

If you need further information about any of the terms used in this resource, please refer to Effective Evaluation – Getting Started

Start early

Start planning your evaluation as early as possible. The best evaluation happens throughout a project, not just at the end.

Define what you plan to evaluate

Be clear about the scope, the extent of what you want to evaluate; what is included and what is excluded from the evaluation. Only collect data on what is going to be useful and used.

Agree your aim and objectives

The focus of your evaluation will be how well you have achieved your aim. The objectives which describe the steps you take to reach your aim, will also need to be measured.

Establish clear success criteria for the evaluation

Write success criteria (goals/targets) in relation to your aim and objectives. You will usually need to gather both quantitative and qualitative data.

Consider what success will look like for:

- Participants / visitors
- Volunteers / staff / trustees
- Your organisation
- Funders / supporters / stakeholders

Data sources

You will need data (information) to measure and assess your success criteria. Consider what sources of data you already have and what additional data you need to collect.

Baseline data gives you a picture of the situation before your project, so that you can measure how things have changed because of your project. Plan to collect this ahead of your project starting, if you don't already have relevant data.

Top tips:

Be realistic about what, and how much, you can evaluate when setting your success criteria. Consider the resources (people, money, time) you have to collect and analyse data and whether you can realistically gather the data to assess each criteria.

Data collection

Choosing the right method of evaluation will be key to collecting the data you need to assess your project. There are a wide range of evaluation methods, and it is important to select the best method to measure the success criteria. For example, if you want to measure what people have learned from a workshop using a qualitative method will be appropriate. However, if you want to know how many people attended the museum for the first time, then a quantitative method will be the right choice.

Here are some of the most common data collection methods:

Data collection method	Use
Focus group	For detailed qualitative data
Individual interview / conversation / observation	For detailed qualitative data
Poll	Snapshot quantitative data
Visitor book / comment cards	Open quantitative data, can be targeted by posing a question on the card
Questionnaire/ Survey	Mostly quantitative data but can also include open questions or comments
Structured meeting	Useful for staff/volunteers to gather qualitative data
Feedback wall / poster / pledge tree	Qualitative data, inviting comments in response to a question / statement

GDPR (General Data Protection Regulation)

If you collect any personal data, you need to ensure you are meeting the requirements of the Data Protection Act 2018, also known as GDPR, on how that data is gathered, stored, used, and disposed.

One of the GDPR principles is data minimisation. Data should only be collected that is “adequate, relevant and limited to what is necessary in relation to the purposes for which they are processed” (Article 5 (1) C), so think carefully about whether personal data needs to be collected. Personal data is defined as “any information that relates to an identified or identifiable living individual.” This includes name and surname; home address; email address. Sensitive data, which has stronger legal protection includes race, ethnic background, sexuality and more. Find out more at: [Data protection: The Data Protection Act - GOV.UK \(www.gov.uk\)](https://www.gov.uk/data-protection-the-data-protection-act)

Make a simple evaluation plan

A plan will let everyone know what needs to happen, when, and who is responsible for it. It can show the allocation of resources, the methods to be used and how each success criteria will be measured.

See example evaluation plan (separate document)

Data analysis and presentation

When you have gathered your data, you will need to analyse it and consider how to best present the results. The final format for your evaluation will depend on the audience and their needs. Evaluation can be included in reports to trustees, funders, and stakeholders. It can also be used to make an evidence-based case for future programming, funding, or improvements.

Data analysis

Be open about the size of the data set, for example: how many people voted in the poll and what percentage of total visitors was that? The results in relation to the size of the data set will help support you in decision making.

Include learning or ways to improve. All feedback is valuable and criticism or suggestions for improvement should be the most valued. Evaluation is a process of learning, not a confirmatory exercise. Value most the comments which help you learn and improve.

Data presentation

Make clear statements in relation to the success criteria and the extent to which they were achieved.

When presenting data, ensure that it is not possible to identify individuals especially if you have a small data set.

Visual presentation and use of percentages rather than raw data will help your audience understand the data. Chart, graphs, word clouds are good ways to visualise data.

Include images that illustrate your results – they help people reading the report to visualise the subject. It is vital that you have obtained permission from any people shown in the images to use them for this purpose.

Include illustrative quotes from qualitative data – these should be anonymised e.g., a young person, or a visitor

Include relevant comparators from previous years data, and from other similar museums/events/projects. This gives context by comparing your results against other data sets.

Using your evaluation

Share your findings with trustees, staff, volunteers, visitors, and participants in the project – social media, press, newsletters, reports

Create a case study from your evaluation, this is a powerful tool for describing the project's impact.

Consider the evaluation results in relevant staff/volunteer/trustees' meetings.

Refer to it when planning future priorities and making the case for further funding / resources. See the Evidence-based case for support resource for further information.

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