

HIDDEN  
HISTORIES

HIDDEN  
HISTORIANS

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# Welcome!

This toolkit is number 3 in a series produced by Manchester Histories as part of our Heritage Lottery funded Hidden Histories Hidden Historians project. The other toolkits are:

1. **Doing your historical research project**
2. **Doing your oral history**
3. **Doing your own archive**
4. **Creating your own archive**

You can download all the toolkits at [www.manchesterhistories.co.uk](http://www.manchesterhistories.co.uk).

These toolkits have been written by history and heritage professionals as beginners' guides, to give you the skills and confidence to carry out your historical projects from start to finish. You do not need any special knowledge or experience – just a general interest in history and the desire to research an area of history and heritage that is of interest to you.

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## What is this toolkit about?

This toolkit is a step-by-step guide to evaluating your projects. The toolkit has been written with individuals or small groups and organisations in mind, and is relevant for a range of different projects but especially those relating to history and heritage. The advice offered is best suited if your activity is relatively small in terms of the numbers of people it involves at each activity – e.g. between five and fifty people.

The toolkit describes the practical actions you should take, provides checklists, top tips from the professionals, includes case studies as well as links to other resources should you need any further information.

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## Who is the author of this toolkit?

Sally Fort helps organisations in the cultural, learning, creative industry and community sectors work better with the people they want to appeal to, attract and support, with regards to organisation development, social impact, and public engagement ([www.sallyfort.com](http://www.sallyfort.com)).



# Introduction: What is evaluation?

If you do any kind of project, it is a good idea to consider how successful it was once you have finished it. This is called evaluation, and it is therefore a process of gathering information and analysing it as objectively as possible, to understand how successful a programme or project was in achieving what it set out to, and what could be improved in future projects.

When you evaluate a project, you should ask the following questions:

- What difference did we make?
- What happened that wouldn't have happened otherwise?
- What did we learn?
- How can we prove what we learned?
- How can we use this experience to develop our work in the future?

## Why evaluate your project?

There are many reasons. If your project has received public or private funding you will often have to report back to the funders on how the project has gone. However, the best and most worthwhile evaluations are those that also help you learn and improve what you do.





## CASE STUDY

Here are some quotes from Greater Manchester organisations talking about how evaluation has helped their work:

***“The evaluation has made me think differently about our audiences and how we plan events for them.”***

(Manchester Museum of Science and Industry staff member)

***“I have a better understanding now of why it’s important to find out why our work matters to people, not just if they enjoyed themselves.”***

(Ancoats Dispensary Trust volunteer)

***“I naively thought I knew what our local communities wanted. I’ve learned so much.”***

(Manchester Metropolitan University professor)

***“Although we support groups all the time, it’s the first time we’ve actually run a project for them ourselves. It’s been really important to take the time to find out how we’re doing.”***

(Greater Manchester Centre for Voluntary Organisation staff member)

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Evaluation will help you achieve the following goals:

- To formally identify and document how your work achieved what it intended to do.
- To reflect on what you accomplished and learned.
- For job satisfaction, and to acknowledge and remind staff, volunteers or members why their commitment and involvement is important and makes a difference.
- To document the work as part of your group or organisation's long term memory.
- To help prioritise when making strategic decisions, allocating resources, applying for funding etc.
- To look at what works, what is needed to make it work, and what most successfully achieves your organisational aims.

It doesn't matter how many people attend and enjoy an event, or how many people you interview for an oral history project, or how your organisation's archive looks now, if you can't answer the question 'so what?' What have you achieved, what's the benefit, and why does it matter? Collect information about your activity, and analyse it by asking 'so what?' and 'what evidence is there of this?' This way, evaluation will become meaningful, worthwhile, productive and credible.



# Getting started: Designing your evaluation

You should think about how you will evaluate your project, and include this information in your initial project plan. Don't leave it until the end, as it will be impossible to gather what you need in the time remaining and may not tell you what you need to know.

The following steps give an overview of the process you might take at each stage of your project. They are then covered in more detail.

## Step one: Planning your evaluation

Come up with a plan of how you will evaluate your project. Think about what information you need and how you will collect it. Consider who will be taking part in your activities, and if there are any issues of consent, ethics and/or data protection that you should be aware of. If your project is very large, or has lots of different parts, come up with an action plan for the whole project.

## Step two: Collecting your information

There are many ways to collect the information you need, from simple feedback forms and focus group interviews, to more creative ideas such as mapping and hands-on activities.

## Step three: Analysing your information

There are many methods you can use to help you interpret your evaluation data. Just make sure the information you collect is stored securely.

## Step four: Sharing your findings

Present your evaluation findings in a professional report and share it with the relevant people. Finally, use what you have learned to reflect on the success of your project, and think about how you can use the experience you've gained when doing future projects.



# Step one: Planning your evaluation

Evaluation needs planning to ensure the relevant information is collected at the best time, in the most useful way. Ask yourself what, who and how.

## What to evaluate?

### What aims and objectives do I need to find out about?

In other words, what are the most important things you want your project to achieve? Do you need to prioritise which things you will evaluate? Often, projects will have too many aims or objectives to evaluate them all well. So it's better to prioritise a few really important ones and tackle them thoroughly.

### How much information do I need to collect, and when?

It's perfectly acceptable to choose what to evaluate from all the possibilities. You need to do what is within your resources and capacity from start to finish. Think about how much time you will have to gather the information and then analyse it later. Analysis can take longer than anticipated so prioritise it.

### What resources do I need and have for gathering information?

Resources include everything from people, stationery, creative materials, rooms, social media channels, expertise, partners or time. Resources don't need to be expensive. You can achieve a lot with blank postcards, a roll of wallpaper lining, sticky notes and sticky spots, or by recording on standard smartphones.

## Who will be involved?

Evaluators have a responsibility to be trustworthy in their approach. Some of this responsibility relates to the moral code or ethos of your group or organisation, and some of it links to legal requirements. Some starting key points are:

### Consent and inclusion

Taking part in evaluation should always be optional, however everyone involved in your project has the right to give their opinion. When you collect any information for evaluation, always make it clear to people what information you are collecting and the reason you are collecting it. Information you provide should be widely accessible.



## **Data protection**

If you are gathering information about people, you must be aware of your responsibilities under the 1998 Data Protection Act. In short, you must tell people how information about them will be kept, where it will be kept, and for how long it will be kept. You need to get their permission to keep this information, and give them the option to refuse to provide the information. Once you have gathered the information, you must keep it safely and securely.

## **Safeguarding**

Safeguarding means preventing harm, neglect or abuse. Safeguarding is particularly important if you are working with young people aged 18 and under, and/or vulnerable adults. You must make sure any information you collect about these groups respects and protects their personal safety, so never combine details in such a way that another person could use them to identify who they are or where to find them. Limit the breadth and depth of information you collect.

## **Proportionality**

Evaluation should be planned in such a way as to have no negative impact on the quality of experience people taking part in your project want to have. The amount of time and effort you are asking them to spend helping with your evaluation needs to be in keeping with the amount of time they are taking part in the event or project. Also, consider your own resources and what can you realistically commit to in terms of planning, producing the materials needed and analysing data collected.

## **Confidentiality and anonymity**

Only collect information you need, and be mindful that you may need to be sensitive about collecting some kinds of information. If you need to gather personal details, try to create ways you can do this privately and anonymously. If your evaluation is taking place in a group, set clear ground rules about respect, confidentiality and safeguarding disclosure before conversations begin. Ensure everyone present agrees, or collaborate to create ground rules everyone feels comfortable with. You could also arrange to gather details individually after the group discussion has finished.



## Equality, access and communication

People absorb, process and share information in different ways. Some people prefer visuals, some by listening, and some through a sense of feeling (either physically or emotionally), and so on. Likewise, some people prefer email, some phone, and some face to face communication. Also, consider people who don't share the same first language as you, or are non-verbal, or still developing language. Make sure your communication meets their needs. This will ensure the best possible quality and quantity of involvement by people in data collection, and more importantly will create an accessible and inclusive approach for people of all ages, abilities, backgrounds and levels of experience/expertise.

## How to evaluate?

Step Two gives you more detail about a range of possible evaluation techniques, and the benefits and limitations of each. Compare the different options against your needs, resources, the scale of your activity, and the needs of your participants or visitors, to make the best selection for collecting information. Some questions to think about are:

### How do you know the information you gather will be balanced and representative of all those involved?

It's easiest to collect information from people who are more sociable or forthcoming, or who come time and time again to your events, or who you feel greatest affinity with. But if you only collect information from these people, the information will be biased, no matter how diligent and well intentioned your approach. Try and capture information that includes most of your participants, visitors or audiences. Always try and include different kinds of people in your evaluation. If you're running a series of events, collect information across the different times: evening/afternoon, or weekday/weekend, or term time/school holidays and so on.



### Evaluator's top tip

- A good rule of thumb is, the smaller the group, the higher percentage you should try and get information from. For example, in a group of five people, you should have feedback from everyone. In an event with 50 people, 50 responses would be great but at least 30 would be needed to feel at all confident about the feedback being reliable.



## What tone should you use when collecting information?

People will be most likely to give you feedback if it's in keeping with the rest of the project. So, if you're hosting a formal talk or lecture, feedback forms are perfectly in keeping with this activity. However, if you're running a family fun day, you need something that fits in with the creative and informal atmosphere, such as a creative voting system themed to match the subject of your event. If it's a tea dance, you could use a table cloth to write questions on and collect answers. If your work is digital, build information gathering questions into the digital system you're using – this could be a link to a simple online survey; or a creative challenge for people to respond to. If the activity is spoken, you could collect spoken feedback. If it's more visual art, use something visual to catch the feedback. Echo the activity in your evaluation approach and people will feel naturally more inclined to contribute.

## Do you need an evaluation action plan?

An action plan isn't really necessary for a one-off event or something just repeated a small number of times. For a programme of different activities, a large project, or something working in partnership with other groups and organisations, it can be a quick and easy document and is useful for two main reasons:

- It helps to share the plan for evaluation with anyone involved, within your own group, with volunteers or anyone involved in collecting information, or with external partners or funders
- Once your activity is in full swing and times are especially busy, an action plan is a useful reminder of what needs doing, why, when, and by whom.

### Step one checklist

Before moving on to Step two, check you have done the following activities:

- Decided on the key aims and achievements of your project to evaluate.
- Decided how much information you will collect and what resources you have.
- Considered any ethical, moral, or data protection issues involved in your evaluation.
- Chosen your evaluation methods, and created or gathered the materials you will use.



## Step two: Collecting your information

There are many ways and methods of collecting information. While there's nothing wrong with a single feedback form, don't be afraid of getting creative!

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### CASE STUDY

Ancoats Dispensary Trust held a celebration event to attract local people who could contribute oral histories about their building. The event combined an exhibition, performances and creative evaluation. After listening to advice, considering the aims and tone of their event, and discussing the possibilities, they chose the following evaluation methods:

- To show where they had come from, visitors were asked to add stickers to a map of Greater Manchester.
  - People were shown old photographs to jog their memories, and were asked to write these down on brown luggage tags, along with details of what the event and exhibition meant to them, and why they had come.
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### Choose your questions

The questions you ask people must be unbiased and not make any assumptions about what feedback you are hoping for. For example, multiple choice questions must have an equal number of positive and negative options, and the wording of a question must not be based on assumptions that could lead someone to respond in a particular way.

It might be helpful to consider both quantitative and qualitative questions so you can tell your story through statistics and stories.

#### Quantitative questions

These are questions that lead to numbers and statistics. Use quantitative questions in voting, questionnaires, multiple choice, creative methods etc.



### Examples of quantitative questions:

- How many marks out of 10 would you give this exhibition for being interesting?
- In your opinion, which one of these words best describes this event: inspiring, informative, confusing, lively, sociable, bewildering, motivating, frustrating, fun, uplifting?
- This event has helped me see my community differently. Do you: Strongly agree, Agree, Unsure, Disagree, Strongly Disagree?
- Which of these will you do as a result of this event? Nothing / Do some more research / Talk to someone about it / Come back to more events here / Look for more volunteering opportunities / Use it in my work or studies etc.

### Qualitative questions

These are questions that lead to descriptions. Use qualitative questions in surveys, vox pops, interviews, creative methods etc. Examples of qualitative questions:

- Which three words would you use to describe this exhibition?
- What will you most remember from this event in six months' time?
- What would you tell your friends about this project?
- How could the workshop be improved for people who visit?
- What was it that made you interested in coming here today?

The important thing about any questions you use is they should help you try to understand how much it was your activity that made a difference. It's easy to claim your activity made a difference to someone but more difficult to prove it. As with all evaluation, nothing is fool proof, but be as accurate as possible about the changes you can claim happened because of your activity:

- One way is to use a baseline, where you measure the level someone is at before or at the start of your activity, and again at the end. For example, using scores (e.g. 1 to 10) or scales (e.g. very poor, poor, no different, good, very good). Then look at the difference from start to finish.
- Another, is to build a reference point into your question. For example, including phrases like 'before this event' or 'as a result of this exhibition' or understanding how likely they would be to be gaining the same benefits in some other way if your activity didn't exist.

More examples and templates can be found in the Further Resources section.



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## CASE STUDY

Greater Manchester Centre for Voluntary Organisation ran The Ardwick Heritage project to look at how they could best support local people in the future. The project involved a range of events and activities looking back at Ardwick's past and encouraging conversation about what makes a community. The project finished with a celebration event. The project co-ordinator used signing-in sheets to keep track of attendance numbers, and created 'tell us what you think' boards which were mounted on the walls around the space. The design of the boards asked people directly about how far the project had met its aims. People were asked to rate the extent they agreed or disagreed with a statement, by putting a pin in the relevant section of the board.

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### Choose your methods

All evaluations techniques or methods have advantages and disadvantages. There is no single 'right' way, only the way that is best for you, having taken everything into consideration. Here are some common evaluation methods, along with some of their advantages and disadvantages:

#### Feedback form

A set of questions in the form of a survey on paper. Might be used at a lecture, may be less appropriate at a neighbourhood event, for example.

#### Advantages:

- Simple to complete.
- Easy to distribute.
- Can include qualitative and quantitative questions.
- Can be used with large numbers of people.

#### Disadvantages:

- Time consuming to input and analyse the data.
- May be too formal for the activity.
- Not suitable for people who don't read/write in the form's language or are visually impaired.
- Environmental and economic cost of large amounts of paper printing.
- Limited to those who attend activity – may not be fully representative.
- Tends to lead to very brief answers.

## Comment collections

Quick and easy way to collect short comments such as on sticky notes, in a comments book or postcards. Could work well at a drop-in event or alongside other systems throughout a long project. Less useful when working on sensitive or personal themes or with vulnerable people.

### Advantages:

- Easy to use.
- No pressure to complete.
- Can be adapted to fit theme of activity.
- Can collect doodles and drawings as well as writing.
- Can collect responses to specific questions, or open to anything participants want to say.

### Disadvantages:

- Time consuming to input and analyse the data.
- Usually completed only by those who hold strong views.
- Can influence what participants say by reading the other comments.
- Can risk lack of privacy / discretion in sensitive situations.
- Specific skills needed to analyse drawings / doodles.
- Limited to those who attend activity – may not be fully representative.



## Online Survey

Free online survey tools can help collect, store and analyse information all in the one place. Google Forms and SurveyMonkey are two of the most frequently used. You can create a link to email people asking them to respond online, or you can collect surveys any other way then add the information onto the system yourself.

### Advantages:

- Can reach large numbers of people and across huge geographical areas.
- Some systems do the analysis of quantitative data for you.
- Can be more accessible for different disabilities, different languages, and completed at people's own pace and time.
- Some free online services available for this.
- Can collect responses from those who didn't participate as well as those who did.

### Disadvantages:

- Need skills and access to software to design an effective survey.
- Qualitative feedback will still need analysing (time consuming).
- No way to ask for clarification, further information or examples.
- Free online services limit how many questions can be asked / how many responses it will collect.
- Careful attention needs to be given regarding Data Protection.
- Limits responses to those who can access the online survey and respond digitally.



## Face to face survey/Interview

Asking questions in person rather than on paper can be a more sociable and accessible approach, and you have more control over how many responses you get, and from whom. You might use this technique at busy drop-in events like festivals, carnivals, family fun days or open days. It's less suitable for small deeply focussed or participatory projects or workshops.

### Advantages:

- Can gather deeply insightful information.
- Offers opportunity to ask for clarification, further information and examples.
- Can be more representative than some methods if interviewees are selected appropriately.

### Disadvantages:

- Clipboard type surveys can be off-putting to some people.
- Time consuming to collect, organise and analyse.
- The time needed to carry out can lead to low numbers of responses.
- Needs skills to listen, document, think, reflect, synthesise information and show interest simultaneously.
- Interviewer needs to have strong interpersonal skills.
- Important to find the right environment.
- Interviewees may feel the need to please the interviewer and not be fully honest.



## Focus group

A focus group can be used by someone with good facilitation skills to find out about a small number of questions from a small group of particular kinds of people. It's very useful for delving deep into what works, or doesn't, what people thought or how they benefitted, and really understanding why – what created that experience for them. It can work well as part of a menu of different techniques and as part of a large or long term project. You wouldn't want to use a focus group for a one-off event or anywhere you need to collect information from a lot of people.

### Advantages:

- Can delve into a topic more deeply.
- Possible to tailor what kinds of people give feedback.
- Can be more accessible if designed and facilitated well, by using range of communication formats.

### Disadvantages:

- Needs skills in facilitation to ensure all individuals are included.
- Is resource heavy – room, facilitator, recording materials, refreshments, recruitment.
- Not representative of all audiences / participants.
- Time consuming to design, run, document and analyse.

## Soundbites or vox pops

These are ideal for collecting feedback about one or two things from busy people, such as those on the way out of an event, in a queue, moving between one activity or room and another, or wandering around an outdoor space or event. They're less ideal when you need to ask lots of different questions, or reach large percentages of your audience..

### Advantages:

- Quick and easy way for people to respond.
- No writing required.
- Good for instant feedback.
- Can reach reasonable number of people in short time.
- Can use oral history equipment or standard smart phone.
- Good to use at fun, informal event.

### Disadvantages:

- Needs recording equipment.
- Film recording can be off-putting to people (audio recording takes the pressure off).
- Time consuming to type up and analyse.
- Number / depth of questions asked is very limited.



## Observations

Observations can be great for simple attendance numbers and quick notes about an event or activity from an organiser's perspective. You can make notes on a template that you can use for many different events and activities, so your information stays consistent. Observations can also give you insight into understanding how people behave or interact with your event, exhibition or display (though this takes more time and effort to carry out well and without being intrusive). Don't try observations without some prior research about the technique, or if you're already doing something else such as managing an event or running a workshop.

### Advantages:

- Can see responses 'in the moment'.
- Can look for patterns of behaviour.
- Useful to see natural instinctive response to activity.
- Useful for understanding human interaction.
- Helpful for identifying barriers.
- Can identify patterns of interest / behaviour / barriers in relatively short timeframes.
- Can be useful where participants can't give direct feedback.

### Disadvantages:

- Needs well designed ethical approach.
- Needs skills to create appropriate observation template / framework.
- Can be uncomfortable for observer / observed.
- High risk of subjective analysis (unless there are multiple observers who can reach agreements about their interpretation).
- Can be subject to uncontrollable factors e.g. weather, low attendance.
- Used alone, it excludes visitor / participants own voice.
- Needs other techniques alongside to understand why the things you observe are the way they are.



## Ratings

Voting, scoring or multiple choice techniques are a flexible option that can be included across all other techniques. Tread more carefully in sensitive situations where reducing things to numbers could trivialise the importance of someone's experience.

### Advantages:

- Can generate large volume of quantitative data quickly.
- Can reveal the depth of success / challenge not just the type.
- Can be adapted into creative activity easily.
- Many accessible ways to gather the information, not just reading/writing.
- Quick and relatively easy to analyse.

### Disadvantages :

- Needs skill to ensure there is no bias in how the voting / scoring is structured.
- Won't provide any depth about what the responses were based on.
- Doesn't allow for visitor / participant's own voice.
- Some people just can't put a number on an experience.

## Attendance count

You should always attempt to keep a record of attendance, whatever the occasion. Even a 'best guess' is helpful, as long as you make this clear in your reporting at the end of the evaluation..

### Advantages:

- Simple indicator of success of activity (if you have something to compare it to, so you know what a successful number is).
- Easy to collect.
- Can show useful visitor / participant patterns if collected over a longer period.
- Can show how well participants were retained (I.e. stayed with the project) over a series of sessions within a project for the same people.

### Disadvantages :

- Doesn't explain what influenced attendance numbers.
- Doesn't identify what kinds of people attended.
- Doesn't show what's changed because of attending.



## Mapping

Mapping is quite literally the process of collecting or organising information about a given theme on paper, so you can see the information visually and make connections between what you see. This is a good technique to use in focus groups, on pinboards at community events, in schools, or with a group involved in a project together. You might have seen these before, in the form of mindmaps, or on the walls in police dramas to link people, places and events together. There's no right or wrong way to map, just make sure it is visual and works for you to help make connections.

### Advantages:

- Accessible – doesn't necessarily rely on reading or writing.
- Can help report on demographic information anonymously.
- Useful for gathering information in a group situation.
- Useful way to document and organise complex information.

### Disadvantages :

- Requires a level of visual recognition that not everyone shares.
- Can be limited to what people feel comfortable to share in a group environment.
- Needs close liaison between the person gathering the information and the person analysing the information so that each understands the other's needs and can accurately translate and interpret the data.



## Making and symbols

Using hands-on activity can help people express things they don't know exactly how to put into words, or to use metaphors to express difficult or sensitive concepts. For example, this could include making models with dough or clay, designing posters or drawing pictures.

An alternative is to have a range of very different images or objects available such as postcards or small toys and ask people to select something that best sums up their experience of the activity. Depending on the circumstances this can be done in a group, or one-to-one. Hold a conversation whereby each person describes their image or object, and in what way it sums up their experience. These techniques work well as part of participatory projects and in informal situations. It's not suitable for something more formal, where time is very limited, or where you need to reach a large number of people.

### Advantages:

- Useful to remove inhibitions and express responses which are hard to put into words.
- Can be embedded harmoniously into creative project / event activity.
- Accessible to many communication and sensory preference.
- Works best when also discussed, described or annotated.
- Depersonalises the feedback by transferring it onto something else.

### Disadvantages:

- Can alienate people inhibited by requests to be creative 'on demand'.
- Analysis is open to interpretation unless checked back with participants (not always practical or appropriate).
- May need additional resources – budget, space, materials.
- Needs skilful facilitation to progress safely and sensitively.





## Evaluator's top tip

Whatever evaluation methods you choose, here are some tips to help your information collection go smoothly:

- Only include a small number of open (qualitative) questions. They require more time and effort for people to answer, and the information is harder and takes longer to analyse.
- Include a space for people to comment on anything you haven't asked, for example a question like "is there anything else about this event we should know?"
- If possible, use more than one way of gathering information so the process is accessible, and you can compare results to ensure your conclusions are accurate.
- Similarly, get information from more than one group of people: participants, visitors, volunteers, event staff, workshops co-ordinators – so you can compare the results and be objective about what happened.





## CASE STUDY

My Community UK created a project to bring together teenage women and their female elders from South Asian communities, to look at the differences in their experiences of living in their part of Manchester over the years since the elders moved into the area. They looked at old photographs, watched new and old Asian films, talked about music, and discussed values, interests and lifestyles. At the end of the project the women attended a celebratory event held at Archives+. After a joyous atmosphere with films, food and conversation, the event co-ordinator sat with the women on the bus back to their area of Manchester, and completed feedback forms in conversation with them one by one (so removing barriers around reading / writing English). Project co-ordinators held regular debriefs throughout the project, comparing observations and reflecting on the processes, challenges and successes. These were collated into blog posts, and the full set of data was analysed and presented to funders, project partners and colleagues at the end of the project.

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### Step two checklist

Before moving on to Step three, check you have done the following activities:

- Thought about the difference between quantitative and qualitative questions, and used a mixture of both in your evaluation materials.
- Investigated different methods of collecting your information.
- Chosen your methods by thinking about the resources and limitations you identified in your evaluation plan.



## Step three: Analyse your information

Once you have collected your information, it's time to organise, store and analyse it.

### Organising and storing your information

Organising and storing can be time consuming but will help you analyse your information more easily.



#### Evaluator's top tip

- Only store and use data in the way that was planned and explained in the process. Keep in mind the Data Protection Act. Do not pass the data on to anyone else, unless agreed at the time it was collected (for example, you may have sought permission to share some information with your funder or project partners).

You can enter information gathered using interviews, feedback forms, questionnaires, focus groups, and/or through voting, rating etc. into a spreadsheet. Most computers will have spreadsheet software (such as Excel) already installed on them. You can also find free spreadsheet software online, such as Google Sheets and Excel Online. You need to manually design and enter information into spreadsheets, but they can really help with the analysis of your information.

Another way is to enter the information into an online survey tool such as Google Forms or SurveyMonkey. One benefit of online survey tools is that many have analysis methods already built in that you can use. If you have information on video, images, or audio files, you can upload these into your computer for storage and analysis.

Ultimately, it is up to you how you choose to store and organise your evaluation material. Just make sure you store your information safely and securely, and organise it in a way that makes it easy to search for and analyse things later.



## Analysing your information

Try to leave the analysis until the after all the information has been collected, stored and organised. Starting the analysis earlier means that you will need to update it every time new information is added.

### Analysing information in a spreadsheet

- Enter each question, choice or statement asked into the top of a separate column. These are your column headers.
- List the answers given down the side, one answer per row.
- Go through the information you have gathered, and enter an 'X' into the box where each question and answer meet.

Here is an example of what your spreadsheet might look like:

OUTCOME	Increased knowledge	Happier	New skills	Inspired to volunteer
COMMENT				
It was nice to spend time with mum		X		
I never knew that happened here	X			
I now know how to research in archives			X	
I'll want to keep touch and see how I can help				X

From here, you can calculate totals, percentages, look for patterns, and create graphs and charts. You can show in numbers how strongly the outcomes were met – this will help you start to see what the key strengths were of your activity, and where you could improve or develop it in future.



## Analysing visual information

- You can transfer the information into a spreadsheet table, or use visual tools to represent the data. For example, if you have collected people's postcodes, you could mark these on an online interactive map (such as Google Maps).

LOCATION	Hulme	Other Manchester	Other Greater Manchester	Other NW
POSTCODE				
M21		X		
M15	X			
SK14			X	
BB11				X



Artworks and other creative 'makes' are more difficult to analyse. Find out what information the activity was designed to measure, or what people were expected to gain. This will help you focus, know what to look for, and give you something to compare the finished materials against. As this can be a highly subjective process, look for clear, recurring patterns, and/or compare your interpretation with other information such as surveys, quotes, interviews or other comments. It's also a great idea to ask people participating in the evaluation to describe their work so that you are clear on its meaning.





## Evaluator's top tip

Always check your interpretation of the information. Ask yourself the following questions:

- Can you find another explanation for your conclusions?
- Could the data be interpreted a different way?
- How much or how little data backs up your analysis?

If you have doubts, be clear in your reporting how reliable the results are. Some results can be strongly substantiated, others might be more of an indication, or just theories which need further exploration to verify. All these can be included, just set the context appropriately.

### Step three checklist

Before moving on to Step four, check you have done the following activities:

- Safely and securely stored your evaluation information.
- Organised the information in a way that makes it easy to search through.
- Entered your information into an appropriate tool to make it easy to evaluate: spreadsheet, online survey tool, document etc.
- Asked yourself questions to make sure you are analysing the data as critically and objectively as you can.



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## CASE STUDY

Manchester Pride worked with Manchester Histories and Archives+ to create an online archive of lesbian, gay, bisexual and transgender histories of Greater Manchester. Their funding application described what the project hoped to achieve, and was used to decide what most needed to be evaluated. All the staff and partners got involved in the evaluation process.

Evaluation activities included:

- Collecting mini-oral histories at festivals.
- Testing a prototype version of the online archive.
- Workshops for training volunteers in archive and research skills.
- A series of tours, talks and demonstrations.

An evaluation plan was created so everyone could clearly see the following information:

- What the evaluation intended to achieve.
- The timeframes for all parts of the process, linked to the project's calendar of activities.
- The ways information would be collected about the processes, experiences and the kinds of people who took part.

The final evaluation contained information from a collection of vox pops, surveys, event observations, phone interviews and website usage information. A largely visual report was created including statistics, stories, successes, challenges, quotes, photographs, charts and recommendations. It was circulated to the project partners for feedback, then finalised ready to help the development of other projects in the future, and report back to the funders (Heritage Lottery Fund) about the work.

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## Step four: Sharing Your findings

Once you have analysed your evaluation data, you will want to share your findings with other people. The best way to do this is by writing a final report. The format of your report will depend on who will read it. For example, if you have to give a report to satisfy a funding organisation, they may have their own requirements for your report's length and what you cover in it. Find out what is needed before you begin, keep in mind what you have the resources/ capacity to commit to, and combine these to ensure your findings can be used as effectively as possible.

### Your evaluation report

As a general guide, your report should reflect the amount of work and resources you invested in your project. So a one-off event will have a very brief report, while a year-long project will require a much longer, fuller report.

Make reports as accessible as possible by using plain English. Photographs, diagrams and quotes help to bring your report to life, but be selective about when and how you include them so they don't clutter the information. Keep things well spaced and don't be tempted to cram too much onto one page. Add a caption under or next to photographs so the reader understands exactly what it is about the image that you want to draw their attention to.

At the very start of the report add the date it was written and the name of the author(s). Also credit anyone involved in the project or the production of the report, including funders, volunteers or partners. If you use quotes, make it clear whose quote it is (if you need to protect anonymity you can just add 'participant'). If you use photos taken by someone else, add a credit for the photographer by the image.

All findings and recommendations in the reporting stage of evaluation need to be based on evidence. When important things happen, but no evidence is available, you might still want to include this information. Similarly, a report which only shares the successes, without mentioning the challenges, isn't genuine evaluation. However, you will need to think carefully and sensitively about if and how best to include such examples and challenges.

Include page numbers to make it easier for anyone reading the report.



There is no single ‘right’ way to structure your report, but you may find it helpful to use the following headings:

### **What**

Describe what your project or activity was. Keep in mind someone reading the report may have no other knowledge about your work. Don’t assume they will understand anything you don’t clearly explain. A few well selected photographs can be really useful to convey the feel of the project. The idea of this section is to try and have painted a clear picture of the project in the mind of the reader.

### **How**

This section sets out your resources and plan of activity. This could include funding contributions, partners you worked with, the number of workshops or events you held, what you did to advertise your work or recruit volunteers or participants, the number of hours or days staff or volunteers put into the project and so on.

### **Where**

This could be across a whole area like the North West, in a specific building, town, village, library or even online. You might include relevant maps, and it can be useful to explain the decisions about why that particular place was chosen. Obviously if the location is closely connected to the heritage involved, you might want to include a short amount of information setting the scene about that history, though keep it brief. The aim here is just to paint more of that picture in the reader’s mind, not educate them about all the history involved.

### **When**

This gives the reader more context. Describe the time of year, or if your work was part of a bigger programme like a Festival then include that information and the dates of the larger project as well as your own. If your activity spanned several months, it can be helpful to create a timeline showing the key events from start to finish. Don’t try and include everything, but the main stages and key milestones or public events can help readers understand how your work unfolded. If previous projects or activities led to this piece of work, it’s worth mentioning that too.

### **Who**

You will want to describe the kinds of people involved, such as a local community, a particular group or association, perhaps a key school or youth club. This is also the section to include information about the numbers and characteristics of participants, audiences or volunteers such as their age, ethnicity, gender and so on. If you collected postcodes, rather than include them all, you might drop them into something like Google maps and include a picture of the map. Or you could work out what percentage came from your borough, the wider region, or somewhere else beyond that, and just give these three percentages.



## So what

This is the most important section and shows the difference your work made. Organise this section to clearly report back on exactly what you set out to achieve. Try and give 'stories and statistics' i.e. descriptions and numbers. This is also the best place to include quotes from visitors, participants, colleagues, volunteers or partners, to bring to life the points you are making.

For example:

- If your work was to bring new audiences to a building, talk about how many of them were new, and what they thought about it.
- If your work was to collect new oral histories, discuss how well this was achieved, if any notable themes or important information emerged, how many recordings were collected and transcribed, what was especially rewarding, successful or challenging about it.
- If you planned to increase knowledge about a collection or a place, include details of how many people learned something new and what it was they learned.
- If you wanted to attract more volunteers, say if this was achieved, in what ways those volunteers benefitted from the experience, and if there are plans for them to stay involved.

If the project resulted in anything you can count, include this information. Were new artworks created? New oral histories collected? How many collection items have been documented; how many hours were spent taking care of archaeological work or cleaning and old building? How many people visited your event? Did you gain any new members because of this work?



## Why

Document the decisions and processes involved in your approach to the work. If there were challenges you experienced, or changes that took you down a different path than planned, it's important to include this so that other people can learn from your experiences. It also helps to build understanding about the kinds of things to plan for in future activities. In projects that work with partners, the why section is especially helpful, as it can describe the different perspectives partners may have had along the way and the ways in which they contributed.

Once you have written the first draft of your report, it's a good idea to have it checked for accuracy or misunderstanding. Ask some key partners to take a look and make any suggestions for editing. If there are any differences of opinion, go back to the evidence and commit to what it shows.

After a final edit, remember to send the final report to any funders and others who contributed to your work. It's also good practice to share the findings for example on your website, at local workshops, events and conferences, further afield at events for your sector or area of interest, so that others can learn from your experiences and avoid reinventing the wheel.



## Feeding into future work

Think about what you will do next as a result of what you learned from your evaluation and project. It may be you've recognised the need to do more work, to work with a specific group or type of people, that you've identified a partner you want to work with again, or that you're ready to do something similar on a larger scale. If there were things you intended to do that still need doing, you can explain what your plans are to make sure they are addressed and won't be forgotten. You may also decide you can improve the way you evaluate future activity.

Try and document these ideas somewhere. They could be included in your evaluation report, in an update for funders and project partners, in meeting minutes for your organisation, or just as a simple blog post on your website.

When you start planning new events or projects, look back over the findings and review when you come to plan a new programme to inspire ways to improve for the future.

Use the report as evidence in future funding applications. You may be able to send the complete document, or you might need to select sections.

### Step four checklist

- Plan and draft your final evaluation report. Use images, quotes, and photographs to bring your report to life.
- Use the report to cover the challenges as well as successes, and only make claims that you can back up with evidence.
- Send the first draft to key partners for checking before producing the final version.
- Send the final report to key partners, funders, and anyone interested in your project. You could also make it available on your website or social media.
- Use the experience you've gained to guide and improve your next projects



## Further resources

### General information

Manchester Histories is a charity whose main purpose is to transform people's lives from across Greater Manchester through histories and heritage. We work in partnership with a range of organisations, community and voluntary groups to encourage people to recognise, celebrate and value their own histories.

Our Hidden Histories Hidden Historians project aims to uncover histories of people, families, communities and places that are less well known and well recorded, by encouraging everyone to get involved in exploring their histories and sharing their stories about the past.

Manchester Histories has four free toolkits on other topics you can use to make the most of your project, these are:

- **Doing Your Historical Research Project**
- **Doing Your Oral History Project**
- **Evaluating Your Project**
- **Creating Your Own Archive**

You can find all our toolkits at [www.manchesterhistories.co.uk](http://www.manchesterhistories.co.uk)

### Evaluation planning

Big Lottery Fund's Your Project and Its Outcomes is an accessible guide to planning and carrying out meaningful evaluation. A useful guide for evaluation beginners and beyond. Please note this link results in a PDF document download not a webpage.

[www.biglotteryfund.org.uk/-/media/Files/Publication%20Documents/project\\_outcomes.pdf](http://www.biglotteryfund.org.uk/-/media/Files/Publication%20Documents/project_outcomes.pdf)

National Council for Voluntary Organisations (NCVO), How to Develop a Monitoring & Evaluation Framework

<https://knowhownonprofit.org/how-to/how-to-develop-a-monitoring-and-evaluation-framework>

Prove & Improve – a toolkit by New Economics Foundation to understand and improve what you do. Includes a range of planning tools and methods to use. Prove & Improve is the basis for Heritage Lottery's 2012 Evaluation Guidance.

<http://www.proveandimprove.org/>



## Heritage & culture

Heritage Lottery Fund (HLF) 2012 Evaluation Guidance

[www.hlf.org.uk/evaluation-guidance](http://www.hlf.org.uk/evaluation-guidance)

Inspiring Learning for All is a framework for cultural work, to explore learning and social outcomes, and improve future activity. It includes practical guidance, templates and help on how to analyse your data.

[www.artscouncil.org.uk/resources#section-1](http://www.artscouncil.org.uk/resources#section-1)

The Quality Metrics were developed and tested in Manchester and are now in general use by arts and heritage organisations in receipt of Arts Council funding, as well as researchers in wider sectors.

[www.artscouncil.org.uk/quality-metrics/quality-metrics](http://www.artscouncil.org.uk/quality-metrics/quality-metrics)

University College London: Museum Wellbeing Measures Toolkit is a robust, colourful and informal tried and tested evaluation tool, with different versions for different types of people. Can be used at one-off events as well as longer projects.

[www.ucl.ac.uk/museums/research/touch/museumwellbeingmeasures/wellbeing-measures](http://www.ucl.ac.uk/museums/research/touch/museumwellbeingmeasures/wellbeing-measures)

## Participatory & creative methods

Creative & Credible is a web resource to help develop the knowledge, skills and resources of the arts and health sector around evaluation, with arts-based perspectives and methods, emphasising the value of creative approaches used within a robust framework.

<http://creativeandcredible.co.uk/>

NCVO's guide to creative consultation or participatory methods.

<https://knowhownonprofit.org/organisation/impact/measuring-your-impact/participatory-methods>

Helen Hamlyn Centre for Design researches and designs projects which help improve people's lives in the fields of age and diversity, healthcare, and work. As part of the Royal College of Art they offer this range of inclusive consultation and creative information gathering options

<http://designingwithpeople.rca.ac.uk/methods>



