Evaluation Core Essentials Page

This page is a quick start to what you need to develop your project evaluation

- Quick one page introduction to Evaluation
- Joining the Dots Presentation
- Arts Theory of Change Template for your project
- The Arts Evaluation Planning Template
- Arts Impact Summary Template to report at the end of your project

The full Arts Evaluation Toolbox is made up of:-

- Introduction and why we do evaluation
- Planning your evaluation
- Results and Evidence Framework Guidance (REF Level 2 and Level 3)
- Evaluation toolkits to support looking at particular REF themes such soft power
- Communicating your evaluation findings
- ODA funded projects
- Value for Money approach
- Some points to consider when thinking about your evaluation plan
- Bank of survey questions to help measure impact and gather feedback
- Arts and Culture Evidence Research Bank
- Arts Evaluation Training Resources, Podcasts and Webinar
- Arts Evaluation Plan 2016 - 2020

Further Support

Regional Evaluation Managers http://intranet.britishcouncil.org/Site/SPI/Pages/Contact-us.aspx
Ian Thomas – Head of Evaluation, Arts, email - ian.thomas@britishcouncil.org

Introduction

“More importantly get better at evidencing how brilliant we are – showing, measuring, monitoring, evaluating and telling our story incredibly brilliantly - then everything else will look after itself, including the money.” Ciarán Devane, July 2016

Collectively, we can tell a powerful story about the valuable impact of public and private investment in the arts globally.
• Realise - The value of your project or programme;
• Compare - Connect, benchmark, and share to strengthen your project or programme;
• Communicate - Have richer conversations about your impact and value of your project or programme;
• Grow - Use actionable insights to drive your growth in your area.

Evaluation is a process that takes place before, during and after an activity. It includes looking at the quality of the content, the delivery process and the impact of the activity or programme on the audience(s) or participants.

Taking the opportunity to understand whether you achieved what you set out to, how well you did it, what impact your activity has had and to reflect critically on both the activities and processes will benefit you and your audiences. This knowledge can be used internally by your team to drive improvement and externally to demonstrate achievements.

The big question is how does the arts deliver and develop an evidence base against: security, prosperity and influence?

The British Council’s Arts Strategy sets out five pillars for our global arts programme:-

• Arts for Social Change;
• Sharing arts work with the world;
• Capacity building;
• Fostering collaboration and networks;
• Policy and research

Evaluation helps us judge and helps us show whether we’ve met our goals / outcomes against our Arts Strategy and forms part of your evaluation plan and thinking how your work relates back to the Arts Strategy and to the Corporate Plan.

• A copy of the Arts Strategy can be downloaded from here
  https://www.dropbox.com/s/cjl87t9ryh2xjhy/BC013_Arts%20Strategy.pdf?dl=0
Evaluation should help you to make sure that what you are doing is as good as possible for those taking part. Taking time to focus on what is working well, what needs changing, and what has surprised you – all adds to the learning and staff development of your team. The evidence you collect in the process will be invaluable when it comes to lobbying and campaigning for your work and programmes and sharing and learning from best practice across our teams and programmes.

- Introduction to Evaluation Webinar - getting started and theory of change

The Life Cycle of your Evaluation Plan

An evaluation should provide information that is credible and useful, enabling the incorporation of lessons learned into the decision making process.

Evaluation at its heart is a simple process. It involves:

1. Stating what you intend to achieve, what are the outcomes you want to achieve, what is your evidence of need / baseline for your project?
2. Deciding how you will show whether this has been achieved
3. Gathering the necessary evidence
4. Summarising and analysing the evidence
5. Comparing findings with what was originally outlined, deciding on the implications and providing recommendations and ideas for future work

The British Council is good at capturing outputs and reach at an activity level, through our Scorecard system. Many programmes are also collecting evidence of short-term change through end of project evaluations. We also need to capture, through the arts, the long term impacts and changes we are making through our projects.
Core Evaluation Standards

Seven essential standards that should guide the monitoring and evaluation of all projects, large or small:-

1. You have a clear idea of the changes you want to see, and how your project will achieve them such as through a Theory of Change and your evaluation plan;
2. You have a clear plan for how you will monitor activities and measure whether you are achieving change;
3. You understand the current situation well enough so that at the end of the project you can tell what has changed such as by doing a baseline and evidence of need for your project;
4. You analyse your data in a structured and transparent way;
5. When measuring change you look at an issue from different perspectives in order to improve the accuracy of your results;
6. You only collect data you intend to use and is done in an ethical way;
7. You share the findings and learning from your evaluation.

Thinking about your evaluation

There are three aims of evaluation:

- To support the development of your activity (formative evaluation).
- To ensure you manage it better next time (evaluation of your processes).
- To assess the final impact of your activity (summative evaluation).

All projects should have an evaluation plan in place from the early stages of the development of the project, be clear in what outcomes you want to achieve, and, where appropriate, a Theory of Change (such as if the project is ODA funded). The depth of the evaluation plan will depend on the scale and ambitions of the project.

- British Council webinar recording on monitoring and evaluation click on this link "Everything you ever wanted to know about monitoring and evaluation but were afraid to ask". (requires free registration login) [https://cc.callinfo.com/cc/playback/Playback.do?id=2c4lto](https://cc.callinfo.com/cc/playback/Playback.do?id=2c4lto)

- British Council’s Strategy Performance and Insight Team’s Evaluation Toolkit is on the Intranet here [http://intranet.britishcouncil.org/Site/MonitoringandEvaluating/Pages/Default.aspx](http://intranet.britishcouncil.org/Site/MonitoringandEvaluating/Pages/Default.aspx)

- Online outcomes tool The Outcomes Matrix is a tool to help organisations to plan and measure their social impact. It includes outcomes and measures for nine outcome areas and 15 beneficiary groups. [http://www.goodfinance.org.uk/impact-matrix](http://www.goodfinance.org.uk/impact-matrix)
This approach can be summed up as ‘PROPER’ evaluation:

- Planned
- Reflective
- Organisation-wide
- Pragmatic
- Enabling and energising
- Responsive/re-iterative
The Results and Evidence Framework

From April 2017 we are introducing a new Results and Evidence Framework to measure the impact of our cultural relations model taking a thematic approach. It is designed to show our overall impact as clearly as possible using the data we collect and to help teams design evidence strategies for the main outcomes we are trying to achieve.

The REF 8 Themes

<table>
<thead>
<tr>
<th>Arts</th>
<th>English</th>
<th>Higher Education and Science</th>
<th>Skills and enterprise</th>
</tr>
</thead>
<tbody>
<tr>
<td>People’s lives are enriched by arts and culture and cultural heritage is valued.</td>
<td>Good English teaching helps people to study and work and to develop careers, confidence and networks.</td>
<td>People in tertiary education and research institutes get access, partnerships, training and collaboration which contribute to more prosperous, sustainable and equitable societies.</td>
<td>People have the skills to be employable and to build inclusive and creative economies which support stable and prosperous societies.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Young people</th>
<th>Women and girls</th>
<th>Civil Society and Justice</th>
<th>Qualifications</th>
</tr>
</thead>
<tbody>
<tr>
<td>Young people (aged 4 to 30) have the skills, resilience and networks to find pathways to better lives.</td>
<td>Women and girls participate in, and benefit from, decision making and social change.</td>
<td>Citizens interact with states in ways which encourage collaboration and create societies that work better for people.</td>
<td>Students and professionals get internationally recognised UK qualifications for study, life and work.</td>
</tr>
</tbody>
</table>

Arts REF Level 2

At level 2 of the REF, in arts, we are looking to count via data entry onto SAP:-

- How many people we reach through our global arts programmes via face to face, online / digital, publications and broadcasts.
- We also are counting the number of artists and arts organisations we work with, broken down by UK based artists and arts organisations and those who are not based in the UK to help us tell our UK Value narrative.
- Digital figures such as social media and websites and be collected using the British Council’s digital monitoring tools [https://digital.britishcouncil.org/skills/web-analytics/planning/scorecard](https://digital.britishcouncil.org/skills/web-analytics/planning/scorecard) In order to have traffic to your product counted towards scorecard, it needs to be listed on the digital dashboard. If you are registering a website, it will need to be tracked using Webtrends in order to report data into the dashboard.
Every month, we report on all website traffic and basic engagement. Every quarter, we report on the quarterly performance of all social media products and websites.

- Our data is also broken down by gender to help meet our reporting requirements around ODA and Gender.

**Arts REF Level 3**

REF Level 3 takes the five pillars of our global arts strategy and through evaluation and research looks to develop an evidence base and narrative around our global arts programmes:

- The development of social outcomes of targeted individuals which contributes towards greater social inclusion and social engagement in targeted countries.
- Cultural professionals and artists develop their knowledge, artistic practice, skills and networks to contribute towards greater prosperity.
- Arts and cultural organisations in the UK and target countries raise their profile, showcase UK arts and increase the economic value of their partnerships contributing towards UK’s influence and attraction in the World.
- The arts and cultural infrastructure and creative economies of the UK, cities and target countries are strengthened through investment and collaboration.
- The UK’s international reputation is enhanced through experiences of arts and culture contributing to our cultural relations and soft power approaches.

Arts programmes may also contribute evidence of impact at level 3 towards other results areas within the framework such as Skills, Women and Girls, Young People and Society.

To support arts managers work in developing their evidence base at REF Level 3 we have commissioned an evidence strategy for the arts which looks at the various evaluation approaches, evaluation tools and questions for each of the five themes for the arts at level 3 to help arts managers choose the appropriate approach for their evaluation.

There are a variety of evaluation tools later in this toolbox which may also help with your evaluation.

**Further reading and support**

The Arts Evidence Strategy can be downloaded here:-
https://www.dropbox.com/s/1dd6sl8c5z6dbzm/171002%20British%20Council%20Evidence%20Strategy%20for%20the%20Arts%20Final%20Report.docx?dl=0

There is FAQ’s sheet on the Results and Evidence Framework online here:-
https://www.dropbox.com/s/50rse4xexhpxlv81/All%20you%20need%20to%20know%20about%20the%20Results%20and%20Evidence%20Framework.docx?dl=0

There are help videos to support your planning and entering data onto SAP for REF Level 2 here:-
http://intranet.britishcouncil.org/Site/SPI/Performance/Pages/SAPEasyStepGuidesandVideos.aspx
Some evaluation tools to support your evaluation plan

You are encouraged to adapt these tools to the specific socio-cultural context in which you are working and to be outcomes led based on evidence of need for your project.

Planning your evaluation

- **British Council Arts Evaluation Planning Template** start here your evaluation planning and thinking with this template. [https://www.dropbox.com/s/lzt7o6tqstj9vtI/Arts%20Evaluation%20Planning%20Template.docx?dl=0](https://www.dropbox.com/s/lzt7o6tqstj9vtI/Arts%20Evaluation%20Planning%20Template.docx?dl=0)

- **British Council Arts Theory of Change Template** - completing a Theory of Change Template helps you to map out the necessary steps you need to take to achieve a particular goal. It can help you to identify the potential impact and risks of your plan, and connect your work to a bigger goal and is a requirement for ALL ODA funded programmes. [https://www.dropbox.com/s/8058lndj8vyji65/Arts%20Theory%20of%20Change%20Template.docx?dl=0](https://www.dropbox.com/s/8058lndj8vyji65/Arts%20Theory%20of%20Change%20Template.docx?dl=0)

- **NESTA Theory of Change Video** [https://www.youtube.com/watch?v=6zRre_gB6A4](https://www.youtube.com/watch?v=6zRre_gB6A4)

- **Developing a Theory of Change Guide** shows a project’s path from needs to activities to outcomes to impact. It describes the change you want to make and the steps involved in making that change happen. [http://www.thinknpc.org/publications/theory-of-change/](http://www.thinknpc.org/publications/theory-of-change/)


- **NESTA DIY Toolkit** - the DIY Toolkit has been especially designed for development practitioners to invent, adopt or adapt ideas that can deliver better results. [http://diytoolkit.org/](http://diytoolkit.org/)

Evidence of Need / developing your baseline support material

You understand the current situation well enough so that at the end of the project you can tell what has changed. If you don’t know what the situation is at the beginning of your project, it will be very difficult to assess change at the end. All projects should collect baseline data near the start of a project. You can then compare this with data you collect later on, to see if your project is making a difference. Baseline data should be collected as near as possible to start of the project, but only when you have a clear idea of what change you want to see and how you intend to get there.
• **Culture Segments Reports** - Culture Segments is a universal, sector-specific segmentation system for culture and heritage organisations. The principal objective of Culture Segments is to provide the sector with a shared language for understanding the audience, with a view to targeting them more accurately, engaging them more deeply, building relationships and maximising loyalty.
  https://www.dropbox.com/sh/4estavlze0zqak1/AACv7nwUsw7CObWTA4GYkbAJa?dl=0

• **Portland Soft Power Top 30 Countries Index** [http://softpower30.portland-communications.com/ranking/](http://softpower30.portland-communications.com/ranking/) - including the culture sub index


• **Civicus Civil Society Index (2009)**


• **British Council Cultural Skills Unit** Research reports in cultural skills gaps
  [https://www.britishcouncil.org/cultural-skills-unit/research](https://www.britishcouncil.org/cultural-skills-unit/research)

• **Audience Finder** is a free national UK audience insights data and development tool, enabling cultural organisations to understand, compare and apply audience insight across England.

• **Americans and the Arts Survey**
  [https://www.dropbox.com/s/luyjfinhfxgqxy/Americans%20and%20the%20Arts.pdf?dl=0](https://www.dropbox.com/s/luyjfinhfxgqxy/Americans%20and%20the%20Arts.pdf?dl=0)

• **Visit England International Markets Segments and Country Profiles**
  [https://www.visitbritain.org/markets-segments](https://www.visitbritain.org/markets-segments)

• **Association of Independent Museums Visitor Verdict** offers real-time results on a online dashboard and provides information about who visits your museum, why they are there, what they do on their visit and what they think of their experience. The results you receive are given industry context by providing a benchmark against similar museums.
  [http://www.aim-museums.co.uk/content/aim_visitor_verdict/](http://www.aim-museums.co.uk/content/aim_visitor_verdict/)

• **Measuring your Social Media Impact and The Social Media Monitor**
  [http://intranet.britishcouncil.org/news/Pages/Your_Social_Media.aspx](http://intranet.britishcouncil.org/news/Pages/Your_Social_Media.aspx)

• **EU Cultural Import and Export Datasets** produced each year.

• **World Cities Cultural Forum Dataset (2018)** 70 global cities cultural infrastructure and consumption indicators. [http://www.worldcitiescultureforum.com/data](http://www.worldcitiescultureforum.com/data)
General evaluation tools

Developing your evaluation questions

The four principles of a good evaluation question
https://www.dropbox.com/s/1rho1ved1b7wg2r/4%20Principles%20of%20a%20good%20evaluation%20question.docx?dl=0

Developing your case studies

ISPOS presentation on case studies
http://intranet.britishcouncil.org/uk/sites/KPI/Evidence%20Strategies%20Training/Case%20studies%20-%20Kelly%20Beaver.pptx

AHRC Guidance on Case Studies http://www.ahrc.ac.uk/documents/guides/case-studies-guide/

Developing your baseline and end of programme surveys

Introduction to undertaking surveys including sampling approaches

ISPSOS presentation on surveys and focus groups

Guidance notes on undertaking surveys
https://www.dropbox.com/s/93qqf7mo52cuvpp/Developing%20Surveys.docx?dl=0


Evaluation toolkits looking at particular themes / issues

Arts and Social Change

• Arts, Health and Wellbeing Evaluation Framework developed by Public Health England

• Tools for monitoring and evaluating children’s participation

• Guide on measuring Social Return on Investment and measuring Social Value
  http://socialvalueuk.org/what-is-sroi/the-sroi-guide

• Arts Education Evaluation Webinar National Endowment for the Arts Education staff hosted a webinar providing an overview to the Boston Youth Arts Evaluation Project
• **Citizen engagement scale World Vision’s Influence and Engagement matrix** this scale could be used to measure increases in citizen levels of engagement in community decision maker processes. It is suited to community level influence and change. [https://www.dropbox.com/s/7996yfu86bxxhtpcitizen%20engagement%20scale.docx?dl=0](https://www.dropbox.com/s/7996yfu86bxxhtpcitizen%20engagement%20scale.docx?dl=0)

• **Life Effectiveness Scale** - measuring personal change at an individual level (a person's capacity to adapt, survive and thrive) [http://www.wilderdom.com/leq.html](http://www.wilderdom.com/leq.html)

• **Wellbeing Scale** - measuring individual changes in wellbeing [https://www2.warwick.ac.uk/fac/med/research/platform/wemwbs/](https://www2.warwick.ac.uk/fac/med/research/platform/wemwbs/) and also the Mappniess App to help monitor Wellbeing [http://www.psyt.co.uk/](http://www.psyt.co.uk/)

• **Child & Youth Resilience Measure** designed as a screening tool to explore the resources (individual, relational, communal and cultural) available to youth aged 12 to 23 years old, that may bolster their resilience. The measure was designed as part of the International Resilience Project (IRP) [http://cyrm.resilienceresearch.org/](http://cyrm.resilienceresearch.org/)

• **Policy Change** Measure progress in influencing a specific policy as part of a project. The VSO ‘Advocacy Success Scale’ consists of eight points and is used for monitoring policy initiatives with partners. With the VSO tool the main benefit is in the process of reviewing and challenging evidence together with volunteers and partners, and then reviewing plans for the following period. [https://www.bond.org.uk/data/files/Effectiveness_Programme/research/ScalarApproaches.pdf](https://www.bond.org.uk/data/files/Effectiveness_Programme/research/ScalarApproaches.pdf)


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### Creative Economy and Economic Impacts


• **Cultural Economic Impact Tool Calculator** - this online toolkit is designed to estimate the economic impact of cultural events and activities that take place in England, Scotland and Wales. The tool can also be used for projects based in Northern Ireland [http://www.eitoolkit.org.uk/](http://www.eitoolkit.org.uk/)

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Further reading and support:-

The full Culture and Development Evaluation Toolkit is online here:- [https://www.dropbox.com/s/jcelbyy0il5976j/Final%20M%26E%20Toolkit%20for%20C%26D%20Itad%20180714.pdf?dl=0](https://www.dropbox.com/s/jcelbyy0il5976j/Final%20M%26E%20Toolkit%20for%20C%26D%20Itad%20180714.pdf?dl=0)

The external evaluation of the Culture and Development Golden Thread Programme is online here:- [https://www.britishcouncil.org/arts/culture-development/about](https://www.britishcouncil.org/arts/culture-development/about)
• **Mapping the Creative Industries toolkit**

• **EU Cultural Import and Export Datasets** produced each year.


### Further reading and support

British Council’s Value for Money Toolkit (a requirement for all ODA funded programmes)
[http://intranet.britishcouncil.org/uk/sites/ES/ADPages/ValueForMoneyToolkit.aspx](http://intranet.britishcouncil.org/uk/sites/ES/ADPages/ValueForMoneyToolkit.aspx)

Creative Enterprise Programme Case Studies

### Capacity Building and Fostering Networks

• **Networking mapping tools** [https://kumu.io/](https://kumu.io/) free online tool which maps your networks into an online visual network map

• Graph Commons is a collaborative platform for mapping, analysing and publishing data-networks. It transforms data into interactive maps and untangle complex relations that impact them and their communities. Guidance on networking mapping
  [https://blog.graphcommons.com/mapping-networks/](https://blog.graphcommons.com/mapping-networks/)

• **Cultural Partnerships Evaluation Tool** - offers a way to report the complex, multi-layered outcomes of a partnership. It examines key areas to measure return on investment including inputs, leverage, community, cultural and business benefits.
  [http://culturehive.co.uk/resources/a-cultural-partnership-evaluation-tool](http://culturehive.co.uk/resources/a-cultural-partnership-evaluation-tool) and also [https://www.artsandbusinessni.org.uk/media/1207/2012-05-15-12-53-09-82-how-to-evaluate-partnerships-a-guide-final.pdf](https://www.artsandbusinessni.org.uk/media/1207/2012-05-15-12-53-09-82-how-to-evaluate-partnerships-a-guide-final.pdf)

• **Measuring the impact of your events** – survey questions for post event feedback

• **How to evaluate online success** - details the online analytics methodology, research and key findings of a major study into how arts and cultural organisations can evaluate online success
  [http://culturehive.co.uk/resources/lets-get-real-how-to-evaluate-online-success](http://culturehive.co.uk/resources/lets-get-real-how-to-evaluate-online-success)


• **Social Network Analysis Tools** Social network analysis is the mapping and measuring of relationships and flows between people, groups, organisations, computers or other
information/knowledge processing entities
http://www.kstoolkit.org/Social+Network+Analysis

• Measuring Social Media Impact Toolkit
https://www.dropbox.com/s/zwz6yl2823g3fry/social_media_evaluation_published_on_af_site.pdf?dl=0

Further information and support

10 Years of the Creative Entrepreneur Programme Evaluation Report
https://www.dropbox.com/s/faph92xb9q3i2h/10%20Years%20of%20the%20YCE%20Programme.pdf?dl=0

Istanbul Creative Hubs Online Mapping https://graphcommons.com/graphs/21cc69ad-86d7-489d-99ac-524a3ae15b8?auto=true

Cultural Relations and Soft Power

British Council Cultural Relations Model

Evaluation tools

• Return on Influence GREAT Campaign guidance on measuring Return on Influence
https://www.dropbox.com/s/jfu5hgpga268z9x/Return%20on%20Influence.docx?dl=0
• Contribution analysis approach sets out to verify the theory of change, but also takes into consideration other influencing factors. Causality / contribution is inferred ‘beyond reasonable doubt’ [https://www.betterevaluation.org/en/start_here/contribute](https://www.betterevaluation.org/en/start_here/contribute) and also slides 23 & 24 of this presentation

• OU Cultural Value Model The CVM is a tool for rethinking and assessing cultural value from multiple perspectives and could be used for a Season or Festival such as the Iran Season and Shakespeare Lives [http://www.open.ac.uk/researchprojects/diasporas/cvp/cultural-value-framework](http://www.open.ac.uk/researchprojects/diasporas/cvp/cultural-value-framework). Example from the Iran Season

• Digital Sentiment Analysis Monitoring of digital platforms and media to determine reach, tonality and sentiment building on the work University of Liverpool and the Open University did around Shakespeare Lives digital and media analysis and also the work of the UK Indonesia Season. Example from UK Indonesia Season:

• Perception Surveys building on the work of Shakespeare Lives, UK Korea Season and the UK UAE Season targeted perception surveys of small groups of key stakeholders and / or influencers you want to track their changes in the perception of the UK before, during and after a Season or Festival for example.
  [https://www.dropbox.com/s/n2a6xt4ewhd8kpl/ICC%282017%29SLReport-Appendices.pdf?dl=0](https://www.dropbox.com/s/n2a6xt4ewhd8kpl/ICC%282017%29SLReport-Appendices.pdf?dl=0) and [UK Korea Season Perception Survey Baseline Report 2017](https://www.dropbox.com/s/pbdl1xuc3agv22h/%5BMME%5D%20Perception%20Study%20Report%20on%20UK%20Culture%20%20Arts_20161130.pdf?dl=0)

• Survey participating arts and cultural organisations to help build the evidence for Value to the UK of your programme. Example from Shakespeare Lives:
  [https://www.surveymonkey.co.uk/r/6TNX8JG](https://www.surveymonkey.co.uk/r/6TNX8JG)

• Media Analysis – building on the work and approach of the ICC for Shakespeare Lives and Liverpool European Capital of Culture measuring media impacts
  [https://www.dropbox.com/s/jct04mbck6052dw/Media%20Toolkit%20%281%29.pdf?dl=0](https://www.dropbox.com/s/jct04mbck6052dw/Media%20Toolkit%20%281%29.pdf?dl=0) and also [https://www.dropbox.com/s/n2a6xt4ewhd8kpl/ICC%282017%29SLReport-Appendices.pdf?dl=0](https://www.dropbox.com/s/n2a6xt4ewhd8kpl/ICC%282017%29SLReport-Appendices.pdf?dl=0)

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**Further reading and support**

The University of West Scotland Report into how we might evaluate arts and soft power is online here:
[https://www.dropbox.com/s/y0xzy7xsqhzyl8/Final%20report%20for%20British%20Council%203017%20%20march%20%2017%20%2017%20%20docx?dl=0](https://www.dropbox.com/s/y0xzy7xsqhzyl8/Final%20report%20for%20British%20Council%203017%20%20march%20%2017%20%2017%20%20docx?dl=0)

A paper on our developing British Council approach to evaluating arts and soft power is online here:
[https://www.dropbox.com/s/n2a6xt4ewhd8kpl/ICC%282017%29SLReport-Appendices.pdf?dl=0](https://www.dropbox.com/s/n2a6xt4ewhd8kpl/ICC%282017%29SLReport-Appendices.pdf?dl=0)
Connecting Ground Shakespeare Lives and Perceptions of the UK in Russia, China and the Horn of Africa, University of Liverpool
https://www.dropbox.com/s/wuz1x43i4gona5z/ICC%282017%29SLReport-Final.pdf?dl=0

UK Russia Year of Culture Media Analysis Report
https://www.dropbox.com/s/m2x4fyuru7ilpne/Russia%20UK%20Yr%20of%20Lit%20%26%20Lang%20Media%20Coverage%20Analysis.pdf?dl=0

Audiences

- Researching audiences at outdoor events and festivals http://culturehive.co.uk/resources/researching-audiences-at-outdoor-events-and-festivals
- Capturing the Audience Experience - The aim of this handbook is to help theatre organisations understand how audiences experience their work. It presents a new model for describing the audience experience, along with standard survey templates and guidance on how to use them in the context of a project evaluation. https://www.itc-arts-s3.studiocoucou.com/uploads/helpsheet_attachment/file/23/Theatre_handbook.pdf
- Cultural Events Impact Evaluation Resources http://www.eventimpacts.com/
- Measuring large scale arts events audiences numbers https://www.dropbox.com/s/brrkaxtu8qf2o7o/attendancetoolkit.pdf?dl=0

Communicating your evaluation findings

- British Council Arts Impacts Template working with your Communications Lead Person , a short Power Point on using the Arts Impact Template is online here:- https://www.dropbox.com/s/0w4ao9cf4ythfvy/ArtsImpactTemplate_Presentation.pptx?dl=0
- How to communicate your results guide http://www.thinknpc.org/publications/talking-about-results/
- LexisNexis is a news-tracking service that offers one of the world’s largest searchable databases of content from national, state, and local print and broadcast media. Content analysis then has to be done on the media articles. http://www.lexisnexis.com/en-us/products/nexis.page
• **NFP Charity Parliamentary Tracker** Monitors quarterly which charities and campaigns have been noticed by MPs and how MPs rate the effectiveness of their campaigns.

[http://nfpsynergy.net/nfpsynergy-monitors/charity-parliamentary-monitor](http://nfpsynergy.net/nfpsynergy-monitors/charity-parliamentary-monitor)

**Upload your evaluation reports & Arts Impacts Templates to our British Council Arts Dropbox** [https://www.dropbox.com/request/7bhWIphzwaPWpcMYdwN9?oref=e](https://www.dropbox.com/request/7bhWIphzwaPWpcMYdwN9?oref=e)

**After Action Reviews**

The After Action Review (AAR) is a short focused meeting, for the team, conducted by the team, lasting half an hour or less. AARs allow you to capture useful operational knowledge which is of immediate short term benefit, and which can be ploughed back into the next shift, or the next day's operation. This allows you to make course corrections during activity based on what you learn, it allows you to address and optimise the way you work as a team, and it allows you to start to build your collective operational knowledge. The process consists of asking four questions:

- What was supposed to happen in the activity we are reviewing?
- What actually happened?
- What were the positive/negative things that contributed to the result?
- What have we learned from this?

Further guidance on doing an after project action review can be found online here: [https://www.dropbox.com/s/7uiqd3c8a6fqc0s/After%20Action%20Review%20for%20Projects.rtf?dl=0](https://www.dropbox.com/s/7uiqd3c8a6fqc0s/After%20Action%20Review%20for%20Projects.rtf?dl=0)

**Triangulation**

An important consideration when conducting research and evaluation is whether you can rely on your data as being a true portrayal of the views or position of your population of interest. It is important to be sure that the findings being presented have not been unintentionally skewed because of how the questions were asked, or something unique about the respondents that you may have overlooked.

Triangulation is about using a range of techniques to provide insight into a topic that is particularly useful as a way of cross-checking the research findings. It is particularly useful as there is often never one ideal way to conduct research; there are many ways to find information, and each method has its advantages and disadvantages.

Triangulation is also referred to as a mixed methods approach to research. It enables you to validate data through cross-verification from more than two evidence sources. By using triangulation you are testing the consistency of the findings and increasing your chance of controlling any threats to the validity of the results.
Judging strength of evidence and extent of contribution ‘Strength of evidence’ relates to the internal validity of the evaluation findings.

- **The extent of triangulation** across stakeholders, participants/non-participants, and/or data sources.
- **A consideration of the position, knowledge, analytical capacity, reflexivity, and potential biases of primary informants** – recognising that individuals are positioned in unique ways in relation to the programme, with different levels of knowledge and capacity / willingness to analyse and reflect, as well as different incentives that may lead to bias.
- **A consideration of the broader context** – helping to ensure that explanations of change are grounded in an understanding of the political context and are not over-reliant on the explanations of programme participants.

**Sampling**

In large scale studies there are various methods for random sampling that are best advised by experienced researchers. One technique is quota sampling, where evaluators identify specified numbers of people according to pre defined characteristics, such as age and sex, in order to make up a total sample that reflects the population. This can work well in larger projects where evaluators have a good level of knowledge about project participants.

The following checklist should help you consider they key issues when reviewing the quality of the information that you have gathered for evaluation purposes.

- Sampling and recruitment of participants: do your participants represent the variety of characteristics, roles and views present in your population?
- Response rates and missing data: have you taken appropriate action to ensure a healthy response rate and that missing data are kept to a minimum?
- Appropriate method: have you chosen a method that is appropriate to the context and participants and that is feasible for you to deliver within the project’s timeline and budget?
- Bias: have you considered where bias could be introduced and taken action to minimise this?
- Ethical considerations: have you gained the appropriate consent from your participants?

**Good practice sampling guide** [https://www.theaudienceagency.org/insight/good-practice-guide-to-sampling](https://www.theaudienceagency.org/insight/good-practice-guide-to-sampling) To calculate your sample size more accurately, there are online sample size calculators. [https://www.surveysystem.com/sscalc.htm](https://www.surveysystem.com/sscalc.htm)

**If your project is ODA funded?**

Monitoring and Evaluation around ODA funded projects will need to capture the economic and social developmental impact of our work. M&E should align, test and reflect the original business case and theory of change/logframe.

As British Council and FCO have signed up to the international aid transparency initiative, we have to publish all our ODA expenditure and achievements on the FCO/IATI website for public scrutiny every
quarter. The report lists each individual ODA project by country, a short description, expenditure profile and project achievements. It is updated every quarter. It is imperative that the information in this report is accurate and that supporting documentation is available in project teams as evidence to support any questions that arise from any public or private body. Strategy, Performance and Insight team have the report template and produce the report with the support from corporate finance.

For any activity linked to Overseas Development Assistance (ODA) spend, we have a legal requirement to comply with the UK government’s International Development (Gender Equality) Act and to demonstrate that our programmes seek to reduce gender inequalities.

The British Council’s Gender Toolkit is online here:
http://intranet.britishcouncil.org/uk/sites/ES/SO%20Programming%20Tools%20Resources/Gender%20Toolkit.docx

Value for Money Approach

The broad principles for how UK government departments should ensure value for money are set out in HM Treasury publications, particularly the Green Book and Managing Public Money. The key requirements include ensuring that:

• There is a clear economic case for each spending programme.
• Interventions are evidence-based
• Risks are managed effectively.
• There are clear lines of responsibility for managing the programme.
• Costs and results are regularly monitored.
• Results are evaluated on completion.

DFID’s Smart Guide on value for money and its 4E frameworks:

• Economy: getting inputs of the appropriate quality at the right cost
• Efficiency: turning inputs into outputs as cost-effectively as possible
• Effectiveness: the extent to which the outputs are leading to the desired outcomes
• Equity: the degree to which the results are equitably distributed.
British Council’s Value for Money toolkit:
http://intranet.britishcouncil.org/uk/sites/ES/ADPages/ValueForMoneyToolkit.aspx
Data sharing – Return on Investment

If you are measuring Return on Investment as one of your evaluation outcomes, have you made contact and have the agreement of your local Department for International Trade office for their support and sharing of data between the two organisations? Have you got in place a written partnership agreement with Department for International Trade for permissions, data sharing, with named contacts, timeframes and what data is to be shared?

• Further advice on data protection is online here [http://intranet.britishcouncil.org/Site/IGRM/DataProtection/Pages/default.aspx](http://intranet.britishcouncil.org/Site/IGRM/DataProtection/Pages/default.aspx)
• Arts Council England commissioned this guidance for the benefit of the sector, both funded and non-funded, so that organisations who either have to or want to share data can do so in compliance with regulations. [https://www.audiencedatasharing.org/](https://www.audiencedatasharing.org/)

Some points to consider when thinking about your evaluation plan

• Ensure that the evaluation is pragmatic and proportionate to your needs, generating useful evidence that you can use to inform decision making and uses the appropriate evaluation tools and methods to help find out what you want to know. What works, for whom, in what respects, to what extent, in what contexts, and how?

• It is important to understand your starting point / baseline in order to say something has changed; you need to know where things stood before your project.

• It is important to consider ethical implications of evaluation activities, including procedures to protect the wellbeing and privacy of participants. The Social and Economic Research Council sets out six research principles [http://www.esrc.ac.uk/funding/guidance-for-applicants/research-ethics/our-core-principles/](http://www.esrc.ac.uk/funding/guidance-for-applicants/research-ethics/our-core-principles/) and might be worth building into your evaluation brief.

• The views of stakeholders should inform evaluation design. Consultation with commissioners, funders, arts organisations, staff, project managers, artists, and service users will identify resources and support shared understanding and agreement about evaluation aims, priorities and methods. It can help to ensure that all stakeholders have realistic expectations of what kind of data will be needed and what the evaluation can achieve.

• Think about the long term impact / outcomes of your projects / programmes after the activity stage has finished. Explore following up with participants, stakeholders post your project to explore the longer term impact of your work and what has changed for them after taking part in your activity?
• Connect your communications plan and your evaluation plan seamlessly. Good data visualisation will bring your results alive. Distinguishing evaluation from advocacy: evaluation findings can be used to support advocacy but advocacy should not drive evaluation.

• How will you respond to your evaluation, the learning and the lessons, how will it feedback into future planning and future delivery, will you publish a written response to your evaluation?

How should case studies be used in evaluation?
There is power in a good story. You may have used case study stories for many reasons, including when advocating for a project. Personal testimonial from participants who have had a positive experience can be very persuasive. However, this is not what is meant by ‘case study’ in evaluation. For an evaluator, the quality of a case study hinges on the methods used to collect and analyse the data and the writing or presentation of the story. The evaluator will select case studies that are relevant to the outcomes or issues the evaluation seeks to explore. You can have a case study of a single individual, groups of individuals, an object, even a place or a situation. A range of different kinds of data may be pieced together in a case study to tell a story relevant to the questions that inform the evaluation.

It is important to remember that a case study story is particular to an individual case; because one participant experienced something during a project, this does not necessarily mean that all participants did, or that any future participants will. This is why it is vital to select your cases carefully, so that they can genuinely help to illuminate the particular issues you are investigating.

What about creative or arts-based approaches?
An evaluator demonstrates ‘creativity’ every time they view an evaluation problem from a fresh perspective, or devises an evaluation approach tailored to a particular context. While creativity is very definitely not just the province of artists or the arts, there is a growing interest in the use of evaluation methods that use film and visual arts, poetry and creative writing, music, drama and performing arts.

Arts-based methods can be particularly powerful in uncovering hidden perspectives and in empowering participants. They may also be less intrusive than more clinically-based evaluation tools as they can be inspired by and modelled on the intervention itself. They also involve a number of challenges. For example, the results you get from them (pictures, performances or poems for example) are by nature difficult to interpret and you may require technical skills that are not a part of standard evaluation. It is particularly important to make sure that any creative evaluation approach you use ‘fits’ the project and the people who are taking part in the evaluation. Creative and arts-based evaluation methods [link](http://creativeandcredible.co.uk/wp-content/uploads/2015/07/CreativeCredible_Creative-and-arts-based-evaluation-methods.pdf)

Is internal or external evaluation best?
External evaluation can appear more credible, avoiding issues around areas where bias may creep in.
An external evaluator provides specialist skills and knowledge and may be able to disseminate findings more widely. However, the evaluation is ‘one off’ and that learning might not be embedded within the project team. In reality, many successful projects develop by using an iterative process involving both internal and external evaluation. Hybrid methods (internal and external team members) can be employed, e.g., self-evaluation by internal staff integrated into an external evaluation; external facilitator for an internal evaluation).

**Team meetings / training evaluation resources**

- Arts Evaluation PowerPoint presentation  
  [https://www.dropbox.com/s/2tlqny1yf91wdg/evaluation%20presentation.pptx?dl=0](https://www.dropbox.com/s/2tlqny1yf91wdg/evaluation%20presentation.pptx?dl=0)
- Example Arts Evaluation Plan  
  [https://www.dropbox.com/s/6rogbfoxn4vv3h7/example%20evaluation%20plan.docx?dl=0](https://www.dropbox.com/s/6rogbfoxn4vv3h7/example%20evaluation%20plan.docx?dl=0)
- South Asia Arts Evaluation Webinar (1.5 hours) in WRF file format can be downloaded in full (14mb) here:-  
- You can download the WebEx Player for Windows for free here to play the Webinar  
  [https://welcome.webex.com/client/wbxclient/atrecply.msi](https://welcome.webex.com/client/wbxclient/atrecply.msi)
- Podcast (5 minutes) Professor Geoff Crossick is online here:-  
  [https://www.dropbox.com/s/1j2vqgxxpxgd2k/Cultural-Value-podcast.mp3?dl=0](https://www.dropbox.com/s/1j2vqgxxpxgd2k/Cultural-Value-podcast.mp3?dl=0)
- Podcast (50 minutes) Professor Geoff Crossick Understanding the Value of Arts and Culture  
- Arts Impact Template Presentation  
  [https://www.dropbox.com/s/sz93jg8txepefjr/ArtsImpactTemplate_Presentation.pptx?dl=0](https://www.dropbox.com/s/sz93jg8txepefjr/ArtsImpactTemplate_Presentation.pptx?dl=0)

**Some Evaluation Terminology**

<table>
<thead>
<tr>
<th><strong>Aims (often linked to objectives)</strong></th>
<th>Why you are doing it, what your project is for. A useful analogy is to think of your project aims as the destination of your project journey (eg. We want our building to be accessible).</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Critical success factor</strong></td>
<td>Why your project, or different parts of it, have succeeded.</td>
</tr>
</tbody>
</table>
| **Evidence**                         | Evidence simply means tangible things that you can use to prove or demonstrate that you’ve made progress. Evidence is about proving you’ve made progress, have had an impact.  
   The kinds of evidence you want to collect will depend on your aims and objectives, and also the indicators you think will best show you’ve made |

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Qualitative evidence

Qualitative evidence tends to relate to, and reflect, different people’s thoughts and feelings. For example, shifts in participants’ confidence levels, or their views on improvements you’ve made. It is often viewed as ‘anecdotal’ rather than ‘factual’ evidence, because it is based on individuals’ feelings and judgements about what has happened as a result of your project.

Quantitative evidence

Often referred to as ‘hard’ evidence, because it tends to be numbers-related (eg. number of participants, increase in income) and is viewed as being more factual. It includes numbers of people who think a certain thing (eg. 79% of participants viewed our training as excellent).

(Key Performance) Indicators (sometimes known as KPIs or measures of success)

At their simplest, indicators are things that show you’ve made progress. They are how you will know you’re making progress, making a different. For example, if your project aim is to improve access to a heritage building, your indicators might include ‘more people visiting’ or a ‘more diverse range of visitors’.

Limiting factor

A limiting factor is simply something that has limited your progress or impact. It might also be called a ‘challenge’. For example, your plans to improve access to your building might be hampered by you not really having understood the access needs of a wide enough range of visitors.

Methodology

Methodology simply means ‘how we will do it’. So, in evaluation terms, it means how you will evaluate your project: how and when you will collect the evidence and how you will do it, along with how you will then review that evidence and create and share your story about your project.

Objective

Objectives are specific things that you want to achieve through your project. For example, if your aim is to improve access to your building, your objectives might include making the building more physically accessible or adapting your website.

You might sometimes hear people refer to ‘SMART’ objectives. This is an acronym; it means objectives that are:

- Specific, Measurable, Achievable, Realistic & Timetabled

Outcome (sometimes known as an ‘indicator)

An outcome is another word for what will be different (for everyone involved, including you) if you succeed. It’s the ‘shift’ or change you will see if you have succeeded.

Unanticipated outcome

This is simply a change that has happened, that you didn’t predict or
<table>
<thead>
<tr>
<th><strong>Legacy outcome</strong></th>
<th>This is simply a change that happens further into the future, as opposed to during the lifespan of your project.</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Output</strong></td>
<td>Outputs commonly relate to numbers. An output is also a tangible thing which happened during your project. For example, if your project is about making your building more accessible, then outputs might include the physical changes you have made, and the number of training sessions you have provided for staff.</td>
</tr>
<tr>
<td><strong>Stakeholder</strong></td>
<td>Stakeholders are the people or organisations who are involved in your project, or who have a ‘stake’ in it. These might include: your team, volunteers or trustees, your visitors or users and your funders.</td>
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</table>