

**EVALUATION TOOLKIT FOR THE VOLUNTARY AND COMMUNITY ARTS
IN NORTHERN IRELAND**

TO THE ARTS COUNCIL OF NORTHERN IRELAND

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INTRODUCTION

This evaluation toolkit was written in 2004 to help voluntary and community arts organisations in Northern Ireland to evaluate their work, especially their **social impact on participants**. Arts organisations in Northern Ireland are subject to strong pressures to measure their achievements and some already have excellent evaluation systems. This toolkit aims to increase the consistency of evaluation work so that individual arts organisations can better understand and explain their effects, but also so that the entire sector can make a stronger case to the Government. The toolkit is the first stage in a larger process that will a) see evaluation extended to all sectors of the arts, and b) will evaluate the impact of arts organisations' work on audiences as well as participants.

This toolkit was written in part **in response to demand from arts organisations** in Northern Ireland. Annabel Jackson Associates carried out a survey of arts organisations in 2003 which found that:

- 90 per cent of respondents thought that more or better evaluation information would help their organisation.
- 79 per cent of arts organisations believed that evaluation would improve the effectiveness of the organisation. Motivating staff and volunteers, and helping with fund-raising were secondary objectives (56 per cent and 49 per cent respectively).
- Arts organisations were keen to improve their own skills in evaluation. Some 70 per cent thought that the best structure was to support arts organisations in self-evaluation, with only 21 per cent thinking that the Arts Council should take responsibility for evaluation.

The toolkit was written by Annabel Jackson working in a **participative** way with an evaluation steering group. Members of the evaluation steering group commented on drafts of the toolkit and tested the ideas in their organisations.

The members of the **evaluation steering group** were:

- Andersonstown Traditional and Contemporary Music School
- Arts & Disability Forum
- Belfast Community Circus
- Community Arts Forum
- Kids in Control.
- Mid-Armagh Community Network
- Open Arts
- The Armagh Rhymers
- The Playhouse
- The Verbal Arts Centre
- Wheelworks

We would like to express our warm appreciation for the time, energy and enthusiasm of our excellent steering group. We hope that the product of our effort is as useful to apply as it was enjoyable to create.

Annabel Jackson Associates also produced a **review** of evaluation toolkits and performance measurement systems in the arts, which is available on request.

The toolkit was designed according to the following **principles**:

- The toolkit should ask questions of interest to arts organisations and participants. These should be questions the answers to which have the capacity to change lives and elevate communities.
- The toolkit should make evaluation as easy as possible. The text should be action oriented. Explanation should be relegated to an optional reference section.
- The toolkit's evaluation framework should compress the largest amount of meaning into the smallest amount of work. It is essential to respect the time of staff, volunteers and participants.
- The toolkit should respect the variation in voluntary and community organisations. It should be flexible enough to suit arts organisations of different sizes, art forms, cultures, functions and stages in their development.
- The toolkit should operate at different levels. We have defined core indicators that are the minimum necessary to demonstrate the value of the arts sector. We also provide guidance to help arts organisations that want to do more to evaluate the full range of their social impacts.
- The toolkit should be mixed method: quantitative and qualitative. The method should be chosen according to the question being pursued, not according to a pre-existing ideology.
- The toolkit should respect the values of the voluntary and community arts. This sector adopts an open, developmental structure that gives importance to the process as well as the product.

The evaluation toolkit is aimed at helping arts organisations to increase their own capacity for evaluation. **Self evaluation** is helpful because it puts you in control. You know your organisation best. Self evaluation puts you ahead of your funders' demands rather than on the back foot.

The evaluation toolkit shows you how to **integrate** evaluation into your day to day operations. Linking evaluation to management systems minimises the amount of work required. It is easier to collect information as you go along rather than leaving all the paperwork to do at a later stage. Reporting is more useful because you get feedback live rather than after the event. This process of integration is as relevant to an organisation with one employee as one with five or ten employees.

Evaluation links to **other information systems** in your organisation. You will still need to monitor your financial performance, your relationship with

stakeholders such as funders and members, and any staff that you have. The skills that you learn in evaluation will help you with these tasks.

Evaluation can form the foundation for your organisation's **business plan**. The evaluation tools explained in this toolkit will help you to clarify your objectives, assess your organisation's strengths and weaknesses, and set your priorities.

There is no one way of doing evaluation. You should be able to find an approach that matches your culture and resources. The toolkit is designed to give you the skills to **customise** an evaluation approach to your own needs and circumstances.

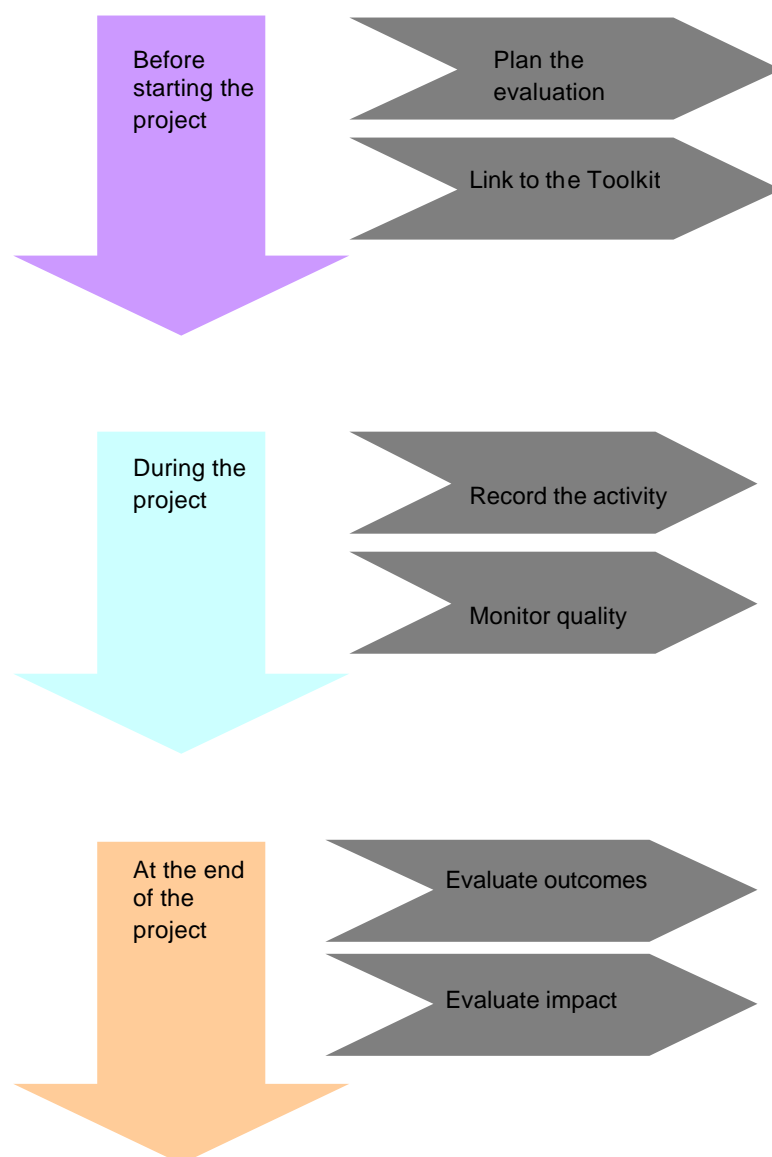
Annabel Jackson

April 2004

Stages in evaluation

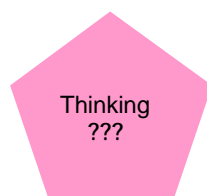
There are three stages to evaluation: before you start your project/activity, during your project/activity and after your project/activity.

The rest of this toolkit uses the word “project” to apply generally to the work (whether self contained, like a project, or continuous, like your core activity) of a voluntary or community arts organisation.

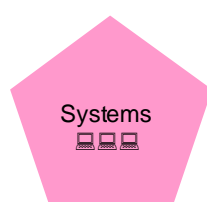


Aspects of evaluation

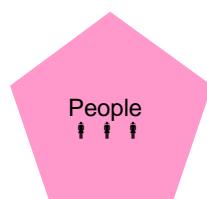
Each evaluation stage requires you to ask yourself questions, set up or apply systems, involve people and take action. The toolkit uses these **headings**:



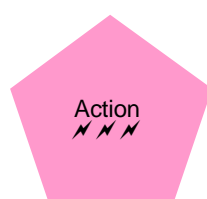
Framing, focusing, conceptualising, interpreting, synthesising



Planning, gathering data, entering data on a computer, analysing data, disseminating information



Motivating, training, involving, reassuring, listening, informing, influencing



Making recommendations, implementing recommendations

All four elements are important. If you neglect thinking, you might be missing out important issues. If you neglect systems, you might be collecting weak or incomplete information. If you neglect people, evaluation might generate resistance rather than interest. If you neglect action, valuable insights from evaluation might be lost.

Most organisations are naturally better at one of these four. One of the purposes of this toolkit is to give you practical support so that you can do each satisfactorily.

BACKGROUND ON EVALUATION

What is evaluation?

Evaluation is the art of asking interesting and provocative **questions**. Evaluation provides guidance to help you to frame precise, unloaded questions. Evaluation can help you to see through the mass of mundane or “interesting but not very useful” questions to find the true, fundamental questions at the heart of your work.

Evaluation is about **evidence**. Evaluation draws on a whole host of research methodologies that can give you a different way of seeing your work. Quantitative information (data) can reveal patterns that are not obvious, for example where particular groups of participants have benefited significantly more than the average. Evaluation is not a replacement for intuition. However, it can help you to test and explain your intuitions.

Evaluation is about **causation**. Evaluation is at its best not when it is describing or summarising your work, but when it is investigating what is achieved, why, how and when. Evaluation can help to explain the constraints and contextual factors that affect your work and therefore to help to ensure expectations (yours and your funders’) are realistic.

Evaluation is about different **perspectives**. Even the simplest project or activity can benefit from asking different stakeholders (participants, artists, partners and funders) about their experiences and perceptions of your work.

Evaluation is about **reflection**. Evaluation can provide a structure to prompt and record feedback on your achievements. You probably already have observations about what works and what doesn’t work in projects or activities. Evaluation helps you to make the best of these observations so that they are not lost in the busy day-to-day life of your organisation.

Evaluation is about **learning**. Evaluation is a continual process of questioning, seeking evidence and reflecting on the findings. Through time this will allow you to improve your work and ensure that you make the best use of the resources that you have available. Thus evaluation not only measures, but also contributes to success.

Benefits of evaluation

Evaluation can help to make your organisation more **effective**.

Evaluation can make your organisation more **confident** in telling funders what works and what doesn't.

Evaluation can help funders, participants and other stakeholders to **understand** your organisation better.

Evaluation can make **fund raising** easier and faster.

Evaluation can help you to develop your organisational **memory** so that lessons are not lost.

Evaluation can make your organisation more **customer-focused**.

Evaluation can help you to **anticipate** problems in the organisation so that they can be dealt with early on.

Evaluation can help you to **motivate** staff and participants.

Myths about evaluation

Evaluation is about **proving** the value of your work. On the contrary: evaluation is more interesting and powerful if it asks broader questions about what your work achieves and how. Evaluation information can feed into advocacy but evaluation questions should be neutral rather than tainted by advocacy.

Evaluation is only for **funders**. On the contrary: funders tend to have fairly broad requirements of evaluation. The most meaningful and useful evaluation system will be that designed to investigate your own questions. Information for funders should be generated as a side product from this.

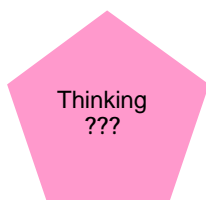
Evaluation is all **numbers**. On the contrary: most evaluation mixes qualitative and quantitative approaches.

Evaluation is **retrospective**. On the contrary: evaluation is more useful if it runs alongside your work. This means that early conclusions can provide feedback to allow you to fine tune your work.

Evaluation reduces **creativity**. On the contrary: smoothing the organisational tasks can leave more time to focus on the art.

Evaluation is **negative**. On the contrary: evaluation can celebrate achievements as well as highlighting gaps between expectations and reality.

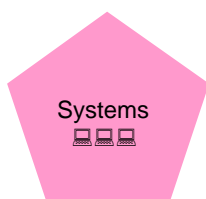
SUMMARY



Ensure you have a clear idea of what your project is intended to achieve. In particular, you need to think about:

- **What are the resources of the project?** Include human, financial, organisational and community resources.
- **What are the activities of the project?** Include processes, events, technology and actions that are part of the project. This includes the number and type of outreach events or other publicity, the number and type of sessions and the number and type of performances or exhibitions. Be aware of the choices that you have made at each stage in the project and, by implication, of the alternatives that are possible.
- **What are the intended outputs?** Generally this is the number and type of participants in an arts project and the number of visitors or audience members. However, it is relatively common to see the term “outputs” used to describe what we have listed here as activities as well as outputs.
- **What are the intended outcomes?** This refers to changes in the behaviour, skills or attitudes of participants.
- **What are the intended impacts?** Impacts are community-wide benefits whether in social or economic terms.

Arts organisations don't tend to have tightly prescribed intended outcomes like other programmes that are explicitly designed to avoid teenage pregnancy or reduce crime. However, arts projects still have broad outcomes, such as helping participants to increase in confidence and helping them to express themselves.



There are nine questionnaires that must be completed (where relevant) by all organisations receiving core funding (RFOs) or project funding over £10,000:

- **Organisational Form.** This gives background information and is relevant to all organisations. Only one form needs to be submitted and thereafter updated annually.
- **Support Services Form.** This is relevant if your organisation provides any support services to artists or arts organisations.
- **Financial Form.** This is relevant to all organisations.
- **Attendance Sheet for Individuals.** This is relevant for all projects where 90% of the group are aged 17 or over.
- **Activity Form for Participation.** This form will be relevant to most voluntary and community arts organisations. It gives information on any educational workshops, classes, or other participative projects carried out. One form is filled in per project.
- **Activity Form for Productions/Concerts.** This short questionnaire gives information on productions, so that this does not need to be repeated for each performance listing.
- **Activity Form for Performances/Concerts.** This will cover most of the work of performing arts organisations as well as the larger live performances, live shows and concerts produced by the voluntary and community arts.
- **Activity form for Exhibitions.** This covers the work of galleries as well as larger exhibitions from voluntary and community arts organisations.
- **Activity Form for Publications.** This refers to any catalogues, newsletters, books or periodicals for the arts sector last year. Do not include marketing brochures or publicity leaflets.

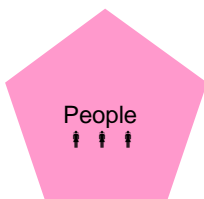
The Activity Form for Participation includes a section on exhibitions and concerts that are an inherent part of the participative process. Use your judgement to decide whether performances or exhibitions are of sufficient scale to warrant separate listing in the Activity Form for Performances/Concerts or the Activity Form for Exhibitions.

Copies of all obligatory questionnaire are given in Appendix Two. There is a simple spreadsheet for recording answers, to be analysed by ACNI.

There are eight optional questionnaires that you could use in your organisation:

- **Enrolment Form.** This records basic information about clients on participative projects. Information is collected at the first or second contact.
- **Attendance Sheet for Groups.** This records attendance for each session of a participative project.
- **Quality Form and Observation Form.** These are optional forms that you can use to help to record internal reflections on your work.
- **Outcomes Questionnaire.** This measures the short term impact of your project on the participants.
- **Outcomes Questionnaire for Young People.** This has been designed for use by people aged 11-16.
- **Artist's Evaluation Form, Teacher's/Youth Leader's Evaluation Form and Organisational Head's Evaluation Form.** These are optional forms for youth arts projects. They can be completed by a sample or all people involved in the project, in writing or over the telephone.
- In addition, ACNI will be carrying out a survey using the **Follow up Questionnaire.** This provides more detailed information on long term the impact of your project on participants.

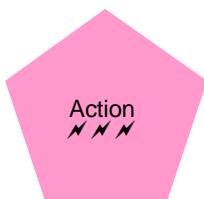
Drafts for all the optional questionnaires are given in Appendix Three.



You need to ensure that evaluation is taken seriously in your organisation. This will greatly affect the quality of the data that you receive and therefore the value of the process. Consider whether you need to:

- Train staff, freelancers and committee members in evaluation.
- Have internal feedback sessions, or an agenda item for evaluation in existing staff meetings .
- Recruit an evaluator for specific tasks or on a retainer.
- Include time to complete feedback forms in the timetable for events .
- Put evaluation or performance measurement on the agenda for your management committee.
- Put evaluation in the job descriptions for staff or contractors .
- Include a budget for evaluation in project proposals or funding applications .
- Purchase additional software for data analysis .
- Allocate a specific file (in your computer and in your filing cabinet) for feedback forms and other evaluation data .
- Think about how to ensure that evaluation data is kept confidential.
- Talk to other arts organisations about how they do evaluation .
- Have a wall chart showing recent achievements .

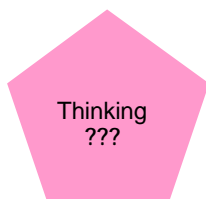
Whatever your internal arrangements, you will need to tell participants and staff early on that the project will be evaluated. You will also need to obtain permission from participants early on to pass on their details to ACNI if you wish to take part in the follow up survey.



It is important to translate the finding of your evaluation into recommendations about practical ways to improve your project. You also need to allow time and perhaps resources to put these recommendations into action. You can't improve all your work simultaneously. It is sensible to focus your effort. For example, you could identify two key improvements to make if you re-run your project.

BEFORE STARTING THE PROJECT

Plan the evaluation



Planning the evaluation can enable you to make the best of the skills and resources in your organisation. Good planning will increase the quality of the data produced, smooth the workflow and ensure that results are useful.

It is better to have one coherent set of questionnaires than to keep going back to participants to ask them additional questions that were missed out of earlier evaluations. Similarly, it is better to have accurate information on a small number of key questions than to have incomplete or biased information on a large number of questions.

Evaluation should be proportional to the scale of work. Don't expect to measure change from a single workshop. A common guideline is that you should dedicate 10 per cent of the resources of a project to evaluation.

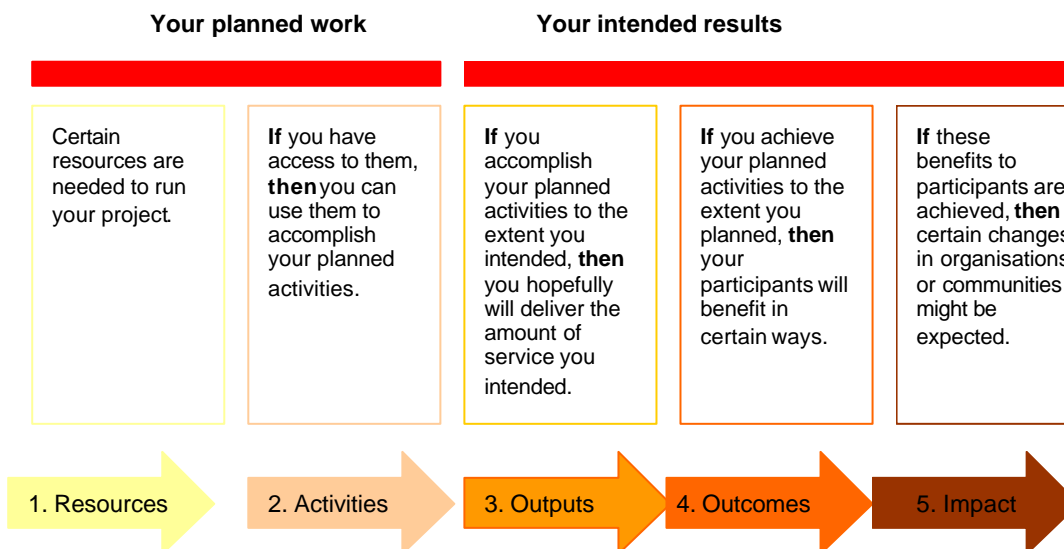
A key element of the planning process is to consider how the evaluation proposed in this guide fits in with any existing evaluation that your organisation already carries out.

There are two Thinking tasks:

Draw the Project Logic

A logic model is a picture of how your project works. It gives a visual presentation of the assumptions underlying your work, in particular the assumptions about how activities lead to outcomes. The logic model is a simple but very powerful tool that can help you clarify your thinking, measure progress along the way (through intermediate indicators) and communicate your objectives to different stakeholders. Logic models help funders and other stakeholders to understand the practicalities of projects and therefore to temper their expectations.

The Kellogg Foundation, which developed and popularised logic models, explains them as follows:



For an example of a completed project logic model see page 21.

Logic models are read from left to right, as in this diagram. However, the best way to design them is to start with outcomes and work left.

To construct a logic model you need to ask:

- **What are the intended impacts?** Impacts are community-wide benefits whether in social or economic terms.
- **What are the intended outcomes?** This refers to changes in the behaviour, skills or attitudes of participants.
- **What are the intended outputs?** Generally this is the number and type of participants in an arts project and the number of visitors or audience members. However, it is relatively common to see “outputs” and “activities” described as outputs.
- **What are the activities of the project?** Include processes, tools, events, technology and actions that are part of the project. This would include the number and type of outreach events or other publicity, the number and type of sessions and the number and type of performances or exhibitions.
- **What are the resources of the project?** Include human, financial, organisational and community resources.

Arts organisations don't tend to have tightly prescribed intended outcomes like other programmes that are explicitly designed to avoid teenage pregnancy or reduce crime. However, arts projects still have broad outcomes, such as helping participants to increase in confidence and helping them to express themselves.

In order to draw your logic model you might want to ask yourself:

- **Why was the project developed?** What is the problem or need it is attempting to address? The rationale can be positive (increasing creativity) as well as negative (reducing isolation).
- **Who are the stakeholders?** Who are the people involved in the project? Are there people who would be interested in the project who are not involved?
- **Who are the intended participants?** Why were they chosen and to what extent has the project been tailored to their needs?
- **How will the projects achieve the intended benefits?** What is it in the project that will benefit the participants? In evaluator's language this is asking about the **mechanisms** whereby outcomes are achieved.

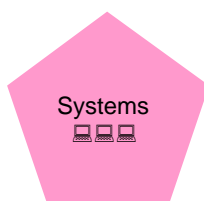
Don't make your logic model too detailed. It should fit on a page or it will be difficult to read.

Test the Project Logic

Once you have drawn the project logic you can consider whether you are on solid or weak ground, for example:

- **Where is the initiative for the project coming from?** If it is coming from funders then does it match your experience of what users need?
- **Are the resources sufficient?** Is the budget right? Are there elements missed out, like evaluation or training? Are you trying to do too much? Do you need other skills or resources? How could you obtain these? Do you need more partners? Are the time lines realistic?
- **Is there a need for this project?** Have users expressed a need for this type of project before? If not, do you need to do a survey to check need? If users have expressed a need for this type of project before, how many? Is this enough to support the project? You might want to investigate the terms on which potential participants want the new project: for example the preferred delivery conditions – most desire is conditional. There are two main methods for analysing need: written questionnaires or focus groups. You can also use other evidence of need such as waiting lists, responses to previous evaluation questionnaires and requests from other organisations.
- **Do different stakeholders have different expectations of your work?** Are these compatible or do objectives need to be re-negotiated? Are stakeholders clear about what you are doing? How important is your work to their objectives?

- **Are the activities likely to lead to the outcomes?** Are there any barriers that could prevent your target participants from using or benefiting from your proposed project? What could you do to remove barriers? This could include preparatory work or publicity to ensure take up. What could you do to increase the benefits?
- **Are there external factors that could affect your ability to reach your outputs or outcomes?** You might like to make a list of the main external factors or risks that could affect your project and think about whether you can control or monitor them.
- **Is the project right for your organisation?** Does the project match your organisation's skills and resources? Does the project match your picture of where you want the organisation to be in the future? Is there synergy with other projects, either from your organisation or another organisation? Could you capitalise on this more?
- **How does this project fit with other organisations' work?** Are other organisations already doing similar or complementary projects? Do they have information on the needs and delivery preferences of participants that would help you target your project? Could they help with recruitment or delivery?



There are two Systems tasks:

Produce an Evaluation Framework

Your logic model should help you to identify the issues you need to evaluate. For example:

- **What resources have been deployed in each stage of the project?** Are resources available at the right time and in the right form for the project? Are the resources constraining what is possible in the project?
- **What activities have been carried out?** What are the key choices that have been made in delivering the project? What are the strengths and weaknesses of each of these delivery options? Does experience suggest that these delivery options need to be reviewed?
- **What outputs have been produced?** What is the level of activity? What is the level of take up? What is the background of project participants?
- **What outcomes have been achieved?** Have participants changed their behaviour, knowledge, skills or attitudes? What percentage of participants has changed in each possible outcome area? To what extent can these outcomes be traced to the work of your project? How does (what are the mechanisms whereby) your project achieve these outcomes? How does the pattern of outcomes differ over the short, medium and long term?
- **What impact has been achieved?** Has the project had an economic or social impact? How did external factors reinforce or counter the impact of your project? How could the impact have been greater?

An evaluation framework outlines what methodology you are proposing to adopt to address your evaluation issues.

A possible structure is:

Structure for an evaluation framework

	Participants	Staff/volunteers	Evaluator or peers
Resources		Management accounts Time sheets Appraisal information Questions to artists and other project operators about the support they received	
Activities	Questions on outcomes questionnaire	Postal questionnaires or group discussion about the strengths and weaknesses of the project and key issues	Quality monitoring or observation
Outputs	Questions on background included in outcomes survey	Registration forms Output forms Session records	
Outcomes	Telephone or telephone survey	Postal questionnaires or group discussion	
Impact	Included in any outcome survey	Compile figures on staffing from the output questionnaire	Independent sector evaluation

Produce an Evaluation Plan

The evaluation plan helps you to see the work associated with evaluation. It should show:

- **Tasks.** What are the tasks required for each evaluation method? Appendix One gives a list of the tasks involved in each of the main evaluation methods.
- **Responsibilities.** If you have staff, think about who will do the work. You should think whether they have the skills and qualities to carry out the tasks. Clerical tasks, such as entering data, require precision, IT skills and the ability to respect confidentiality. Interviewing is a highly skilled task that requires the individual to suspend their own views and listen to the interviewees. Observation might require additional expert knowledge in order to make quality judgements.
- **Deadlines.** Ensure that you have sufficient time so that tasks are not squeezed out or compromised. Identify any tasks that have a lead in time and ensure these are given priority. Deadlines need to be realistic. Relate these to the rest of your work. Check that the times of heightened activity don't clash with other pressures on the organisation. For example, you might like to prepare and print out the evaluation questionnaires before they are needed. You might want your evaluation report to be ready for a specific conference or event or committee meeting, in which case you should set deadlines by working backwards from the required reporting date.
- **Targets.** Set rough targets for response rates and outcomes. This is a way of being precise about your expectations. Be realistic. Telephone surveys should aim for a 90 per cent response rate, but postal surveys sometimes only receive 20-30 per cent of the questionnaires sent out. Appendix One gives guidelines to increase the response rate for written questionnaires.

▪ **Any expenditure.**

Ensure that your plan is realistic. For example, consider:

▪ **How far do you want to go?** It is better to do a modest amount of evaluation well than to take on too much and find that the data is incomplete or inaccurate.

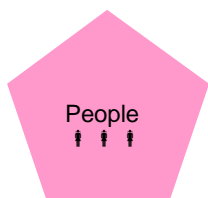
▪ **What are your organisation’s strengths and weaknesses in evaluation?** You could think about this in terms of the four elements used in this toolkit: thinking, systems, people and action.

▪ **What are the barriers to the plan being implemented?** What do you need to do to overcome them?

Evaluation might seem difficult at first because you have to think about each stage. It will become much easier as it becomes part of the way you automatically go about your day-to-day work.

Structure for an Evaluation Plan

TASKS	RESPONSIBILITY	DEADLINES/TARGETS	EXPENDITURE
Write or copy evaluation forms. This might include piloting and amending forms			Depending on the method: paper, stamps, envelopes, telephone costs
Distribute and collect evaluation forms. Set the sample, introduce the forms, collect them back, answer questions about the forms			Files to keep questionnaires
Enter data on the computer			Spreadsheet software and possibly expert help
Analyse the data			Spreadsheet software and possibly expert help
Write up. Translate findings into recommendations			
Disseminate the findings. Provide feedback to funders and respondents			Email, poster, newsletter, website, annual report
Launch the findings			Depending on the type of event: paper, venue, food
Implement the recommendations			



There are two People tasks:

Ensure Evaluation is Treated Seriously in Your Organisation

Consider whether you need to:

- Train staff, freelancers and committee members in evaluation.
- Have internal feedback sessions, or an agenda item for evaluation in existing staff meetings .
- Recruit an evaluator for specific tasks or on a retainer.
- Include time to complete feedback forms in the timetable for events.
- Put evaluation or performance measurement on the agenda for your management committee.

- Put evaluation in the job descriptions for staff or contractors.
- Include a budget for evaluation in project proposals or funding applications.
- Purchase additional software for data analysis.
- Allocate a specific file (in your computer and in your filing cabinet) for feedback forms and other evaluation data.
- Think about how to ensure that evaluation data is kept confidential.
- Talk to other arts organisations about how they undertake evaluation.
- Have a wall chart showing recent achievements.

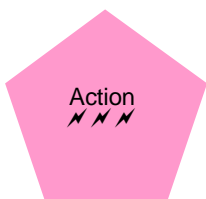
Involve Interviewees

Most of your data will come from interviewing individuals. You will be asking people to allocate some time to evaluation, for example by completing questionnaires or taking part in are prepared for the evaluation.

There are four ways in which you can involve interviewees:

- **Tell them about the evaluation.** It is good practice to tell organisations and individuals about the evaluation at the earliest possible moment. Ideally, you should mention at the beginning of the project that evaluation is an integral part of your work. Be sure to introduce evaluation in a positive light – for example, as part of your organisation's commitment to excellence and customer focus. The way you present evaluation affects the quality of the data that you receive. You really want to avoid the vicious cycle whereby evaluation is seen as a mindless bureaucratic exercise, which leads to respondents giving superficial answers consistent with a mindless bureaucratic exercise, and thereby reinforces their negative views of evaluation.
- **Ask for their permission to use information.** There are two levels of notification:
 - **Organisations.** Partners with which you are working, such as schools, might have formal procedures for approving surveys of staff or participants. You might need to apply for permission to compile data. You should also tell your partners when the evaluation will take place and you should offer them a copy of the final report.
 - **Individuals.** When they join the project participants (or parents/guardians for children) should sign Data Protection Act forms agreeing that information can be used for evaluation purposes. Participants should be told why the data are being collected and the use to which the results will be put. Most evaluators give and honour assurances that individual data will be confidential and that no personal repercussions will result from survey responses. You will need to remember this assurance when you are writing the evaluation report.
- **Minimise disruption to participants and participation.** Think about the best stage to apply the questionnaires and allow time for this to happen.
- **Feedback conclusions and actions taken as a result.** Keep people informed about how findings are used. If nothing ever changes as a result of evaluation then participants and staff won't want to continue filling in the forms.

If they are told about the purpose of evaluation, consulted about the research methods and possibly involved in the research design, involved in respectful and non-threatening ways and given feedback about conclusions then you will find that most people are happy to be involved in evaluation. Asking stakeholders' views of a project is one way of showing that you value them.



There are two Action tasks:

Monitor Your Evaluation Plan

This has two components:

- **Ensure work is completed on time.** Tick off each task in your evaluation plan when it is completed.
- **Ensure the quality of work is consistent.** Check that interviewers are not suffering from burnout. This is noticeable from skipped questions, fewer probes or fewer open ended comments in interviews, and more transcription errors in data entry. Review the data every month to check that people are asking and recording questions consistently.

Evaluate Your Evaluation

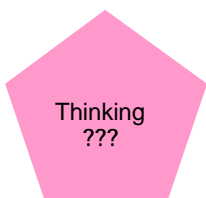
At the end of each cycle of evaluation consider:

- **Whether you need to fine tune the evaluation methodology.** You might need to reword questionnaires, give more explanation, remove questions that were not useful or include new issues that arise from the work.
- **Whether you need to change the way evaluation was carried out.** Make notes on anything that needs to be changed in the future, for example, ensuring contact details are up to date so that interviewers do not have to spend time tracking participants.
- **What your organisation gained from evaluation.** Be sure to keep notes of any benefits from evaluation so that you can use these as examples when you are motivating staff in the next cycle of evaluation.

Simple form to evaluate your evaluation

	STRENGTHS	WEAKNESSES
Planning		
Choosing evaluation methods		
Compiling data		
Analysing data		
Writing up		
Communicating results		

Link to the Toolkit



There are two Thinking tasks:

Setting the Level of Detail for Evaluation

Think about how much evaluation your organisation wants to do: whether you will:

- Use the minimum in the toolkit, the obligatory questionnaires.
- Use some or all of the additional questionnaires as well as the obligatory questionnaires.
- Add further subjects that are not in the toolkit. If this is the case, you might need further guidance on how to use methods and write questions (Appendix One).

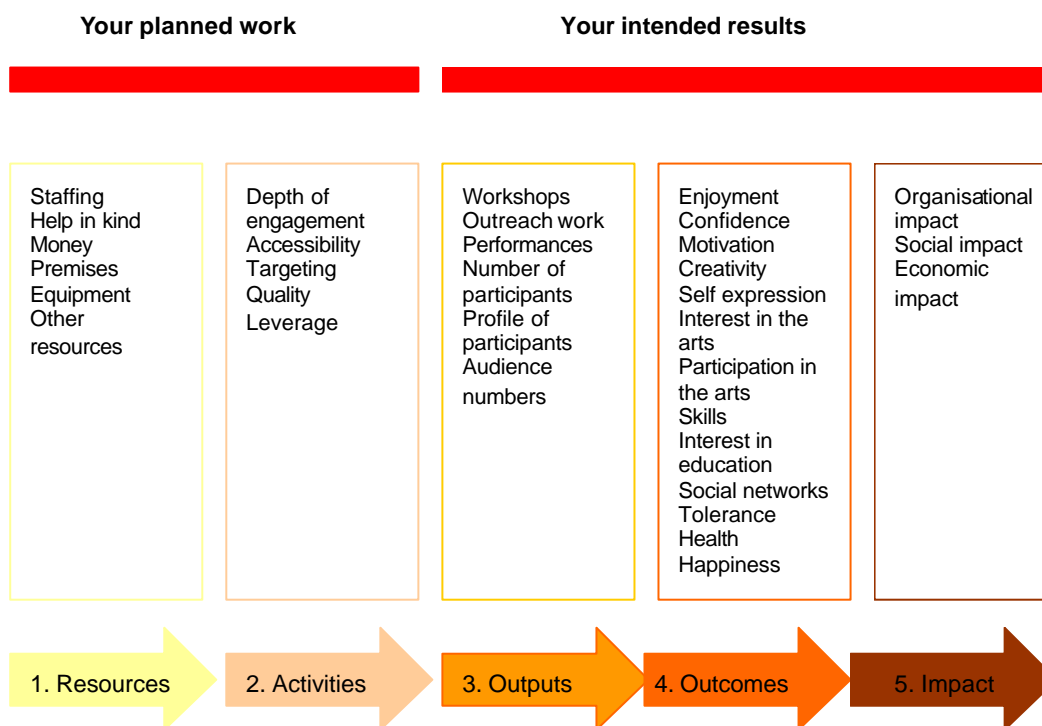
Your choice will reflect:

- The size of your organisation.
- The proportion of your work that is arts-related.
- The sophistication of your existing evaluation systems.
- The range of your work. Organisations that are continually developing new projects might want to do more evaluation than organisations with one consistent product.

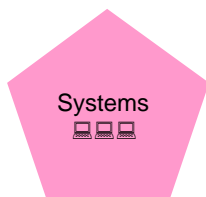
Note the Overlap with the Toolkit’s Logic Model

The logic model assumed in the toolkit is:

Evaluation Toolkit’s Logic Model



Outcomes will inevitably vary between projects and organisations. No project is expected to achieve all possible outcomes. Ideally, over time arts organisations and the Arts Council will grow to understand what kinds of projects generate which types of outcomes under which circumstances. This could produce different logic models for different types of projects. However, the logic models will always be speculative rather than predictive. Arts projects evolve organically during the artistic process. Arts projects are not production lines to produce fixed outcomes.



There are two Systems tasks:

Link to the Toolkit’s Evaluation Framework

We have drawn this toolkit as widely as is reasonable. However, you might have other evaluation requirements, especially from other funders. You need to combine these two sets of requirements so that you only have one set of evaluation questionnaires for each project.

The approach that we are suggesting is probably a bit more quantitative than most arts organisations would come to naturally themselves. Please give quantitative methods a chance: a few numbers can save you a lot of words and will have greater credibility with funders. With a little care quantitative

methods can be as meaningful and sensitive as qualitative. For example, the proposed forms look at the depth as well as the breadth of participation.

The evaluation methods that we propose are:

Evaluation Toolkit's Evaluation Framework

	Questionnaires/Sources
Resources	Time sheets Appraisal information Organisational Form* Support Services Form* Financial Form*
Activities	Quality Form* Observation Form* Artist's Evaluation Form* Teacher's/Youth Leader's Evaluation Form* Organisational Head's Evaluation Form*
Outputs	Enrolment Form* Attendance Sheet* Activity Form for Participation* Activity Form for Productions/Concerts* Activity Form for Performances/Concerts* Activity Form for Exhibitions* Activity Form for Publications*
Outcomes	Outcomes Questionnaire* Outcomes Questionnaire for Young People* Follow up Form* Artist's Evaluation Form* Teacher's/Youth Leader's Evaluation Form* Organisational Head's Evaluation Form*
Impact	Compile figures on staffing from the output questionnaire Compile figures on suppliers Independent sector evaluation

* Draft questionnaires in Appendices Two and Three

Clarify Overall Targets and Deadlines

The evaluation toolkit will be rolled out gradually over the next year or so in this order:

- Members of the Evaluation Steering Group.
- Voluntary and community arts organisations receiving revenue funding.
- Voluntary and community arts organisations receiving project funding.
- The rest of the arts sector.

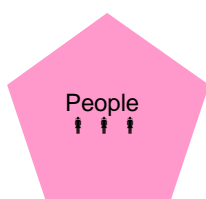
The Organisational Form, Support Services Form, Financial Form and Activity Forms will be obligatory from April 2005.

All other questionnaires are optional. The Follow up Questionnaire will be applied by an Arts Council researcher for all organisations with clients who are 17 and over and without severe learning difficulties . These organisations need to complete the Attendance Sheet for each of their projects so as to provide contact details for the Follow Up survey.

There are two People tasks:

Decide Whether to Use External Evaluators

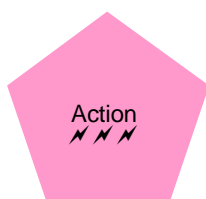
If you are intending to expand your evaluation beyond that in the draft questionnaires then you might need additional expert advice. Guidance on using external evaluators is given in Appendix One.



Plan Evaluation Training

Four areas of training are important:

- **Random sampling.** Random sampling selects specific individuals for interview from an overall population of participants. Data collectors should work hard to contact the named individuals rather than giving up too soon and selecting another name on the list.
- **Consistency.** Data collectors must ask the questions in the same way over time and across organisations.
- **An open mind.** Data collectors must suspend their own judgments during the interviewing process. Even very experienced evaluators find that respondents frequently surprise them: that their opinions are not what was expected. Data collectors must allow the space for these new views to be expressed.
- **Being positive.** Data collectors must communicate to respondents that the evaluation is important, their response is valued and the interview is not an examination to which there is one right answer.



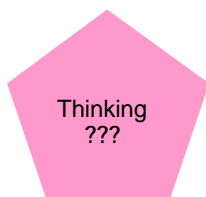
There is one Action task:

Management Committee Approval

It would be helpful to seek and receive your Management Committee's approval and support for your work on the evaluation toolkit.

DURING THE PROJECT

Record the activity



There are two Thinking tasks: recording inputs and outputs

- **Inputs** are staffing, money and help in kind.
- **Outputs** are workshops, performances or exhibitions.

Recording Inputs

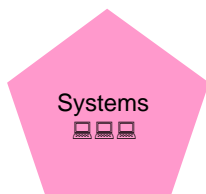
You will probably already have information on inputs from your internal management systems.

Recording Outputs

Keep track of activity as you go along. It is much more difficult and time-consuming to try and reconstruct a description of your work after the event. Record what happened, **not** what could have happened, might have happened, should have happened or will happen.

This information is simple but very useful. It is surprisingly common for arts organisations not to know how many participants they have or had. This puts them at a great disadvantage in raising funds: if you have done the work, you should take the credit for it.

The main point in measuring the outputs of voluntary and community sector arts organisations is to demonstrate the depth rather than the breadth of participation. You are unlikely to have large numbers of participants, but you could have intensive, detailed participation which you will want to communicate in your evaluation. This is not difficult to do.



There are six obligatory forms:

Attendance Sheet for Individuals

Activity Form for Participation

Activity Form for Productions/Concerts

Activity Form for Performances/Concerts

Activity Form for Exhibitions

Activity Form for Publications

Questionnaires are given in Appendix Two. These questionnaires will also give you the information to complete the Annual Survey of Regularly Funded Arts Organisations from the Arts Council (if relevant to you).

There are two optional forms:

Enrolment Form

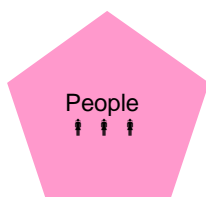
Attendance Sheet for Groups

Questionnaires are given in Appendix Three.

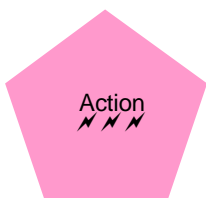
Getting Feedback on the Forms

It is worth having a brief discussion in your organisation about the output evaluation. For example, ask project staff and volunteers:

- Do they feel involved in, and clear about the purposes and benefits of the evaluation?
- Are project organisers completing the forms consistently? If not, do you need to give further guidance on how to complete the forms?



- Are the data accurate and timely? If not, do you need to give further explanation about the value of the data?
- Do the figures make sense? Are there other factors that need to be taken into account in interpreting the figures?



There are two Action tasks:

Interpret the Findings

Look at the figures from the output evaluation and consider what they mean, for example:

Were the inputs too low?	Why?	Did the project expand from its original conception?
Were the inputs of a poor quality?		Did you underestimate the resources needed for the project?
Were the inputs too late?		Did your resources change during the project?
		Do you need to do more planning?
		Do you need to work with other organisations more?
		Do you need to raise money for future projects?
		Were there problems from the terms of funding?

Was the number of outputs lower than you expected?	Why?	Do you need to increase marketing?
Were some target groups under-represented?		Do you need to strengthen partnerships?
Was the drop out rate high?		Do you need to increase outreach?
		Do you need to fine tune publicity or delivery?
		Do you need to provide more information to potential participants or partners for recruitment?
		Do you need to change the location, timing or other aspects of the delivery of the project?
Was the project over-subscribed?		Do you need to provide incentives for participants to continue?
Was there a slow start in take up?		Do you need to change the type of activity offered?
		Do you need to expand the project?
		Do you need stronger recruitment?
		Do you need a longer lead in time for setting up the project?

Act on the Findings

You need to consider whether the project is on schedule and on target. Low levels of participation will inevitably affect the outcomes achieved. This is one of the messages from the Logic Model.

Monitor quality



Think About Organisational Quality

What does quality **mean** to your organisation? Think about things that you value, or aspects that you take for granted that would impress funders. This discussion will take more time if you have new staff or new projects. It will be more straightforward if you have a fairly standard product and a small consistent team.

A **quality form** is useful because:

- It helps to define who you are as an organisation (your unique selling point), what is different between what you do and what other organisations do.
- It shows that you care about quality.
- It allows you to make the best of any time you are observing a session. The form provides a few pointers, drawing your attention to aspects of quality, which helps when you are busy.
- It helps to depersonalise criticism.

Possible **aspects** of quality could include:

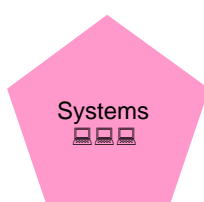
- **Was the project well organised?** Was the project well publicised? Did everyone know what was going on? Did the different parts link together? Did the different parts occur at the right time?
- **Was the project fit for purpose?** Was the content appropriate to the participants? Was the content at the right level of difficulty?
- **Was the artistic quality high?** See the next section.

Think About Artistic Quality

Comedia suggests that artistic quality has five components:

- **Technique.** Technical competence or sophistication.
- **Originality.** The newness of the content as well as the mode of expression.
- **Ambition.** The extent to which the art challenges creators and viewers to extend themselves beyond the norm.
- **Connection.** Relevance to the audience.
- **Magic.** Ability to provide non-rational responses, inexplicable and inexpressible reactions that stay with the audience.

We are not suggesting that you measure these five in your outcome evaluation (i.e. by getting participants to rate your project on them). However, it is helpful to think about which ones are most important to you during any quality monitoring that you do (i.e. by getting project managers or peers to evaluate your project on them). No one project can excel on all of these simultaneously.



There are three optional forms:

Quality form

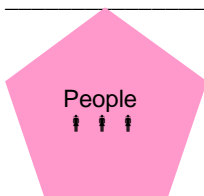
Observation Form

Artists/Project Deliver's Feedback Form

Sample questionnaires are given in Appendix Three.

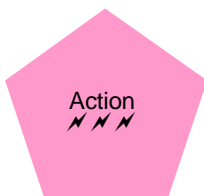
Quality Focus Group

You could use a focus group instead of a questionnaire. Focus groups can be useful for providing feedback on the quality of your project. Guidelines for conducting focus groups are given in Appendix Two. The discussion can be informal if you are a small group. However think about how you might want to change this as you grow. For example, you might want to have separate sessions for artists and project managers.



You need to revisit your People tasks during this stage:

- Encourage people to take part.
- Reassure them and encourage them to be honest. Explain the data will be confidential and only aggregate findings will be recorded.
- Ask for ideas of how they would improve the project.



There are two Action tasks:

Fine tune Your Project/Activity

Think about these questions:

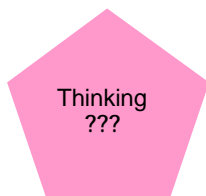
- **Is this the right activity for your organisation?** Does it match your resources and abilities? Does it match your ideas for where the organisation is going?
- **Are there any problems bubbling up?** Are people, resources or groups of participants being stressed? Is the project sustainable?
- **Are there long term tasks that are being neglected?** Arts organisations are often over-stretched which means there is little time for research, developing new projects, advocating for your sector, finding out about new sources of funding or strategic planning.
- **What have you learnt?** Are there any barriers to applying your new knowledge? How do you ensure the lessons are applied? Could your lessons help other arts organisations?

It is worth having an internal discussion about how the project should be **improved**. You can't improve all your work simultaneously. It is sensible to focus your effort. For example, you could identify two key improvements to make to your project if you re-run it.

You might like to give individuals responsibility for following up specific areas of improvement. This could include doing research on the Internet or talking to other arts organisations .

AT THE END OF THE PROJECT

Evaluate outcomes



Think About Your Outcomes

Outcome measurement sounds intangible and difficult but you don't need a high level of detail, so it is relatively straightforward. For example, it is enough to ask whether participants increased their confidence as a result of the project, not by how much their confidence increased.

The use of social outcomes is an attempt by funders to better match the objectives of arts organisations, to move away from a reliance on economic impact evaluation. It might sound mechanistic or instrumental, however, the voluntary and community arts do have strong effects on people. We hope that recording what already occurs can show the sector in a stronger light as well as opening some interesting discussions within the sector.

All outcome evaluation should involve talking to project participants. However, you might also like to collect information from artists and other session organisers, partners and funders. The toolkit assumes that organisations working with children will ask for views on outcomes from artists and other partners rather than from the children themselves.

You need to ensure that the effects can reasonably be said to come from your project rather than from other events in participants' lives. The approach that we have taken in the Outcome Questionnaire is to ask participants which effects come from your project. This is the simplest approach. You can also explore the role of your project by comparing participants' questionnaire responses before and after the project, and by using a control group (similar group of participants who did not take part in your arts project).

Projects often produce outcomes not anticipated in the funding proposal, positive and negative. Evaluation needs to be flexible enough to include these.

If you want to ask participants for their feelings towards the wider community then you need to think carefully about which community you mean. People might trust others in their local neighbourhood but not trust people across the whole city.

There are two optional forms:

Outcome Questionnaire

Sample questionnaires are given in Appendix Three. We have provided different forms for young people (11-16) and 17 and over.

Follow up Questionnaire

Arts organisations tell us that they do not have the resources to carry out follow up questionnaires. Therefore we have recommended that the Arts Council takes responsibility for the survey, which will be carried out through telephone interviewing. As with the Outcome Questionnaire a random sample of participants will be interviewed. This does not have to be the same people as interviewed earlier, so long as the two groups are comparable.

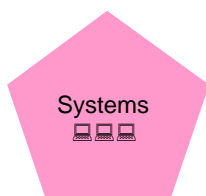
If your participants are younger than 11 then you can evaluate outcomes by asking for project workers to answer on their behalf:

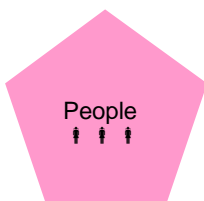
Artist's Evaluation Form

Teacher's/Youth Leader's Evaluation Form

Organisational Head's Evaluation Form

You should interview a sample from each of these three groups rather than just, say, artists, as this will give you greater confidence in your findings.





Revisit the People issues mentioned in the first section:

- Explain to those giving out the forms the importance of the information.
- Take the forms seriously.
- Encourage honesty.
- Collect a complete set of responses.
- Introduce the forms confidently. Don't be apologetic.



There are two Action tasks:

Interpret the Findings

How good is good? It is arguable that all outcomes from arts projects are a bonus. However, it can also be interesting to compare your project with other projects from your or other organisations. What evaluators tend to find is that different types of projects consistently produce different kinds of outcomes and no project excels on all outcomes.

Summary statistics can help you to compare your projects or your organisation with similar organisations, although they do not, of course, tell the whole story. You might like to look at unit costs, for example:

- **The average cost per participant.** The total cost divided by the number of participants.
- **The average cost per session.** The total cost divided by the number of sessions.
- **The average cost per outcome.** The total cost divided by the number of participants who experienced an outcome such as increased in confidence.
- **The Arts Council subsidy per participant.** The ACNI grant divided by the number of participants.
- **The Arts Council subsidy per session.** The ACNI grant divided by the number of sessions.
- **The Arts Council subsidy per outcome.** The ACNI grant divided by the number of participants who experienced an outcome such as an increase in confidence.

Unit costs need to be interpreted alongside other figures, especially average contact hours and levels of outcomes. High unit costs can be good (indicating intensive support) or bad (indicating low participation or waste of resources).

Look at the figures from the outcome evaluation and consider what they mean, for example:

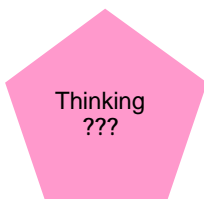
Were outcomes at a lower level than you expected?	Why?	Was this because the measurement didn't match your work, or because the take up/outputs were lower than expected, or because the quality was lower than needed?
Were outcomes of the kind expected?		Do you need to increase outreach? Do you need to fine tune publicity or delivery?
Were there unexpected negative or positive outcomes?		Do you need to expand your questionnaire to include unexpected positive outcomes? Do you need to change your project to reduce negative outcomes or to be more selective about participants?
Did some participants achieve higher outcomes than others?		Do you need to target your project at participants who gain the most from it?

Act on the Findings

Consider the following issues:

- **Value for money.** Are there ways you can increase the benefit without increasing the cost? Are there ways of decreasing the cost without decreasing the benefit?
- **Was your logic model accurate and complete?** Was the impact on the participants as expected? Were there any unintended positive or negative consequences?
- **Was the project implemented as planned?** Did the project reach targeted groups? If not, why not? Was the take up sufficient? If not, what could you do about it? Did partners do their bit? What were the critical success factors? What contextual factors helped or hindered the project? If the project was not implemented as planned, was this because of unanticipated problems?
- **What have you learnt?** What would you do differently next time? Most arts organisations have informal debriefing sessions. If you don't write the conclusions down then they might be lost. Evaluation gives a systematic form to do this. You can include recommendations about how funders can improve their programmes.
- **What is the role of the project?** What is unique about your project? Would the project suit other communities? Should it be rolled out or replicated?

Evaluate impact



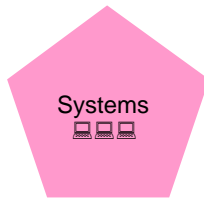
There are three elements of impact:

- **Organisational impact.** This is the impact of projects or activities on your organisation's skills, reputation, innovation and its financial sustainability.
- **Social impact.** This is the impact of projects or activities on the wider community, including but not limited to project participants and audience members.
- **Economic impact.** This includes the number of jobs created and income generated directly or indirectly from your organisation's work.

If you have collected the information the toolkit recommends then measuring impact should be relatively straightforward. You should have most of the data you need. What remains it to:

- **Add together your different projects.** This needs to be done without double counting, which is relatively straightforward as your data are kept at the individual level.
- **Take account of the role of other organisations.** You should not take the credit for their work. In practice outcome measurement doesn't claim that arts organisations have sole responsibility for the outcomes. Rather it claims that arts organisations **have contributed** to positive outcomes.
- **Consider external circumstances that affected the impact achieved.** These could be circumstances that contributed to or counterbalanced your achievements.
- **Link to wider research about the impact of the arts on non-participants.** The toolkit assumes that it is not the job of individual arts organisations to evaluate the overall impact of artistic activity on the wider community.

These issues are considered in further detail in the review that was prepared alongside this toolkit.



There are two Systems tasks:

Compiling Data for Social Impact

All the outcome measures in the Outcomes Questionnaire can be turned into performance indicators of the form "Percentage of project participants who had x outcome".

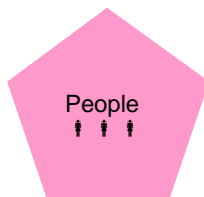
The Arts Council will compile three strategic performance indicators across organisations on:

- The percentage of participants in participative arts activities who increased in confidence (said that they increased in confidence as a result of the project).
- The percentage of participants in participative arts activities who increased in creativity (said that the project helped them to be more creative).
- The percentage of participants in participative arts activities who developed new skills (said yes to any of the skill options).

Compiling Data for Economic Impact

Economic impact is likely to be carried out by an external evaluator. However, there is a lot you can do to compile the data they need for their analysis, for example:

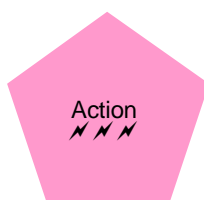
- **Keeping clear accounts of income and expenditure.**
- **Keeping figures on the people employed on your projects.** This information is on the Activity Form for Participation.
- **Noting whether your suppliers are local or outside your area.**



There is one People task:

Discuss Organisational Impact

Did the project develop or deplete your organisation's skills, partnerships and resources?



There is one Action task:

You might like to compare your results with other arts organisations to see if you can learn from each other. Evaluators tend to find that all projects have strengths and weaknesses.

APPENDIX ONE: REFERENCE

What are the types of evaluation?

Summative evaluation typically takes place at the end of your project and makes a judgement about the overall success of your work. If you think of goals as the overall effects you wish to achieve from your project, then summative evaluation examines your progress towards your goals. Summative evaluation typically looks at outcomes and impact.

Formative evaluation takes place during your project and provides feedback on whether you are making progress. If you think of objectives as the means to achieve your goals, then formative evaluation examines your progress towards your objectives. Formative evaluation typically looks at process measures, outputs and intermediate indicators.

What are the advantages and disadvantages of doing evaluation in-house versus using external evaluators

The advantages of doing evaluation in-house are:

- **Knowledge of internal culture and process.** You might have a better understanding of the information that you need as well as the practicalities of applying evaluation in your organisation.
- **Organisational learning.** Learning about evaluation techniques and insights gained from the evaluation stays in the organisation.
- **Commitment.** You might be in a stronger position to implement recommendations that come out of your evaluations.

The advantages of using external evaluators are:

- **Specialist skills.** An external evaluator might have long experience in tasks such as writing and analysing questionnaires.
- **Independence.** Reports produced by external evaluators might have greater credibility with funders.
- **Distance.** An outsider might bring a fresh perspective to your work.
- **Knowledge of other areas.** An external evaluator might know about good practice in other areas, whether in evaluation or project delivery.

In practice, your access to external evaluators is likely to be determined by your resources. If you wish to use external evaluators then you will need to build their fees into your budget from the beginning.

What are the strengths and weaknesses of different evaluation methods?

There are seven broad methods available. Which evaluation method is appropriate will depend on:

- The type of questions to be answered.
- The time available.
- The resources available.

- The technical skills of the evaluation team.
- The intended audience for the evaluation and what methods they consider credible.

Evaluation methods can be broadly classified into:

- **Quantitative methods.** Data that can be represented numerically.
- **Qualitative methods.** Narrative descriptions or images.

These are better thought of as two ends of a continuum rather than two discrete categories. Open questions, which are by nature qualitative, can be coded to produce quantitative data. Closed questions, which are by nature quantitative, can include space for comments. The two are complementary. Quantitative data helps with generalisation. Qualitative data helps with interpretation.

Arts organisations often feel that evaluation is mechanistic because it relies on numbers. There is an assumption that numbers are restrictive, simplistic and rigid, but this does not have to be the case. In fact, numbers can be deeply creative, radical, even anarchic. It is a matter of fact that the human brain works by simplifying reality: it sees what it expects to see or concentrates on the most vivid or recent occurrences. Numbers can help us see past our own expectations or experiences. When properly used, numbers tell the story as it is. Numerical data helps organisations to detect trends or occurrences that are not obvious on their own. Thus, instead of just drawing attention to what the most vociferous participants think, numbers can tell an organisation what the silent majority think.

There are usually trade-offs between breadth and depth. All methods have strengths and weaknesses. Ideally you should use two or more methods which have complementary features. This is described as “triangulating” on the research subject because it gives you different perspectives, rather like taking spatial measurements from two different points.

The task lists given in this section do not include the generic tasks, such as notifying respondents, which are relevant to all evaluation methods.

Observation

Observation is a holistic method that can give the evaluator a vivid picture of the operation of a project, especially with regard to group behaviour. The complexity of observation is a weakness as well as a strength. Some form of evaluation questionnaire is helpful to steer observation. Otherwise there is a distinct risk that different observers would come to different conclusions (low reliability).

Strengths and weaknesses of using observation

Strengths	Weaknesses
Dense information source	Small sample of behaviour
Immediate	Lack of understanding of preceding events: can be difficult to interpret or categorise seen behaviours
	Reliance on observer's skills
	The visit alters behaviour (the Hawthorne Effect)

The tasks in organising an observation session are:

- Consider the aims of the observation sessions and the information that you would like to obtain. It might be helpful to think about what you would expect to see (good behaviour) and what you would not expect to see (bad behaviour).
- Consider the number of sessions that you would like to have observed and the length of observation. This is likely to be determined by your resources.
- Think about a general sampling framework: whether you would like to include different types of activities, different staff members, different types of participants or different times of year.
- Notify the session organisers about the planned observation and think through the logistics, for example, whether the observer should take an active part in the session.
- Produce an observation schedule. Drafts are given in Appendix Three.
- Observe the session and take notes during or immediately after the session.
- Discuss any queries or other relevant issues with the session organiser.
- Produce a short summary of the findings from observation sessions over a set period of time e.g. six months or a year.

Written or emailed surveys

Written surveys are useful for compiling simple factual information across a relatively homogeneous population (homogenous in terms of background or outcomes). They are particularly successful where the subject is well understood so that the questions can be coded. They are not applicable for complex or conceptual issues. Nor are they suited to situations where respondents vary widely and would therefore need to answer different parts of the questionnaire. The response rate can be maximized by personalising the letters and questionnaires (including the name of the person addressed and a reference to the event or project covered), including stamped addressed envelopes, and issuing at least one reminder letter or email. Written questionnaires should always be tested using a small pilot survey, which can be administered face-to-face. Postal surveys demand more skill in questionnaire writing than telephone or face-to-face surveys because they lack the opportunity to check responses with respondents.

Strengths and weaknesses of using written surveys

Strengths	Weaknesses
Cheap	Low response rate
Large numbers do not greatly increase the cost	Biased response
Provide uniform information	No assurance the questions were understood
Data entry is simple	No assurance the addressee was the one who replied
Can be anonymous	Responses can be difficult to interpret
Self-administered	People often express themselves better orally than in writing
	Limited personal contact to motivate a response
	Assume a level of literacy

The tasks in organising a postal survey are:

- Consider the aims of the survey and the information that you would like it to address.
- Check your contact details for planned respondents. Correct any information that is incomplete or out of date.
- Draft the survey questionnaire.
- Pilot the survey questionnaire by getting three or four potential respondents to fill it in and then tell you if the questions were clear, applicable and in the right order.
- Amend the survey questionnaire with insights from the pilot.
- Write a covering letter explaining the aims of the survey and the purpose to which information will be put. Include reassurances about confidentiality.
- Copy and post/distribute the survey questionnaires. Consider including stamped addressed reply envelopes.
- Send out a reminder, as appropriate.
- File and number questionnaires as they come in.
- Produce a database structure, enter and analyse the questionnaires.

Face-to-face surveys

Face-to-face surveys provide detailed, personal interaction with interviewees. This is a strength because of the potential for empathy and probing to explore answers and a weakness because of the scope for personality conflicts and manipulation. Face-to-face surveys are expensive and best applied when the number of people to interview is relatively small or concentrated in one area.

Strengths and weaknesses of using face-to-face surveys

Strengths	Weaknesses
Personalized	Expensive
In depth, free response	Time consuming
Empathy can motivate a longer and more complete discussion	May intimidate some groups
Flexible and adaptable	Open to manipulation by the interviewer
Gives visual cues	Vulnerable to personality conflicts
Can combine open questions with pre-coded responses	Requires skilled interviewers
	Might be difficult to summarise findings
	Might involve the interviewer travelling to unsafe areas

The tasks in organising a face-to-face survey are:

- Consider the aims of the survey and the information that you would like it to address.
- Consider whether you need a full response or a sample and if the latter, what size sample is appropriate. All samples must be random (e.g. every 10th participant) not personally selected.
- Draft the survey questionnaire.

- Pilot the survey questionnaire by getting three or four potential respondents to fill it in and then tell you if the questions were clear, applicable and in the right order.
- Amend the survey questionnaire with insights from the pilot.
- Fix appointments with the planned respondents and carry out the interviews. You should take full notes during the interview to complete the questionnaire but also record any vivid comments and new issues raised.
- Check the questionnaire at the end of each interview to ensure that all questions are answered and the writing/coding is intelligible.
- Produce a database structure, enter and analyse the questionnaires.

Telephone surveys

Telephone surveys combine some of the advantages of postal surveys (relatively low cost) with some of the advantages of face to face interviews (personal interaction).

Strengths and weaknesses of using telephone surveys

Strengths	Weaknesses
High response rate	Can be difficult to contact people
Empathy can motivate a longer discussion	Problem with time differences
Scope for checking meaning	Inappropriate for people without telephones
Scope for following leads	Inappropriate for children and non-English speaking people
Cheaper than face to face	Respondents might lack privacy
Interviewee is relaxed in their own environment and tends to be more candid	
Lead-in time to start the survey is short	
Contact with the interviewee is used productivity rather than in chasing up written forms	
Can combine open questions with pre-coded responses	

The tasks in organising a telephone survey are:

- Consider the aims of the survey and the information that you would like it to address.
- Draft the survey questionnaire including introduction and confidentiality undertaking.
- Pilot the survey questionnaire by getting three or four potential respondents to fill it in and then tell you if the questions were clear, applicable and in the right order.
- Amend the survey questionnaire with insights from the pilot.
- Telephone the respondents. If you are telephoning using a random survey, make at three attempts to telephone each numbered respondent. Track planned interviewees if their contact details appear to be out of date.
- Check the questionnaire at the end of each interview to ensure that all questions are answered and the writing/coding is intelligible.
- Produce a database structure, enter and analyse the questionnaires.

Focus groups

Focus groups collect data through group interaction on a topic determined by the researcher. Focus groups provide an excellent method for seeing how your clients think and what issues are important to them. They help to generate questions but not answers. Results need to be tested using a larger survey to produce generalisations. The group setting means that individuals have to wait for a time to talk which can reduce rather than increase the number of ideas generated. The value of focus groups is strongly affected by the skills of the facilitator.

Strengths and weaknesses of using focus groups

Strengths	Weaknesses
Group interaction	Small sample
Group consensus	Not representative/random
In depth discussion	Responses are not independent: Group format fosters conformity: differences might be suppressed or polarized Vulnerable to manipulation by a skilful member. Affected by group cohesion (compliance, identification, internalization)
More efficient than one-to-one interviews	Questions are not asked the same way each time/research method is not replicated
Democratic process in having the researcher/moderator outnumbered by the participants	Difficult to quantify
Relatively immediate	Not suited to potentially sensitive issues

The tasks in organising a focus group are:

- Clarify the purpose and questions to ask.
- Think about the number of focus groups to run.
- Decide on and invite participants. A general guideline is to have eight to ten participants per focus group.
- Book a room. It should be accessible, of the right size and private. The group should not be disturbed during the session.
- Organise and brief the facilitator.
- Organise and brief the note-taking.
- Organise the room. Ensure that seating promotes group discussion e.g. in a circle. If some people do not turn up remove empty seats.
- Ensure the meeting starts and finishes on time. You might like to set some ground rules for the group, for example, participants should talk to each other not the moderator, there should be only one conversation at a time and everyone should have a say. Remember that the role of the meeting is to understand how the participants think and what matters to them, not to reach a consensus.
- Analyse the results. Describe the nature of the discussion and identify patterns or themes. A summary should be written from this account, not from memory. It is better to write up notes from the meeting while the impressions are still fresh rather than some time later.

Case studies

Case studies provide a detailed and real world method that is complementary to wider, shallower methods such as postal or telephone questionnaires. They can show how processes work over time and therefore provide insight into causation. There are two types of case studies used in evaluation.

- Detailed case studies can be used to provide a holistic picture of projects, especially to check the mechanisms whereby effects were achieved.
- Brief case studies can be used to illustrate evaluation reports by giving vivid examples.

Organisations or individuals are usually chosen for case study because they are interesting or exceptional in some way. Subjects are not usually typical (representative) and therefore case studies should not be used to make generalisations about the wider group.

Strengths and weaknesses of using case studies

Strengths	Weaknesses
Multi-faceted: can show different perspectives	Time consuming
Vivid	Expensive
	Anecdotal

The tasks in producing case studies are:

- Identify criteria for case studies. For example, the issues or subject areas that you wish to illustrate.
- Draft a structure for the case studies. This should include the headings under which text will be presented and the questions that need to be asked to generate the information needed.
- Produce a long list of possible case study individuals/organisations.
- Produce a grid of each possible case study against the selection criteria.
- Select a shorter list of case studies that covers the selection criteria.
- Contact the short list individuals/organisations and check that they are interested in being interviewed. Fix specific dates for the interviews. Offer any reassurances that they need, such as that they can see and comment on a draft of the text. For longer case studies, any written or visual material needed could be requested at this stage.
- Interview the case study individuals or organisations, being careful to take notes of the conversations. Check over your notes immediately after the interview to ensure that all key points are included.
- Write up your notes into the case study structure.
- Send your draft case studies to the subjects for comment.
- Include any comments that do not distort the meaning. Any factual errors should be corrected, but the neutral tone of the text should be maintained.

Art works, video and film

Art works, video and film can provide evidence of the achievements of a project. Visual materials are vivid, but not always easy to interpret. They can be enhanced by some form of structure or commentary that explains how the group worked, the role of the artists versus the participants and the level of skill that participants had before joining the project. They can also be more effective if kept short.

Strengths and weaknesses of using video and film

Strengths	Weaknesses
Vivid	Expensive
Consistent with artistic values	Impression can be affected by the quality of filming rather than the quality of the project
Motivating for participants	Time consuming
	Dependent on the skills of the viewer

Checklist of tasks for producing video or film evidence:

- Obtain the necessary permissions from individuals you are planning to film.
- Consider including an introduction describing the content and summarising the main conclusions from the video. This will motivate the viewer to look at the video and provide them with key information if they do not watch the whole thing.
- Consider including interviews with key stakeholders rather than just a film of the final presentation.

Records

Records are existing sources that have been compiled for internal management uses. Examples include application data and client databases. Arts organisations are not likely to use records as a source of information for their evaluation: this heading is included purely for the sake of completeness.

Records can be useful for giving background information. At their best they give an historical series of data that is difficult for an evaluator to compile after the event. At their worst they are inflexible, incomplete, inconsistent and subject to hidden rules about how the data are recorded.

Strengths and weaknesses of using records

Strengths	Weaknesses
Cheap	Often incomplete, inaccurate and out of date
Time series	Not usually compiled for this purpose
Non reactive	May have confidentiality restrictions
Do not interrupt the project	Changing rules might make comparison invalid
Set down at the time of the project not retrospectively	Can be misleading unless the rules are explained
	Factual only: no values or attitudes

The tasks in using records are:

- Check that you understand the purpose for which the records were compiled and any limitations that arise from this intended purpose.

- Look through each field of data in order to identify any gaps or anomalies.
- Produce tabulations for each field of data.
- Allow time to read and reflect on the tables.
- Produce cross-tabulations for any areas of particular interest in the data.

How do I write questionnaires?

Questionnaires are helpful for all evaluation methods. Following up or clarify comments made by respondents can be useful, but a totally free form interview can end up concentrating on recent or memorable issues and thereby miss out other important subjects, (for example those that are taken for granted).

Questionnaires ensure that:

- You are clear about which issues you wish to investigate.
- Questions are not missed out by accident.
- Each individual or group is interviewed in the same way.

There are four stages in writing a questionnaire:

- Think about the issues that you need to investigate.
- Translate issues into questionnaires.
- Fine tune each question.
- Check the layout and presentation of the questionnaire.

Defining evaluation issues

Evaluation issues should be:

- **Important.** It is better to address a few key issues well rather than to dissipate energy attempting to pursue all the issues relevant to your project.
- **Precise.** It might take some time to see the exact issue that you want to investigate. For example, a question “did we reach our target participants?” might be honed down to a question “did boys join and stay with our project?”
- **Relevant to you.** Some of the broader or more theoretical questions might be better answered by Arts Council research or by a joint evaluation project shared by several arts organisations.
- **Actionable.** Think about what you will do with the answers. Don’t ask for information that you can’t use.
- **Rounded.** Include “why” and “how” questions as well as “what” and “how many”.

Translating issues into questions

The issues that you want to investigate need to be translated into questions to be posed to interviewees. All evaluation methodologies benefit from a clear

understanding of the questions to be answered. Guidelines for translating issues into questions include:

- **Write questions from the point of view of the respondent.** Ensure the wording and focus is related to their objectives. Don't ask respondents to express an opinion on which they have no evidence. It is generally not good practice to ask respondents to tell you their opinion of the opinions or experiences of other people. The exception to this rule is for teachers in educational projects.
- **Use mainly closed rather than open questions.** A list of specific questions about the project is better than one question about "What did you like about the project". The latter is ambiguous and dependent on the perception, memory, character and mood of the respondent. Closed questions provide more usable information and are faster for the respondent to complete. Include one or two open questions at the end, such as what they liked or what they think should be changed, so that you can find out about any issues that you might have missed in the specific questions.
- **Keep the questionnaire short.** One to two pages should be sufficient.

Writing questions

A good question is one that is insightful rather than trivial, and one that can be communicated precisely to the people from whom an answer is expected. Check each question against this checklist:

- **Ensure questions are clear.** Do not use double negatives. Do not use questions with complicated qualifications. Do not use jargon or abbreviations. Use plain English.
- **Ensure questions are precise.** Do not ask about two things at the same time. Give time periods if necessary.
- **Ensure questions are relevant to the respondent.** Do not use questions based on suppositions. Do not use questions that assume respondent have knowledge that they might not have. Do not ask respondents to speculate about other people's attitudes or behaviour (except for youth arts).
- **Ensure questions are simple.** Do not ask respondents to perform calculations – ask for the data and calculate the sums yourself. Do not ask questions requiring generalisation or memory. Do not ask questions that require respondents to summarise events that happened over a long period of time. Do not ask questions that require respondents to remember events that happened a long time ago.
- **Ensure questions are neutral.** Do not use loaded questions. Do not infer that a particular answer is expected. Always keep response codes balanced (an equal number of positive and negative codes).

Balanced response codes

29. Would you like to be involved in more of the organisation's projects?	Definitely yes Probably yes	Definitely no Probably no
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Imbalanced response codes

29. Would you like to be involved in more of the organisation's projects?	Definitely yes Probably yes	No Don't know
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Proof read the questionnaire. Get other people to read it through to check that it isn't ambiguous. You should also pilot the questionnaire: ask three or four participants to fill it in and then tell you whether the questions seemed clear, appropriate and complete. Piloting is necessary:

- To check that the questions produce the information needed.
- To check that interviewees understand the questions.
- To check that the questionnaire can be applied in the context intended. E.g. how long it takes.

Checking the layout and presentation of the questionnaire

It is important that you obtain complete questionnaires where each question is answered and respondents are motivated to reply honestly and with thought.

- **Introduce the questionnaire.** Motivate respondents to complete the questionnaire. You should explain why the information is important: generally that it will help your organisation to improve. You should also reassure the respondent that individual responses are confidential.
- **Number the questions.** This makes it easier for the respondent to see when they have missed out a question.
- **Number coded questions.** The data entered can then type in responses straight from the questionnaire.
- **Ensure the respondent has enough information to answer each question.** Tell the respondent whether they should tick one answer only, tick all answers that apply to them or write an answer in the box.
- **Ensure the order is appropriate.** A common approach is to start questionnaires with factual, uncontentious subjects that get the interviewee talking/thinking, then to move on to more intangible questions about feelings or attitudes and finish with personal/demographic questions which are often perceived as boring or intrusive.
- **Ensure that you have routed respondents past irrelevant questions.** If an answer to one question renders the rest of that section irrelevant then direct the respondent to the next section.
- **Ensure that there is enough room for responses.** This is especially the case for open questions.
- **Ensure the structure is logical.** Group similar questions together. Ask general questions after specific, so that you have already led the respondent to think about the issue before putting forward overall views.

- **Ensure the questionnaire is easy to read.** Avoid changing the response type. If you are going to use “agree” “disagree” as well as “yes” “no” responses codes then try not to skip back and forth between the two.
- **Check page breaks.** Do not break questions in the middle.
- **Thank the respondent.**
- **Remind the respondent about how they can return the questionnaire.** Even if you are planning for respondents to fill the questionnaire during a session, you should still include your address on it in case they take the form home.

The layout we use is designed to simplify data entry: the person entering the data onto the computer only has to read the right hand column instead of having their eyes darting all over the page.

How do I draw a sample?

The toolkit assumes that all samples should be random. Random sampling reduces the bias in your survey and therefore reduces the need to interview large numbers of participants.

The procedures for drawing a random sample are:

- Decide on the total number of responses that you would like. This should take account of your resources, but also of the types of questions you would like to ask. If you would like to compare different groups of participants (e.g. different ages, sexes, projects) then you ideally need to have at least 30 respondents in each sub-category.
- Translate the number of responses into a number of questionnaires or interviewees. Postal surveys can have very low response rates, so you might need to send out 5 or 10 times the questionnaires you need. Telephone surveys have high response rates and you only need 2 times the target response number on your contact list.
- Select your contact list randomly. For instance, if you have twice as many participants as you need to contact then choose every second participant or every other project.
- Make three or four attempts to contact each person on your contact list.
- When you have finished the survey, compare the characteristics of your sample with the total population of participants. For example, does your sample have more older participants in it? If younger participants are under-represented in your survey, then this will affect the kind of claims that you can make about your results.

How do I analyse data?

Analysing data is a bit like doing a jigsaw puzzle in which the pattern gradually emerges. There are five stages to analysis:

- **Enter the data.** It is relatively easy to construct a spreadsheet with columns for questions and rows for respondents. If you have pre-coded your responses then all you will need to do is to key the response code (response a,b or c etc) into the spreadsheet or database. Open questions

might need to be classified before they can be recorded, or to be summarised as a text field.

- **Clean the data.** Read through the questionnaires and check for any answers that are inconsistent or unlikely. If there are anomalies then check the questionnaires to see if this is a coding error.
- **Analyse the data.** You might have to analyse the data in stages. Start by producing tabulations and averages. These might suggest further questions, such as whether some types of sessions were more likely to produce some types of outcomes. You can follow these questions by doing cross tabulations. Be careful that you have enough data in each subgroup. A rule of thumb is that a minimum of 20 cases is needed in each subgroup.
- **Reanalyse the data.** Note any new ideas, patterns or themes in the first analysis, for example, whether different groups hold different views, whether different outcomes peak at different times in the project or whether different types of participants have different outcomes. You might want to follow these up with further analysis.
- **Present the data.** You should include tables of the survey data, whether in the main report (for key issues) or in an appendix (for background questions). Provide enough information for the reader to understand the data. For example, you should state the number of respondents to each questions. Avoid using percentages where the total number of respondents is less than 20. You can use quotations of comments made by interviewees to communicate key points in the data.

Don't throw away the data after the report has been written. You might like to re-analyse the data in the future as new issues emerge.

How do I write an evaluation report?

Evaluation reports need to be clear, coherent, rigorous and concise. You need to think about the style, content and process.

Style

With a bit of effort you should be able to write an evaluation report that looks professional. Here are a few guidelines on style:

- **Be precise.** Use the active not the passive voice: say "the project co-ordinator ran a follow up session" not "a follow up session was run". In the second the reader is left wondering if your organisation or someone else ran the follow up session. Avoid vague terms like "some".
- **Concentrate on fact.** Describe what happened clearly. Keep speculation about what might have happened or will happen in the future to a separate part of the report. If the two are mixed up the reader might lose sight of what you actually did.
- **Be balanced.** Totally positive reports are not credible. Don't forget to celebrate the strengths of your project in full – don't take them for granted. However, also be honest about the weaknesses of your project. Explaining

problems that you have had can be one of the best ways of arguing for increased funding.

- **Don't shy away from using numbers.** A little quantitative information can be vivid and can save you a lot of writing. Evaluation reports work best where they combine numbers and discussion.
- **Respect confidentiality.** Make sure that quotations or comments cannot be traced back to individual respondents. If there is a possibility that respondents could be identified, then you should get their permission to include their comments.
- **Depersonalise criticism.** Talk in terms of the tasks and outcomes that were not achieved, not the people who failed. There are many reasons for outcomes to be missed that are not connected to the individuals concerned (for example, poor project logic, resource constraints and changes in the environment).
- **Integrate data sources.** Your main report should bring together findings from different evaluation methods to address your research questions. Use both figures and words to describe your findings.
- **Reconcile inconsistencies.** Sometimes different evaluation methods yield different results. Where this happens, you should give an explanation for the discrepancy, whether due to weaknesses in one set of data or differences in the circumstances of the two sets.
- **Take a dynamic view.** Evaluation tends to take a snap shot at one period in time. In your interpretation, you should place this snap shot in context. Remember that many of the subjects you are measuring, especially outcomes, change over time. Some outcomes (such as confidence) tend to go down during a project, as participants increase in self awareness and raise their aspirations, and then peak at the end of the project, especially after a final performance. Some outcomes (such as social outcomes) take time to build up and might peak some time after the project has finished.
- **Use your logic model.** You might like to consider where in the chain of reasoning any weak links lay. For example, was the project not implemented as planned because of resource constraints or were the outcomes not achieved because the logic was faulty?

Content

There are really only four broad questions that you need to answer in your evaluation report:

What did you do?

You need to describe what you did and what other partners did.

This section could include:

- What were the objectives for the project?
- What were the needs that the project was intended to address?
- Who was involved in the project?
- Who organised the project?

- Who initiated the project?
- Who funded it?
- What was the project?
- When did the project take place?
- What activity was carried out?
- What were the resources (financial and non financial) involved in delivering the project?

What did you achieve?

This should be mainly about the benefits to participants, but also include benefits to your organisation such as capacity building.

This section could include:

- How many participants took part?
- What was the profile of participants (age, sex, location, ethnicity, indicators of social exclusion)?
- What were the outcomes for participants?
- Did some participants benefit more than others?
- How were these outcomes achieved?
- Were any problems experienced in delivering the project?

What is the evidence for those achievements?

This should consider the evidence that benefits are due to your project rather than to other events that happened to the participants. You don't need to have a complicated experiment with control groups to prove cause: it helps if you can explain the mechanism for the effect: what it was about your project that produced the stated benefits.

This section could include:

- What evaluation was carried out?
- How were outcomes measured?
- How were data analysed?
- How were the data interpreted?
- What are the conclusions from the evaluation?
- What steps did the evaluation take to avoid bias?
- What are the limitations on the evaluation methods?

What are the implications for future work?

This could include:

- Were the objectives appropriate? Did they change during the project?
- Was take up as high as it should have been? If not why not?

- What key decisions were made in the project? What criteria were applied? In retrospect, should different criteria have been applied or the same criteria applied differently?
- What was good about the project?
- What lessons should be applied in future projects?
- Where there further questions that the evaluation could not answer? Is further work needed?

You should include a summary that picks up the key points in this list. You can include copies of survey questionnaires, data tables and lists of organisations consulted (if relevant) in appendices.

Process

It is worth producing a draft and getting colleagues to comment on it.

How do I disseminate an evaluation report?

General guidelines are:

- Evaluation reports should be freely available. For example, if you have a website, you might like to make full reports or summaries available on your website.
- Customise reports to different audiences.
- Deliver reports in time to be useful.
- Use different media, for example conference presentations and workshops as well as written reports.
- Use partners' communication media, for example include a summary of your evaluation in their newsletters.
- Remember to communicate your findings to respondents who participated in your evaluation. This is courteous and helps to ensure their cooperation in future work.

What Is a good evaluation?

A good evaluation should be:

- Meaningful.
- Accurate.
- Fair.
- Useful.
- Practical.

The last four of the five headings map onto the criteria advocated by the American Program Evaluation Standards (*Joint Committee on Standards for Educational Evaluation*, 1994): accuracy, propriety, utility, and feasibility.

A good evaluation is meaningful

Evaluation should focus on the most important and topical issues facing the organisation, not just the ones that are easiest to measure. A good evaluation helps the organisation to think about what they are doing, the assumptions they are making, and the different perspectives of different stakeholders. A good evaluation is clear in its thinking.

You can help to make the evaluation meaningful by:

- **Thinking about why you are doing the evaluation.** It is not a good use of money to employ evaluators for questions if the answers will not change the organisation's way of working.
- **Being focused in your objectives.** Evaluations tend to work best if they focus on a small number of connected issues rather than a ragbag of unconnected issues.

A good evaluation allocates time for thinking about which questions should be explored before starting the research.

A good evaluation is accurate

Accuracy standards require an evaluator to base their conclusions on sound information. To meet these standards, you should:

- **Describe your methods in your evaluation report.** The methods and findings of the evaluation should be presented in enough detail in the report so that the adequacy of information can be judged. It is not sufficient to present the conclusions without explaining how they were derived.
- **Choose and apply methods to ensure the validity and reliability of data.** You should not place reliance on biased, partial or spurious data. Survey data should not be derived from a small or biased sample. Questions should not be leading or loaded.
- **Analyse the findings systematically.** Each piece of information should be examined and interpreted.
- **Explain and justify conclusions.** You should describe your conclusions separately from your findings in such a way that the link between the two is evident.
- **Report findings and conclusions impartially.** The language or presentation of the report should not presuppose a particular conclusion.

A good evaluation has a logical track from the choice of methods, through the results to the conclusions.

A good evaluation is fair

Propriety standards require evaluators to be lawful and ethical, respecting the rights of people involved in the evaluation.

You should:

- **Respect the dignity of human subjects.** Evaluators should not be adversarial or blinkered.

- **Report the conclusions in a fair and balanced manner.** Most activities have strengths and weaknesses. An evaluation report should comment on both.
- **Deal with any conflict of interests openly and honestly.** Evaluators should not hide or ignore any conflicts of interests they have in evaluating the organisation.

Evaluations are expected to draw their conclusions independently, without any external pressure.

A good evaluation is useful

Utility standards require evaluators to be informative, timely and influential.

A good evaluation:

- **Considers the intended use for the report from the beginning.** For instance, the evaluator should ask about whether the report is aimed to provide general insight about the area of activity, or specific guidance about improving practice.
- **Keeps the client informed about decisions and emerging issues in the evaluation.** A “no surprises” approach works best.
- **Presents relevant information clearly and in a timely fashion.**
Recommendations should be practical and able to be implemented.

It is good practice to provide different presentations of the evaluation for different audiences.

A good evaluation is practical

Feasibility standards require evaluations to be realistic, prudent, diplomatic, and economical. They specify that evaluators should cause the minimum disruption to the program being evaluated, should be sensitive in their involvement of stakeholders, and should be mindful of the cost of the methods they are proposing.

APPENDIX TWO: OBLIGATORY QUESTIONNAIRES

You should customise these questionnaires by putting the name of your project and your organisation instead of “The project” and “The organisation”. You might also like to change the font size to make the questionnaires easier to read. If you amend the questionnaires please check the page breaks before you print the questionnaires: you should never break a question in the middle.

Obligatory questionnaires are needed to collect performance indicators for the Arts Council.

Activity Forms must cover all of the work that your organisations carries out with any Arts Council funding.

NOTES FOR THE ORGANISATIONAL FORM

The Organisational Form gives background information that enables the Arts Council to understand the results from different types of arts organisations, for example to different art forms, sizes or ages of organisation.

You only need to fill the form in once. Thereafter, you only need to update fields that have changed.

ORGANISATIONAL FORM

1. Name of organisation		
2. Date of establishment		
3. Art form	<ul style="list-style-type: none"> a. Music b. Drama c. Dance d. Literature e. Visual arts and crafts f. Film and video 	<ul style="list-style-type: none"> g. Architecture and murals h. Traditional arts i. Combined arts j. Other, please specify:
4. Type of organisation	<ul style="list-style-type: none"> a. Mainstream b. Community and voluntary c. Amateur 	
5. Legal structure	<ul style="list-style-type: none"> a. Unincorporated club or association b. Company limited by guarantee c. Company limited by shares d. Recognised charity e. Trust f. Local Authority g. Other, please specify: 	
6. District Council of home base	<ul style="list-style-type: none"> a. Antrim b. Ards c. Armgagh d. Ballymena e. Ballymoney f. Banbridge g. Belfast h. Carrickfergus i. Castlereagh j. Coleraine k. Cookstown l. Craigavon m. Derry n. Down 	<ul style="list-style-type: none"> o. Dungannon p. Fermanagh q. Larne r. Limavady s. Lisburn t. Magherafelt u. Moyne v. Newry and Mourne w. Newtownabbey x. North Down y. Omagh z. Strabane Other, please specify:
7. Parliamentary Constituency of home base	<ul style="list-style-type: none"> a. East Antrim b. North Antrim c. South Antrim d. East Belfast e. North Belfast f. South Belfast g. West Belfast h. North Down i. South Down j. Fermanagh/South Tyrone 	<ul style="list-style-type: none"> k. Foyle l. Lagan Valley m. Londonderry East n. Newry & Armagh o. Strangford p. Mid Ulster q. Upper Bann r. West Tyrone s. Other, please specify:
8. Type of organisation	<ul style="list-style-type: none"> a. Gallery b. Producing venue c. Receiving and producing venue d. Touring company e. Festival f. Community arts organisation g. Disability arts organisation h. Publisher i. Umbrella/arts resource organisation j. Other, please specify: 	

9. Total number of staff (full time equivalents)	
10. Number of full time artistic staff	
10. Number of part time artistic staff	
11. Number of full time executive staff	
12. Number of part time executive staff	
13. Number of other full time staff	
14. Number of other part time staff	
15. Number of volunteers	
16. Number of staff who are disabled	
17. Number of staff from ethnic minority groups	
18. Is the organisation or its programme disability led?	a. Programme disability led b. Organisation disability led

NOTES FOR THE SUPPORT SERVICES FORM

The Support Services Form has been introduced to ensure that the Arts Council has some account of the work carried out by umbrella and other organisations, which will not show up in the Activity Forms.

SUPPORT SERVICES TO ARTISTS OR ARTS ORGANISATIONS

1a. Number of individual members	
1b. Number of organisational members	
2. Number of artists supported	
3. Support services provided to artists	<ul style="list-style-type: none"> a. Advice b. Talks/lectures c. Training d. Website(s) e. Premises f. Residencies arranged g. Advocacy h. Other, please specify:
4. Number of enquiries dealt with	
5. Number of talks/lectures	
6. Number of organisations/individuals receiving a newsletter	
7. Number of courses	
7a. Number of participants who attended courses	
8. Number of hits to website(s)	
9. Number of artists provided with premises	
10. Number of residencies arranged	
11. Value of resources levered into the sector	

NOTES FOR THE FINANCIAL FORM

The Financial Form consolidates information formerly required in financial returns to the Arts Council.

FINANCIAL FORM

Expenditure	
<i>Core costs</i>	
1. Administrative salaries	
2. Rent and rates	
3. Light and heat	
4. Maintenance, security, etc.	
5. Telephone and fax	
6. Printing, postage, stationery	
7. Financial costs	
8. Insurance	
9. Other (please details)	
<i>Programming costs</i>	
10. Artists costs	
11. Volunteer expenses	
12. Publicity, marketing	
13. Catering merchandising	
14. Transportation	
15. Travel, accommodation, subsistence	
16. Equipment, materials	
17. Other (please detail)	
Total costs	
Income	
<i>Income from grants</i>	
1. Arts Council of Northern Ireland (ACNI): revenue	
2. Arts Council of Northern Ireland (ACNI): lottery	
3. AnChomhairle Ealaion	
4. Department of Culture, Arts and Leisure (DCAL)	
5. Local authority subsidy	
6. European Commission	
7. Other grants	
<i>Earned income</i>	
8. Box office	
9. Domestic touring	
10. International touring	
11. Membership fees	
12. Book sales	
13. Publications	
14. Gallery sales	
15. Bar/catering sales	
16. Rent from tenants	
17. Service provision	

18. Training	
19. Other earned income	
<i>Total earned income</i>	
<i>Contributed income</i>	
20. Sponsorship	
21. Donations	
Total income	
<i>Total capital income</i>	
22. Arts Council of Northern Ireland.	
23. Other capital	
24. Total income	

NOTES ON THE ATTENDANCE SHEET

The individual form is necessary for all projects where 90% of the participants are over 17. A random sample of these individuals will be included in the Arts Council's Follow up Survey.

NOTES FOR THE ACTIVITY FORM FOR PARTICIPATION

You should complete enough Activity Forms to cover all of your participative work. If your work falls naturally into projects then you should complete one form for each project. If your work is more continuous, and is not composed of projects, then you need to think about how to define units of activity: these could be according to time periods (terms) or structure (partnerships).

The Activity Form for Participation should be completed by the person who is running the session, or by any other member or staff or volunteer who is present during the session. The same person could complete the Activity Evaluation Form and any quality forms you are using.

It is important that forms are completed during the session when events are fresh, rather than afterwards. You should check the form at the end of the session to ensure that it is complete.

This simple form produces a great deal of interesting information, for example:

- The art form representation of your projects.
- Number of events.
- Number of participants.
- Number of participants from socially disadvantaged areas.
- Number of events in non arts venues.
- Numbers of events targeted at priority groups.
- Audience numbers.
- Average contact hours per participant.
- Staff ratios for sessions.
- Average number of sessions per project.
- The percentage of your projects that are cross community.
- Unit cost per participant.
- Your dependency on the Arts Council.

ACTIVITY FORM FOR PARTICIPATION

1. Name of organisation			
2. Name of project			
3. Art form(s) of project (<i>Please tick all that apply</i>)	a. Music b. Drama c. Dance d. Literature e. Visual arts and crafts f. Film and video	g. Architecture and murals h. Traditional arts i. Combined arts j. Other, please specify:	
4. Venue(s) for the project	a. School b. College of further or higher education c. Youth club d. Other community org. e. Library	f. Museum g. Theatre h. Gallery i. Other arts venue j. Other venue, please specify:	
5. Post code of venue			
6. Post code of target community			
7. Start and end dates for the delivery of the project	Start:	End:	
8. Total number of sessions			
9. Total contact hours per participant (number of hours times number of sessions)			
10. Number of staff present in the sessions:	Present:		
	All of the time	Most of the time	Some of the time
10a. Number of artists			
10b. Number of administrative staff			
10c. Any partner staff present			
11. Target number of participants			
12. Actual number of participants			
13. Age group of participants:			
Number below 11			
Number 12 -16			
Number 17 -24			
Number 25 - 39			
Number 40 -59			
Number 60 -79			
Number 80+			

14. Any targeting	a. socially/economically deprived groups b. Rural groups c. Ethnic minorities d. Offenders	e. People with disabilities f. Victims g. None h. Other, please specify:
15. Any methods to support access	a. Outreach b. Group targeting c. Childcare d. Affordability e. Help with transportation f. Publicity available in different languages g. Publicity available in different formats	h. Accessible venue i. Use of sign language/speech to text j. Support worker costs k. Sensory interaction l. Audio described m. None n. Other, please specify:
16. Any capacity building techniques used	a. Active participation b. Skill building c. Basing work on participants ideas/issues d. Sense of place e. Building group identity	f. Giving the group ownership of the product g. Leaving a legacy of equipment for future work h. Participants passing on their skills to the community
17. Religion of participants	a. All Catholic b. All Protestant c. Mainly Catholic d. Mainly Protestant	e. Cross community f. Do not know g. Other religion, please specify:
18. Charge paid by participants	a. Free b. Token charge to participants	c. Full charge d. Other, please specify:
19. Acknowledgement of participation	a. No b. Yes, certificate c. Yes, qualification	
20. End product	a. No b. Yes, a performance c. Yes, an exhibition of art work or craft work d. Yes, a film or video e. Yes, participants attended a show	
20a. If there was a performance or exhibition, please estimate the audience numbers		
21. Total cost of project		
22. Estimate of ACNI core funding attributable to this project (the number of workshops or events for this project divided by your total number of workshops or events times total core funding)		
23. ACNI project funding		

ACTIVITY FORM FOR PRODUCTIONS/CONCERTS

1. Name of organisation	
2. Name of production/concert	
3. Were the performers paid?	a. All b. Most c. Some d. None
4. Number of professional artists employed	
5. Origin of production	a. Own production b. Co-production c. Tour from NI company d. Tour from company based outside NI
6. Where else touring	a. Within NI b. Rest of the UK c. Republic of Ireland d. Outside the UK
7. Was the production/script a new work?	a. Yes b. No

ACTIVITY FORM FOR PERFORMANCES/CONCERTS (ONE FORM PER VENUE)

1. Name of organisation	
2. Name of production	
3. Was the venue at your home base?	
3a. If not, what was the post code of the venue?	
4. Type of venue	<ul style="list-style-type: none"> a. Theatre b. Concert hall c. Gallery d. Other arts venue e. School f. College of further or higher education g. Youth club h. Other community org. i. Library j. Museum k. Other venue, please specify:
5. Targeting	<ul style="list-style-type: none"> a. Children/young people b. Socially/economically deprived groups c. Rural groups d. Ethnic minorities e. Offenders f. People with disabilities g. Victims h. The general population i. None j. Other, please specify:
6. Any methods to support access	<ul style="list-style-type: none"> a. Outreach b. Group targeting c. Pricing d. Help with transportation e. Publicity available in different languages f. Publicity available in different formats g. Accessible venue h. Use of sign language i. Support worker costs j. Sensory interaction k. Audio described l. None m. Other, please specify:
7. Date of first performance	
8. Date of last performance	
9. Total number of performances at this venue	

10. Seating capacity	
11. Percentage of available tickets sold	
12. Total number of tickets sold	
13. Number of full price tickets sold	
14. Number of discounted or free tickets distributed	
15. Number of concessionary tickets sold	
16. Minimum ticket price	
17. Maximum ticket price	
18. Total audience numbers	

ACTIVITY FORM FOR EXHIBITIONS

1. Name of exhibition	
2. Post code of venue	
3. Date started	
4. Date ended	
5. Exhibitions days	
6. Type of venue	<ul style="list-style-type: none"> c. Gallery a. Theatre b. Concert hall d. Other arts venue e. School f. College of further or higher education g. Youth club h. Other community org. i. Library j. Museum k. Other venue, please specify:
7. Targeting	<ul style="list-style-type: none"> a. Children/young people b. Socially/economically deprived groups c. Rural groups d. Ethnic minorities e. Offenders f. People with disabilities g. Victims h. The general population i. None j. Other, please specify:
8. Any methods to support access	<ul style="list-style-type: none"> a. Outreach b. Group targeting c. Childcare d. Affordability e. Help with transportation f. Publicity available in different languages g. Publicity available in different formats h. Accessible venue i. Use of sign language j. Support worker costs k. Sensory interaction l. Audio described m. None n. Other, please specify:
9. Charging paid by visitors	<ul style="list-style-type: none"> a. Free b. Token charge to visitors c. Full charge d. Other, please specify:

10. Origin of performance	a. Own production b. Co-production c. Tour from NI company d. Tour from company based outside NI
11. Where else touring	a. Within NI b. Rest of the UK c. Republic of Ireland d. Outside the UK
12. Number of artists exhibited	
13. Total number of visitors	
14. How visitor numbers are produced	a. Counter b. Estimate c. Sample count

ACTIVITY FORM FOR PUBLICATIONS

1. Name of organisation	
2. Name of publication	
3. Type of publication	a. Book b. Periodical c. Exhibition catalogues d. CD Rom e. Newsletter f. Other, please specify:
4. Age of publication	a. New title b. Backlist
5. Language	a. English b. Irish c. Ulster Scots d. Other, please specify:
6. Any methods to increase access	o. Large print p. Talking books m. None n. Other, please specify:
7. Number of copies of the publication produced	
8. Number of copies of the publication sold	
9. Numbers of copies of the publication distributed free	

APPENDIX THREE: OPTIONAL QUESTIONNAIRES

Optional questionnaires are provided:

- To help you collect information for the obligatory questionnaires.
- To save you time in writing questionnaires for other areas of interest to your organisation.
- To encourage you to think about the way that evaluation can help your organisation to learn from experience.

Recording activity

NOTES FOR THE ENROLMENT FORM

Keep track of activity as you go along. It is much more difficult and time-consuming to try and reconstruct a description of your work after the event. Record what happened, **not** what could have happened, might have happened, should have happened or will happen.

This information is simple but very useful. It is surprisingly common for arts organisations not to know how many participants they have or had. This puts them at a great disadvantage in raising funds: if you have done the work, you should take the credit for it.

The main point in measuring the outputs of voluntary and community sector arts organisations is to demonstrate the depth rather than the breadth of participation. You are unlikely to have large numbers of participants, but you could have intensive, detailed participation which you will want to communicate in your evaluation. This is not difficult to do.

You should collect basic information on **all** project participants. The only exception would be for drop-in projects where participation in the project is relatively brief and inconsistent. However, wherever you can, please collect this information as it will help you to understand and explain your work.

You might already have enrolment forms, in which case you might like to amend your existing forms to include any information on the toolkit's form that you do not currently have.

Enrolment Forms do not have to be completed at the first session of a workshop. Some arts organisations will prefer to collect some of this information at the second contact when some level of trust has been established and membership is more stable.

This form is needed to provide the contact information for the follow up telephone survey.

The first part of the form can be filled in by the participant. The second part of the form can be filled in by the project facilitator or leader or by another individual involved in the project such as a teacher.

SAMPLE ENROLMENT FORM

1. Your name		
2. Address		
3. Post code		
4. Telephone number: home		
5. Telephone number: mobile		
6. Your age	a. 17-24 b. 25-39 c. 40-59	d. 60-79 e. 80+
7. Gender	a. Male	b. Female
8. What are your employment circumstances? (<i>Please tick the main one that applies</i>)	a. Employed full time b. Employed part time c. Self employed d. Volunteer/unpaid worker e. At home	f. Unemployed g. Student h. Retired i. Other, please specify:
9. Are you a disabled person?	Yes	No
10. Do you use:	a. Visual aids or alternative formats to print i.e. Braille, large print or audio tape b. Communication support or equipment i.e. sign language interpreter, speech-to-text, loop etc. c. Equipment to aid mobility i.e. wheel chair, walking frame etc. d. A support worker or personal assistance e. Other support, please specify:	
11. Have you been involved in one of this organisation's arts projects before?	Yes	No

For later recording: sessions attended (please tick)

1	2	3	4	5	6	7	8	9	10

NOTES ON THE ATTENDANCE SHEET

There are two forms of the attendance sheet: for individuals or groups. The individual form is necessary for all projects where 90% of the participants are over 17. A random sample of these individuals will be included in the Arts Council's Follow up Survey.

Collecting information at the individual level is more accurate and easy to keep track of. However, your participants might come to you through a group (e.g. school or youth club), in which case you might not know individual details. In this case, you might prefer to keep records for the Obligatory Activity Form for Participation through a group attendance sheet. This can be completed by your artists or facilitators or by the teachers or workers from your partner agency.

GROUP ATTENDANCE SHEET

Name of school/group	Telephone	Full post code of school	Age range	Gender	Number of participants with a disability	Total number of participants	Total number of sessions
1.							
2.							
3.							
4.							
5.							
6.							
7.							
8.							
9.							
10.							

* Put ROI for Republic.

Recording quality

NOTES FOR THE QUALITY FORM

Quality forms are internal forms to help structure your own reflection and learning. Select a sample of your sessions for observation, for example, 5-10% of sessions. If you are using observation for evaluation purposes then the sessions should be selected randomly (for example, every tenth session that you run).

The same person could complete the Quality Form and the Activity Evaluation Form. Be sure to record especially positive or vivid comments verbatim so that they can be used (anonymously) in evaluation reports or annual reports.

EXAMPLE OF ISSUES THAT COULD BE INCLUDED IN A QUALITY FORM

1. Name of project	
2. Name of interviewer	
3. Planning	Is the session well planned?
4. Resourcing	Is the funding adequate to the task?
5. Partnerships	Are partner agencies present? Do they appear to understand and support the project? Have they carried out any preparation that was expected?
6. Venue	Is the venue easy to find, accessible, the right size and shape (if relevant), secure and fit for purpose? Does the project have a clear allocation of space - not shared or double booked?
7. Delivery	Is the session at a sensible time and of a sensible length?
8. The participants	Are there enough/too many participants? Do participants form a coherent group?
9. Engagement of participants	Do participants turn up on time and stay for the duration of the session? Do they seem interested and actively involved?
10. Facilitator	Does the facilitator appear to have the right technical skills? Do they have an empathy with the participants?
11. Technology	Are there any technical strengths or weaknesses: presence or absence of a particular piece of equipment whether for sound, lighting, IT or other?
12. Originality	Is the work new? This is one of the facets of artistic quality.
13. Ambition	Is the work too ambitious or not ambitious enough?
14. Magic	Are there examples of individual inspiration? Magic is another facet of artistic quality.
15. Relevance to the audience/participants	Is the work right for the ability of the participants? Does the facilitator adapt the session to the interests or concerns of participants?
16. Other, please specify:	
17. What are the main improvements that you think we should make to this project?	

SAMPLE QUALITY FORM

1. Name of project		
2. Name of interviewer		
	Strengths	Weaknesses
3. Planning		
4. Resourcing		
5. Partnerships		
6. Venue		
7. Delivery		
8. The participants		
9. Engagement of participants		
10. Facilitator		
11. Technology		
12. Originality		
13. Ambition		
14. Magic		
15. Relevance to the audience/participants		
16. Other, please specify:		
17. What are the main improvements that you think we should make to this project?		

Example from Creative Youth Partnerships, could be used for youth arts projects

NOTES FOR THE OBSERVATION QUESTIONNAIRE

You could consider obtaining feedback from your staff and partners involved in the project.

Questions should be as precise as possible rather than just asking for strengths and weaknesses of the project. If you are precise this will save your interviewees time in replying and produce better quality data.

OBSERVATION QUESTIONNAIRE FOR YOUTH ARTS

1. Name of observer	
2. Receiving organisation	
3. Name of project	
4. Name of artist(s)	
5. Date of observation	
6. Number of children/young people present	
7. Was the teacher/youth leader present?	a. All the time b. Most of the time c. A small amount of time d. Not at all
8. Did the teacher/youth leader take part?	a. All the time b. Most of the time c. A small amount of time d. Not at all
9. Did the artist(s) and the teacher/youth leader work well together?	a. All the time b. Most of the time c. A small amount of time d. Not at all
10. Was the artist well prepared for the session?	a. All the time b. Most of the time c. A small amount of time d. Not at all
11. Was the activity appropriate for the age group present?	a. All the time b. Most of the time c. A small amount of time d. Not at all
12. Did the artist set appropriate standards for the age group present?	a. Too high b. High but realistic c. Average d. Not stretching
13. Were the children/young people enthused by the session?	a. All the time b. Most of the time c. A small amount of time d. Not at all
14. Did all members of the group participate?	a. All the time b. Most of the time c. A small amount of time d. Not at all
15. Were the children/young people on task during the session?	a. All the time b. Most of the time c. A small amount of time d. Not at all
16. Did the session encourage the children/young people to think creatively?	a. All the time b. Most of the time c. A small amount of time d. Not at all
17. Did the artist(s) use the time allocated well?	a. All the time b. Most of the time c. A small amount of time d. Not at all

<p>18. Were the appropriate health and safety regulations followed?</p>	<p>a. Evidence of thought b. Not evidence of thought, but no problems c. Potential health and safety problem d. Health and safety problem</p>
<p>19. Is there anything you would like to see improved?</p>	
<p>20. Are there any lessons for the project?</p>	

Recording outcomes

NOTES FOR OUTCOMES QUESTIONNAIRE

Outcome measurement sounds intangible and difficult but you don't need a high level of detail, so it is relatively straightforward. For example, it is enough to ask whether participants increased their confidence as a result of the project, not by how much their confidence increased.

The use of social outcomes is an attempt by funders to better match the objectives of arts organisations, to move away from a reliance on economic impact evaluation. It might sound mechanistic or instrumental, however, the voluntary and community arts do have strong effects on people. We hope that recording what already occurs can show the sector in a stronger light as well as opening some interesting discussions within the sector.

You might like to change the title of the questionnaire, for example to "Your Views".

Think about whether you can apply this questionnaire as it is in, or if you need to shorten it. Participants should be interviewed at the end of the project. Don't just interview successes. Include people who dropped out part of the way through the project. If you explain that this is part of your review of the project to make the it better then most participants will be willing to be interviewed.

Apply questionnaires to a random sample of participants. It is extremely important that the sample is random because otherwise the results will not be valid. In practice, it is probably easier to select, for example, every tenth project, rather than every tenth participant. However, you must select projects randomly, not just the easy or positive projects. The Outcomes Survey is not obligatory, it is partly intended to be of value to your organisation and so you need the results to be a fair reflection of the cross-section of your work. More information on sampling is given in Appendix One.

The number of outcome questionnaires you collect should be broadly in proportion to the scale of your work, subject to a minimum number of 30-47:

Number of participants across the organisation	Percentage of participants to be interviewed
Under 50	95-100%
50-99	50%
100-299	25%
300+	10%

Analyse the survey by calculating the percentage of respondents/responses for each answer.

OUTCOMES QUESTIONNAIRE

1. Name of project			
2. Name of organisation			
3. Have you ever taken part in an arts project before?	Yes	No	
4. Have you been involved in one of this organisation's arts projects before?	Yes	No	
5. Roughly how many sessions did you attend in the project/term?			
6. Did you have problems attending?	Yes, why? a. You were busy b. The times were inconvenient c. The locations were inconvenient d. You needed help with childcare e. Other, please specify:		No
7. Did you enjoy being involved in the project?	a. Yes, loved it b. Yes, liked it	c. Neutral	d. Didn't enjoy it e. Disliked it

What effect, if any, has the project had on you? Are you:						
	1	2	3	4	5	
	☺☺	☺	☹	☹☹	☹☹	
8. More confident?						Less confident?
9. More ambitious for yourself?						Less ambitious for yourself?
10. More creative?						Less creative?
11. More able to express yourself?						Less able to express yourself?
12. Healthier?						Less healthy?
13. Happier?						Less happy?
14. More optimistic that individuals can make a difference?						Less optimistic that individuals can make a difference?
15. More likely to trust people?						Less likely to trust people?
16. More part of society?						Less part of society?
17. More interested in attending arts events?						Less interested in attending arts events?
18. More interested in education or training?						Less interested in education or training?
19. More interested in attending community events?						Less interested in attending community events?

20. Has the project brought you into contact with people who have a different religion to you?	Yes	No	Unsure/not applicable
21. Has the project helped you to understand people who are different to you?	Yes	No	Unsure/not applicable
22. Have you gained skills in any of these areas as a result of the project?	a. Creative arts skills b. Technical arts skills c. Performing skills d. People skills		e. Project management f. Project administration g. Using computers h. Communication skills i. No skills gained j. Other, please specify:
22a. If yes, have any of these skills helped you:	a. In home or social life b. In school or college c. At work		
23. Did you get a qualification as a result of taking part in the project?	Yes: which?		No
24. Is there anything else that you gained from being involved in this project?	Yes: what?		No
25. What did you enjoy most about the project?			
26. What did you enjoy least about the project?			
27. Does art matter to you more after this project? If yes, why?	a. Yes: why?	b. No effect c. Art already very important	
28. Would you like to be involved in more of the organisation's arts projects?	a. Definitely yes b. Probably yes	c. Definitely no d. Probably no	
29. How can the organisation improve its arts projects?			

30. Your name		
31. The full post code of your home		
32. Your age	a. 17-24 b. 25-39 c. 40-59	d. 60-79 e. 80+
33. Gender	Male	Female
34. Are you a disabled person?	Yes	No
35. Do you use:	a. Visual aids or alternative formats to print i.e. Braille, large print or audio tape b. Communication support or equipment i.e. sign language interpreter, speech-to-text, loop etc. c. Equipment to aid mobility i.e. wheel chair, walking frame etc. d. A support worker or personal assistance e. Other support, please specify:	
36. What are your employment circumstances? (<i>Please tick the main one that applies</i>)	a. Employed full time b. Employed part time c. Self employed d. Volunteer/unpaid worker e. At home	f. Unemployed g. Student h. Retired i. Other, please specify:
37. Are you on means tested benefits?	Yes	No

THANK YOU

OUTCOMES QUESTIONNAIRE FOR YOUNG PEOPLE (11-16 YEARS)

1. Name of project			
2. Name of organisation			
3. Have you ever taken part in an arts project before?	Yes	No	
4. Have you been involved in one of this organisation's arts projects before?	Yes	No	
5. Roughly how many sessions did you attend in the project/term?			
6. Did you enjoy being involved in the project?	a. Yes, loved it b. Yes, liked it	c. Neutral	d. Didn't enjoy it e. Disliked it

What effect, if any, has the project had on you? Are you:						
	1	2	3	4	5	
	☺☺	☺	☹	☹☹	☹☹☹	
7. More confident?						Less confident?
8. More ambitious for yourself?						Less ambitious for yourself?
9. More creative?						Less creative?
10. More able to express yourself?						Less able to express yourself?
11. Happier?						Less happy?
12. More likely to trust people?						Less likely to trust people?
13. More part of society?						Less part of society?
14. More interested in attending arts events?						Less interested in attending arts events?
15. More interested in education or training?						Less interested in education or training?

16. Has the project brought you into contact with people who have a different religion to you?	Yes	No	Unsure/not applicable
17. Has the project helped you to understand people who are different to you?	Yes	No	Unsure/not applicable
18. Did you get a qualification as a result of taking part in the project?	Yes: which?		No
19. Is there anything else that you gained from being involved in this project?	Yes: what?		No

20. What did you enjoy most about the project?		
21. What did you enjoy least about the project?		
22. Does art matter to you more after this project? If yes, why?	a. Yes: why?	b. No effect c. Art already very important
23. Would you like to be involved in more of the organisation's arts projects?	a. Definitely yes b. Probably yes	c. Definitely no d. Probably no
24. How can the organisation improve its arts projects?		

25. Your name		
26. The area you live in		
27. Your age		
28. Gender	Male	Female
29. Are you a disabled person?	Yes	No
30. Do you use:	a. Visual aids or alternative formats to print i.e. Braille, large print or audio tape b. Communication support or equipment i.e. sign language interpreter, speech-to-text, loop etc. c. Equipment to aid mobility i.e. wheel chair, walking frame etc. d. A support worker or personal assistance e. Other support, please specify:	

THANK YOU

NOTES FOR ACNI FOLLOW UP QUESTIONNAIRE

Follow up interviews will be done by ACNI.

Follow up questionnaires measure the lagged effects of your project: the effects that occur sometime after the participants attended the project. They can also be used to check whether predicted or intended consequences did occur, for example, whether someone who said the project increased their interest in learning did actually attend training or education of some kind.

As with the Outcome Questionnaire you should interview a random sample of participants. This does not have to be the sample people as interviewed earlier, so long as the two groups are comparable.

Comment means example, explanation or quote.

ACNI FOLLOW UP QUESTIONNAIRE

1. Name of project			
2. Name of organisation			
3. Have you ever taken part in an arts project before?	Yes	No	
Comment:			
4. Have you been involved in one of this organisation's arts projects before?	Yes	No	
Comment:			
5. Roughly how many sessions did you attend in the project/term?			
Comment:			
6. Did you have problems attending?	Yes, why? a. You were busy b. The times were inconvenient c. The locations were inconvenient d. You needed help with childcare e. Other, please specify:	No	
Comment:			
7. Did you enjoy being involved in the project?	a. Yes, loved it b. Yes, liked it	c. Neutral	d. Didn't enjoy it e. Disliked it
Comment:			

What effect, if any, has the project had on you? Are you:						
	1	2	3	4	5	
	☺☺	☺	☹	☹☹	☹☹☹	
8. More confident?						Less confident?
Comment:						
9. More ambitious for yourself?						Less ambitious for yourself?
Comment:						

	1	2	3	4	5	
10. More creative?						Less creative?
Comment:						
11. More able to express yourself?						Less able to express yourself?
Comment:						
12. Healthier?						Less healthy?
Comment:						
13. Happier?						Less happy?
Comment:						
14. More optimistic that individuals can make a difference?						Less optimistic that individuals can make a difference?
Comment:						
15. More likely to trust people?						Less likely to trust people?
Comment:						
16. More part of society?						Less part of society?
Comment:						
17. Has the project brought you into contact with people who have a different religion to you?	Yes		No		Unsure/not applicable	
Comment:						
18. Has the project helped you to understand people who are different to you?	Yes		No		Unsure/not applicable	
Comment:						

19. Have you attended arts events since the project?			
Comment:			
20. Have you started some training or a college course as a result of taking part in the project?	Yes	No	Unsure/not applicable
Comment:			
21. Have you taken part in community events since the project?	Yes	No	Unsure/not applicable
Comment:			
22. Have you gained skills in any of these areas as a result of the project?	a. Creative arts skills b. Technical arts skills c. Performing skills d. People skills	e. Project management f. Project administration g. Using computers h. Communication skills i. No skills gained j. Other, please specify:	
22a. If yes, have any of these skills helped you:	a. In home or social life b. In school or college c. At work		
23. Did you get a qualification as a result of taking part in the project?	Yes: which?		No
24. Is there anything else that you gained from being involved in this project?	Yes: what?		No
25. What did you enjoy most about the project?			
26. What did you enjoy least about the project?			
27. Does art matter to you more after this project? If yes, why?	a. Yes: why?	b. No effect c. Art already very important	

28. Would you like to be involved in more of the organisation's arts projects?	a. Definitely yes b. Probably yes	c. Definitely no d. Probably no
29. How can the organisation improve its arts projects?		

30. Interviewee's name		
31. The full post code of your home		
32. Age	a. 11-16 b. 17-24 c. 25-39 d. 40-59	e. 60-79 f. 80+
33. Gender	Male	Female
34. Are you a disabled person?	Yes	No
35. Do you use:	a. Visual aids or alternative formats to print i.e. Braille, large print or audio tape b. Communication support or equipment i.e. sign language interpreter, speech-to-text, loop etc. c. Equipment to aid mobility i.e. wheel chair, walking frame etc. d. A support worker or personal assistance e. Other support, please specify:	
36. What are your employment circumstances? (<i>Please tick the main one that applies</i>)	a. Employed full time b. Employed part time c. Self employed d. Volunteer/unpaid worker e. At home	f. Unemployed g. Student h. Retired i. Other, please specify:
37. Are you on means tested benefits?	Yes	No

THANK YOU

NOTES ON YOUTH QUESTIONNAIRES

These questionnaires were designed for use with Creative Youth Partnerships. However, they might be useful for organisations working with young people, especially where participants are too young to complete Outcomes Forms themselves.

Generally speaking forms should be completed at the end of the project. However, if there is a lag between the workshops and a performance you might like to split the questionnaires so that the process questions are asked at the end of the workshops, and the outcome questions after the performance.

ARTIST'S EVALUATION FORM

1. Contact Information

1. Name of project
2. Date of project
3. Name of artist

2. Preparing the Project

4. Were the objectives of the project clear?	a. Yes b. No, but it was not a problem c. No, and it was a problem
5. What information did you get from the site visit/planning process?	a. The age group of children/young people b. The abilities of the children/young people c. Curriculum links d. Contact with the teacher/youth leader e. The space and facilities available f Other, please specify:
6. In retrospect, did you get all the information you needed during the site visit/planning process?	Yes No: what else did you need to know?
7. Did you feel you had a working partnership with the teacher/youth leader?	Yes How? No

3. Delivering the Project

8. Was the Creative Youth Partnerships development officer helpful?	Yes How? No No contact
9. Did you receive the support you needed from the receiving organisation?	Yes How? No
10. Did the space available suit what you wanted to do?	Yes How? No
11. Did you find the children/young people easy to engage?	Yes How? No
12. Did the children/young people contribute to the planning of the sessions?	Yes How? No
13. Did you encounter any other problems in delivering the project?	Yes What? No
14. Were they addressed?	Yes How? No

4. Your Experiences

15. Did the project contribute to your artistic development?	Yes	No
16. Did the project increase your knowledge of the education/youth service?	Yes	No
17. Did you learn about ways to link your art form to the curriculum?	Yes	No
18. Did the project highlight gaps in your skills or knowledge that Creative Youth Partnerships could help you with?	Yes: how?	No

5. Effects on the Children/Young People

19. Did the children/young people change by the end of the project?	No	Yes
a. If yes, did their confidence increase?	a. None in the group b. A few in the group c. Most in the group d. All in the group e. Difficult to tell f. Not relevant, already strong	
b. Did their ability to concentrate increase?	a. None in the group b. A few in the group c. Most in the group d. All in the group e. Difficult to tell f. Not relevant, already strong	
c. Did their behaviour in the group improve?	a. None in the group b. A few in the group c. Most in the group d. All in the group e. Difficult to tell f. Not relevant, already strong	
d. Were their attitudes to the arts more positive?	a. None in the group b. A few in the group c. Most in the group d. All in the group e. Difficult to tell f. Not relevant, already strong	
e. Were their attitudes to learning more positive?	a. None in the group b. A few in the group c. Most in the group d. All in the group e. Difficult to tell f. Not relevant, already strong	
f. Other, please specify:	a. None in the group b. A few in the group c. Most in the group d. All in the group e. Difficult to tell f. Not relevant, already strong	

6. The Achievements of the Project

20. Do you think the project was a success?	Yes Partly No	How?
21. In retrospect, is there anything you would have done differently?		
22. Is there anything about Creative Youth Partnerships that you think should be changed?	Yes No	What?

THANK YOU

TEACHER'S/YOUTH LEADER'S EVALUATION FORM*1. Contact Information*

1. Name of teacher/youth leader
2. Date of project
3. Name of artist(s)
4. Name of project

2. Before the Project

5. Were the objectives of the project clear?	a. Yes b. No, but it was not a problem c. No, and it was a problem
6. What was your reason for being involved?	a. To give the children/young people a new experience b. To develop your skills c. To work with a professional artist d. To support the curriculum e. To release time for other work duties f. Other, please specify:
7. Did the young people contribute to the objectives of the project?	Yes No

3. The Project

8. Did you attend the sessions?	Yes	No, please go to next section
9. Was the artist well prepared for the sessions?	a. All the time b. Most of the time c. A small amount of time d. Not at all	
10. Was the activity appropriate for the age group present?	a. All the time b. Most of the time c. A small amount of time d. Not at all	
11. Were the children/young people enthused by the sessions?	a. All the time b. Most of the time c. A small amount of time d. Not at all	
12. Were all members of the group engaged?	a. All the time b. Most of the time c. A small amount of time d. Not at all	
13. Were the children/young people on task during the sessions?	a. All the time b. Most of the time c. A small amount of time d. Not at all	
14. Did the sessions encourage the children/young people to think creatively?	a. All the time b. Most of the time c. A small amount of time d. Not at all	
15. Did the artist(s) use the time allocated well?	a. All the time b. Most of the time c. A small amount of time d. Not at all	

16. Did you feel that you had a working partnership with the artist(s)?	Yes No	How?
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4. Your Experiences

17. Did the project change your view about the role of the arts in youth development?	a. Yes, more positive b. Yes, more negative c. No, already very positive d. No, other	How?
18. Did the project change the status of the arts within your organisation?	a. Yes, more positive b. Yes, more negative c. No, already very positive d. No, other	How?
19. Is there anything in your own professional practice that you would do differently because of the experience of the project?	Yes No	What?
20. Do you feel more confident integrating arts activity into your ongoing work?	Yes No	How?
21. Would you use the same artist again?	Yes No	Why?
22. Would you like to take part in future arts projects?	Yes No	Why?

5. Effects on the Children/Young People

23. Did the children/young people change by the end of the project?	No	Yes
a. If yes, did their confidence increase?	a. None in the group b. A few in the group c. Most in the group d. All in the group e. Difficult to tell f. Not relevant, already strong	
b. Did their ability to concentrate increase?	a. None in the group b. A few in the group c. Most in the group d. All in the group e. Difficult to tell f. Not relevant, already strong	
c. Did their behaviour in the group improve?	a. None in the group b. A few in the group c. Most in the group d. All in the group e. Difficult to tell f. Not relevant, already strong	
d. Were their attitudes to the arts more positive?	a. None in the group b. A few in the group c. Most in the group d. All in the group e. Difficult to tell	

	f. Not relevant, already strong
e. Were their attitudes to learning more positive?	a. None in the group b. A few in the group c. Most in the group d. All in the group e. Difficult to tell f. Not relevant, already strong
f. Other, please specify:	a. None in the group b. A few in the group c. Most in the group d. All in the group e. Difficult to tell f. Not relevant, already strong

6. Your Evaluation of the Project

24. Do you think the project was a success?	Yes Partly No	How?
25. How could it have been improved?		
26. Is there anything about our overall programme of work that you think should be changed?	Yes No	What?

THANK YOU

ORGANISATIONAL HEAD'S EVALUATION FORM*1. Contact Information*

1. Name
2. Date of project
3. Name of project

2. Before the Project

4. How much money did your organisation spend on professional artists last year?	£
5. Is your use of professional artists changing?	a. Increasing b. Staying the same c. Decreasing
6. How easy is it to find out what artists' programmes are available?	a. Easy b. OK c. Difficult
	Comment:

3. Planning the Project

7. Did the project fit in with your overall organisational objectives?	a. Yes, strongly b. Yes, partly c. No
8. What were your objectives for the project?	a. To give the children/young people a new experience b. To develop teachers'/youth leaders' skills c. To work with a professional artist d. To support the curriculum e. Other, please specify:
9. How easy was it to motivate teachers/youth leaders to take part?	a. Easy b. OK c. Difficult
	Comment:
10. How easy was it to schedule the project into the curriculum?	a. Easy b. OK c. Difficult
	Comment:
11. How easy was it to find the money for the project?	a. Easy b. OK c. Difficult
	Comment:

4. Your Evaluation of the Project

12. Did you think the project had enduring effects on the teachers/youth leaders?	Yes No	If yes, did it: a. Show them new ways of teaching b. Increase their interest in the arts c. Other, please specify:
13. Did you think the project had enduring effects on the pupils?	Yes No	If yes, did it: a. Increase their confidence b. Increase their interest in learning c. Increase their interest in the arts d. Other, please specify:

14. Do you think the project was a success?	a. Yes b. Partly c. No	Please explain:
15. Was the project value for money?	a. Yes b. Partly c. No	Why?
16. How could it have been improved?		
17. Is there anything about our overall programme of work that you think should be changed?	Yes No	What?

THANK YOU

APPENDIX FOUR: DATA PROTECTION FORM