front-end – to inform the initial creation of an activity/event.
Formative – to support the development of the activity/event.
Summative – to assess the final impact of the activity/event and learn for next time, and to make a case for future funding/ support for that activity.

Sampling
You do not have to evaluate everyone and every activity – just a representative sample. A large sample takes longer to analyse and is often not likely to give you any more information. Quantitative data usually involves larger sample sizes (eg. 40-60) and you should ask at least 100 people before expressing results as percentages. Qualitative data involves smaller sample sizes (eg. 10-20) but is in more depth.

Ethics
When collecting data consider the following ethical issues:

- Be professional and treat participants with respect
- Inform people that evaluation is taking place
- Inform participants about purpose of research
- Ask permission to record
- Be honest about constraints influencing decisions
- Keep names and contact details confidential
- Consider data protection procedures
- Use a range of methods
- Use open-ended methods
- Do not leap to conclusions without evidence.

EVALUATION PLAN - EXAMPLE

Project/Event/Activity: "From Supermarkets to Sewers" Science Show

METHODOLOGY: ***Which strategy I will use***

Audience: school children, children with families, teachers, parents/carers, staff delivering the show.

A range of qualitative and quantitative methodologies will be employed including 3 interactive questions, in-depth interviews with sample of schools and families, and staff debriefs. Attendance numbers of adults/children will be recorded.

A baseline will be established as part of the in-depth interviews – questions asked before seeing the show and then questions asked afterwards.

DATA COLLECTION TECHNIQUE ➡ **YOUR EVALUATION QUESTIONS** ⬇	**Participant** (Your public)	**Deliverer** (You and your helpers)	**Evaluator** (An observer)
Resources			
Activity			
Outputs (results of activity)			
Outcomes (overall benefits)			
Impact (overall effect/influence)			

Collecting your data

When deciding how you will be collecting your data, remember to consider the following:

- suitability for the audience
- questions you are trying to find the answers to (ie. your evaluation questions)
- time (of both evaluators and participants)
- space and location
- situation eg difficult to get people to fill in a questionnaire at railway station.

Collection techniques

There are various collection techniques you can use from the traditional questionnaire to the more creative artwork or vignettes. Some examples include:

- Comment cards, postcards
- Questionnaires
- Interviews
- Focus Groups
- Graffiti walls
- Video or photographs
- Observation
- Letters, emails
- Artwork and sculpture
- Role play/acting
- Vignettes/case studies.

Ask for comments creatively; on a washing line or post-its on walls

Each technique has strengths and things to consider when deciding which to use.

METHOD	STRENGTHS	THINGS TO CONSIDER
Graffiti Walls	• Are interactive as comments can be made to look attractive as part of a display - people can read others' comments and may be encouraged to add their own • POST IT notes can be used as a colourful / cheap way of getting people to share their comments	• Comments need to be fixed strongly to the wall or they might be lost • Provide a posting box for people wanting to keep their comments anonymous
Drawings	• Are useful when writing skills are limited and may be more "fun" or engaging • Can be used in combination with written comments to aid analysis	• These are challenging to interpret without questioning and mediation
Observation	• Observation can work well if participants "talk out loud" about their experiences while the observer walks around with them - an accompanied experience	• May need to be combined with interviews or questionnaires • If people know they are being observed their behaviour may be affected
Video	• Is an appealing alternative to traditional comments cards - may be more fun and engaging for some users than writing comments • Is potentially a powerful tool for gathering evidence for advocacy purposes	• Analysis of video may be time-consuming with too much material e.g. from a discussion • Needs to be edited properly • Not easy to set this up unless integrated into the design of a space

For more information on the pros and cons of different creative techniques visit *Research Methods*, Inspiring Learning For All, MLA http://inspiringlearningforall.gov.uk/export/sites/inspiringlearning/resources/repository/Methods_-_strengths_and_we.pdf

Asking questions

There are two types of questions:

Open questions: Open questions have no predetermined set of responses, and participants are free to answer however they choose. An obvious advantage is that the variety of responses can be richer and more truly reflect the opinions of the respondents. This increases the likelihood of you receiving unexpected and insightful suggestions.

Open questions do have several disadvantages:

- There is no way to automatically tabulate or perform statistical analysis on them.
- They are also open to the influence of the reader, for no two people will interpret an answer in precisely the same way.
- They require more thought and time on the part of the respondent. Whenever more is asked of the respondent, the chance of tiring or boring the respondent increases.

Closed questions: Closed questions are usually multiple-choice question. They offer many advantages:

- Time and money.
- By restricting possible answers, it is easy to calculate percentages and other statistical data.

When writing questions consider:

Clarity: Questions must be clear, succinct, and unambiguous. Eliminate the chance that the question will mean different things to different people. For example, if asking a question about frequency, rather than supplying choices that are open to interpretation such as:

Very Often
Often
Sometimes
Rarely
Never.

It is better to quantify the choices, such as:

Every Day or More
2-6 Times a Week
About Once a Week
About Once a Month
Never.

Leading Questions: A leading question is one that forces or implies a certain type of answer. It is easy to make this mistake in the choice of answers. A closed question must supply answers that not only cover the whole range of responses, but that are also equally distributed throughout the range. For example these answer choices are weighted more towards a favourable response:

Superb
Excellent
Great
Good
Fair
Not so great.

A better way would be to ask the same question but supply the following choices:

Totally agree
Partially agree
Neither agree or disagree
Partially disagree
Totally disagree.

Phrasing: Most adjectives, verbs, and nouns in English have either a positive or negative connotation. It is advisable to try to use verbs that have neither strong negative or positive overtones.

Hypothetical Questions**:** Avoid hypothetical questions because they ask for conjecture.

Prestige Bias: Prestige bias is the tendency for respondents to answer in a way that make them feel better. There is little that can be done to prevent prestige bias.

EVALUATION PLAN - EXAMPLE
Project/Event/Activity: "From Supermarkets to Sewers" Science Show
DATA COLLECTION: ***Which data collection technique(s) I will use***   The 3 interactive questions will be built into the show and asked at each performance. In-depth interviews will be held with a selection of schools and family groups as well as staff debriefing meetings at the beginning, in the middle and at the end of the scheduled run of shows.

Analysing and interpreting your data

This stage involves analysing, interpreting and reflecting on the evidence you have gathered. It is important to:

- Allow plenty of time
- Refer back to original aim and objectives – your evaluation questions
- Group data into categories or themes (ie. coding)
- Use highlighters to mark key points
- Look for patterns and trends and themes
- Find representative quotes
- Look for contradictory data
- Be critical of your interpretation of data
- Ideally discuss data with colleagues.

Using coding and frameworks

Coding is a method by which you can quantify qualitative data – to group the data into categories that can then be counted. You can code any questions where respondents have entered their own answers. It can be simple (such as negative and positive comments) or more complex.

Coding frameworks are often used for reporting, for example Generic Learning Outcomes (museums), SROI (Social Return on Investment) model and even possibly RCUK's Pathways to Impact.

Critical Reflection

To maximise the benefits of your evaluation plan you need to critically reflect on your activity. It is about learning from experience. Asking "what if …?". Therefore, the key questions to ask are:

- what worked well?
- why?
- what did not work well?
- why not?
- what will I do the same next time?
- what will I do differently next time?

Reporting your findings

There is no point in spending energy on collecting data unless you use the information, learn from it and share it with others. One way to do this is to produce a written report or case study but there are some key things to remember:

- think about who will be reading it and tailor the content to their needs.
- if possible remember to feedback findings to those involved, value their contribution and thank them.
- make sure the findings are acted upon.

Your report should contain the following:

- Executive summary
- The context of the evaluation
- Aim, objectives and evaluation questions
- Description of activity/event
- Methodology (including sample size)
- Summary of evidence (data itself may form an appendix)
- Overview of the activity/event
- Conclusions and recommendations.

EVALUATION PLAN - EXAMPLE
Project/Event/Activity: "From Supermarkets to Sewers" Science Show
REPORTING: ***Who will be reading my report***   Short report will be written to inform future programme development and a case study produced to contribute to the learning department's end of year review.

Making a case/ Sharing your learning

When making your case it is important to show:

- history of evaluative practice that has informed the development of activities.
- the learning that has taken place.
- evidence that the approach is informed by the target audiences (ie. front end and formative evaluation).
- evidence of effective practice.

Consider how you can share what your learning with others. Who might be interested and in what form the sharing should take?

Resources

Below are a few examples of various resources and opportunities available to you to help and support your evaluation.

Evaluating participatory, deliberative and co-operative ways of working (Interact Working Paper)
http://www.sharedpractice.org.uk/Downloads/Interact_Working_Paper.pdf

Inspiring Learning For All

Triangulation/the Mosaic Approach
http://www.inspiringlearningforall.gov.uk/export/sites/inspiringlearning/resources/repository/gso/resource6_2.pdf

Data Collection Techniques
http://www.inspiringlearningforall.gov.uk/export/sites/inspiringlearning/resources/repository/Methods_-_strengths_and_we.pdf

Generic Learning Outcomes
http://www.inspiringlearningforall.gov.uk/toolstemplates/genericlearning/

Jargonbuster (Charities Evaluation Services)
http://www.jargonbusters.org.uk/alphabetical-summary.php

Making a difference: a guide to evaluating public participation in central government (INVOLVE)
http://www.involve.org.uk/wp-content/uploads/2011/03/Making-a-Difference-.pdf

Practical guidelines: a guide for evaluating public engagement (RCUK)
http://www.manchesterbeacon.org/about

Public engagement evaluation guide (Manchester Beacon for Public Engagement)
http://www.manchesterbeacon.org/about

RCUK's Pathways to Impact
http://www.rcuk.ac.uk/documents/impacts/RCUKtypologydiagram.pdf

SROI (Social Return on Investment)
http://www.sroi-uk.org/home-uk

Understanding Your Project: A Guide to Self-evaluation (AHRC)
http://www.ahrc.ac.uk/FundedResearch/Documents/Understanding%20Your%20Project.pdf