

Planning your evaluation

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Museums are increasingly being asked to prove our value to society in robust ways. In the University of Cambridge Museums, we believe that evaluation is strongest and at its most effective when we use the most appropriate methods for both the audience and output. Some of our evaluation and audience development work continues throughout the year, sometimes we do more intensive evaluation. We use proportionate methods, which are based on what the project is, the timescale and timeline, audiences (both existing and potential), the budget, measures of success, and the change the evaluation can bring. Through all our work, we want to make sure museums and galleries are still spaces to be enjoyed, we don't want our visitors to feel that they are being studied. We usually carry out evaluation at different times in the life of a project:

Front end: this is the evaluation that happens before a project starts, perhaps testing what an audience knows about a topic, their attitude towards something or getting baseline data. It might take place before an audience is finalised, when we are working out who the activity should be aimed at.

Formative: this is ongoing testing and evaluation that takes place before something is finished. Perhaps we have had the initial idea and we want to do some user testing before we decide on the final version, for example, testing exhibition interactives.

Summative: this evaluation takes place at the end of the work, when nothing can be changed, but when you are trying to see what the impact of the final product has been on the intended audiences, whether the work met the original aims and objectives. This is the most common method of evaluation in museums.

The tools and methods you use will change depending on the audiences you are working with and what you are evaluating. You will probably want to choose two or more methods to evaluate the activity. This is called triangulation and should improve the validity of claims that you draw from your evaluation data. At the end of this resource is additional information about different evaluation methods, looking at their advantages, disadvantages, time needed, inputs and outputs. Here are some suggestions of different ways to evaluate either staff or participants for various museum activities:

| Exhibitions | Public/Participants | Staff |
|-------------|--|---|
| Front end | Focus groups User panel | Focus groups Feedback survey |
| Formative | Focus groups Interviews User panel | Focus groups Interviews |
| Summative | Feedback survey Visitor observation Interviews | Feedback survey Interviews Reflective journalling |



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| Events | Public/Participants | Staff |
|---------------|--|---|
| Front end | Focus groups User panel | Focus groups Feedback survey |
| Formative | Focus groups Interviews User panel | Focus groups Interviews |
| Summative | Feedback survey Visitor observation Interviews | Feedback survey Interviews Reflective journalling |

| Programming | Public/Participants | Staff |
|--------------------|--|---|
| Front end | Focus groups User panel | Focus groups Feedback survey |
| Formative | Focus groups Interviews User panel | Focus groups Interviews |
| Summative | Feedback survey Visitor observation Interviews | Feedback survey Interviews Reflective journalling |

| Digital activity | Public/Participants | Staff |
|-------------------------|--|---|
| Front end | Focus groups User panel | Focus groups Feedback survey |
| Formative | Focus groups Interviews User panel | Focus groups Interviews |
| Summative | Feedback survey Visitor observation Interviews | Feedback survey Interviews Reflective journalling |

Once you have decided on the methods that you are going to use, you will need to plan out your timeline. Below is an example timeline for an exhibition where the evaluator is planning to use surveys and visitor observation with members of the public:

| Example Exhibition Evaluation Timeline | | Days |
|---|---|-------------|
| The earlier the better. | Plan evaluation, create timetable, design evaluation tools (write survey, create visitor observation sheet) | 5 |
| Exhibition opens. Data collection phase. | Surveys | 5 |
| | Visitor observation | 10 |
| After exhibition closes | Data analysis and reporting | 15 |
| Total | | 35 |

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Further reading and other resources

- Judy Diamond, *Practical Evaluation Guide: tools for museums and other informal educational settings*, AltaMira Press, 1999.

If you are looking for an easy-to-read, museum-relevant guide to evaluation, this is an excellent introduction. Judy covers planning, selecting people for the evaluation, observation, interviews, questionnaires, presenting and analysing data and writing the report. She uses museum examples throughout, mainly from science collections. There is further recommended reading section at the end. The book is showing its age a little, but it is still an excellent starting point for a simple overview.

- Barry Lord, Gail Dexter Lord, Maria Piacente *The Manual of Museum Exhibitions*, AltaMira Press, 2002.

There are a few versions of this available (cheaper copies of the earlier versions are available second hand online), but the chapter on evaluation with sections by Duncan Grewcock and Barbara Soren is well-worth a read to gain a helpful overview of exhibition evaluation.

- National Co-ordinating Centre for Public Engagement (NCCPE) website, especially the guide to 'Using a logic model to develop your strategy':
<https://www.publicengagement.ac.uk/resources/guide/using-logic-model-develop-your-strategy>

To plan your evaluation, you might decide to use a logic model. Some funders are now asking for these as part of your application. If you are new to planning with logic models, this guide by Mary-Clare Hallsworth will walk you through the process step-by step. There is a worked example, which although not museum-relevant is broad enough to still be useful.

- Case studies on the websites of The British Museum, The Natural History Museum, and University of Cambridge Museums.

One of the most useful ways to learn about evaluation is to examine case studies from other museums to see what works, what you like and what you think it not so useful. The British Museum has a 'visitor research and evaluation' section on their website, with mostly summative exhibition evaluation reports, usually written by consultants. The Natural History Museum's website has an 'audience research and insight' page, with downloadable pdfs of literature reviews and some more specific reports on activities and events. Some of these are over ten years old, and at the moment the page doesn't appear to be updated regularly. The UCM Collections in Action website includes a section on resources, where evaluation support can be found. The blog also is regularly updated with evaluation reports.

- Ben Gammon and Jo Graham, 'Putting value back into evaluation', *Visitor Studies Today!* Volume 1, 1998, pp 6-8.

This short article looks the barriers that organisations (in this case, The Science Museum) face around embedding evaluation into what they do. The authors provide some practical ideas of things that audience advocates can do to bring all museum staff on the evaluation journey. A thought-provoking read.

Suggested Evaluation Methods

| Activity | Inputs | Process | Outputs (Action/item to achieve outcome) | Outcomes (What will it achieve; the difference that is made) | Advantages | Disadvantages | Time requirements (high/med/low) | Recommended applications |
|---|--|---|--|--|---|--|--|---|
| Feedback Survey UCM Evaluation Resource available | <ul style="list-style-type: none"> Paper survey questionnaires designed to collect demographic data and responses specific to the exhibition, event, or programme | <ul style="list-style-type: none"> Paper surveys positioned for maximum audience impact/attention or handed directly to participants Survey data entered by staff/volunteers if paper-based | <ul style="list-style-type: none"> Qualitative and quantitative evidence relevant to the evaluation aims Demographic audience data | <ul style="list-style-type: none"> Improved understanding of impact | <ul style="list-style-type: none"> If handed out, can use a sampling strategy Can collect both qualitative and quantitative data User Familiarity Large scale data collection is possible | <ul style="list-style-type: none"> Transcribing data is time consuming Cannot check meaning of responses User over-familiarity might lead to low response rate Requires literacy skills Environmental implications with paper-based methods | Staff/volunteer training: Low Data collection: Medium Analysis: Medium | <ul style="list-style-type: none"> Exhibitions Events with defined audience Front end, formative and summative Formal and informal learning |
| | <ul style="list-style-type: none"> Digital survey questionnaires designed to collect demographic data and responses specific to the exhibition, event, or programme | <ul style="list-style-type: none"> Audience/ participants given link to digital survey or use a tablet loaded with the survey Responses entered as part of the questionnaire process: no additional input | | | <ul style="list-style-type: none"> Can collect both qualitative and quantitative data User Familiarity | <ul style="list-style-type: none"> Harder to impose a sampling strategy Lower response rates Cannot check meaning of responses User Familiarity | Staff/volunteer training: Low Data collection: Medium Analysis: Medium | |

| Activity | Inputs | Process | Outputs | Outcomes | Advantages | Disadvantages | Time requirements | Recommended applications |
|--|--|--|--|---|--|--|---|--|
| Visitor Tracking and Observation UCM Evaluation Resource available | <ul style="list-style-type: none"> Information about audience behaviour in the exhibition, how long they spend looking at the exhibits, displays interpretation and interactives. | <ul style="list-style-type: none"> Trained evaluators (staff or volunteers) recruited to carry out visitor tracking surveys Managed by a staff member Volunteers will complete visitor tracking surveys Data uploaded and interpreted | <ul style="list-style-type: none"> Qualitative and quantitative evidence relevant to the evaluation aims | <ul style="list-style-type: none"> Improved understanding of how visitors engage with exhibition content Improved understanding of how to make exhibitions more impactful | <ul style="list-style-type: none"> Can get an idea of how a display space is being used practically Can impose sampling strategy Can observe the behaviour of different audiences No literacy or language skills required | <ul style="list-style-type: none"> Don't know why people are stopping/engaging Need clear ethical statement Environmental implications with paper-based methods | Staff/volunteer training: Medium Data collection: High Analysis: High | <ul style="list-style-type: none"> Permanent displays Temporary exhibitions Static events Formative or summative |
| Accompanied Visits UCM Evaluation Resource available | <ul style="list-style-type: none"> Questions and talking points designed to prompt conversations | <ul style="list-style-type: none"> Liaison with participants to arrange a suitable time and date Evaluator accompanies the participants and will note and record their responses to the different exhibits as they walk around, providing a detail account of individual experiences and noting any changes in thinking or attitude. | <ul style="list-style-type: none"> Qualitative evidence relevant to the evaluation aims Transcriptions and records of conversations and interactions | <ul style="list-style-type: none"> An understanding of how participants engage with exhibition content Feedback and observations from individuals or small groups | <ul style="list-style-type: none"> Opportunity to see a natural visit Immediate feedback Can use a sampling strategy Can get in depth feedback Can use with specific audiences Can look at specific aspects of exhibitions/event | <ul style="list-style-type: none"> Small sample size Could be biased if a member of staff or volunteer accompanies the group | Staff/volunteer training: Med Data collection: High Analysis: High | <ul style="list-style-type: none"> Permanent displays Temporary exhibitions Events Programmes aimed at specific audiences Formative and summative |

| | | <ul style="list-style-type: none"> The evaluator will try not to influence the visit, allowing the visitors to have as natural an experience as possible | | | | | | |
|--|---|---|--|---|---|---|---|--|
| Activity | Inputs | Process | Outputs | Outcomes | Advantages | Disadvantages | Time requirements | Recommended applications |
| Ticketing numbers | <ul style="list-style-type: none"> Numbers of people attending | <ul style="list-style-type: none"> Actual number of attendees to an event, exhibition or programme is recorded | <ul style="list-style-type: none"> Quantitative data on attendees | <ul style="list-style-type: none"> Improved understanding of periods visitors are most likely to visit | <ul style="list-style-type: none"> Simple Quick Cheap No literacy or language skills required | <ul style="list-style-type: none"> Very limited information | <p>Staff/volunteer training: Low</p> <p>Data collection: Low</p> <p>Analysis: Low</p> | <p>Almost everything with an audience</p> <ul style="list-style-type: none"> Exhibitions Events Activities with specified audience Activities for an undefined audience Summative Formal and informal learning |
| Activity | Inputs | Process | Outputs | Outcomes | Advantages | Disadvantages | Time requirements | Recommended applications |
| Reflective journaling UCM Evaluation Resource available | <ul style="list-style-type: none"> Information held in reflective journals, either physical or digital | <ul style="list-style-type: none"> Participants record their thoughts, sometimes responding to prompts, over the life of a project | <ul style="list-style-type: none"> Qualitative evidence relevant to evaluation aims Long form, reflective text | <ul style="list-style-type: none"> Retrospective identification of issues and successes in projects Deeper understanding of | <ul style="list-style-type: none"> Longitudinal data over the course of a project, from instigation to completion and beyond | <ul style="list-style-type: none"> Relies heavily on participant remembering to complete No standard questions might mean important | <p>Staff/volunteer training: Low</p> <p>Data collection: Medium</p> <p>Analysis:</p> | <ul style="list-style-type: none"> Long-term projects Adults Participatory programmes Community engagement |

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| | | | | process and change | <ul style="list-style-type: none"> Rich data which can respond to project alterations Good at capturing processes as well as outcomes Can be used by both project organisers and audience | <p>information is lost</p> <ul style="list-style-type: none"> Requires literacy skills | High | <ul style="list-style-type: none"> Activities with specified audiences Evolving projects Formative and summative |
| <p>Interviews</p> <p>UCM Evaluation Resource available</p> | <ul style="list-style-type: none"> Questions designed to collect responses specific to the exhibition, event, or programme being evaluated | <ul style="list-style-type: none"> Interviewees are approached for convenient time slots Interview takes place, responses recorded | <ul style="list-style-type: none"> Qualitative data relevant to evaluation and project aims | <ul style="list-style-type: none"> Improved understanding of project In depth understanding | <ul style="list-style-type: none"> Can get in depth feedback Possible to repeat interview process for longitudinal studies With suitable permissions, can use method with children Does not require literacy skills Can use a sampling strategy | <ul style="list-style-type: none"> Requires language skills from both interviewer and interviewee Need skilled interviewer to reduce bias and elicit responses Transcription is time consuming Can provide a large body of evidence, which can be time-consuming to analyse | <p>Staff/volunteer training: Med</p> <p>Data collection: High</p> <p>Analysis: High</p> | <ul style="list-style-type: none"> Long-term projects Short-term projects Evolving projects Exhibition process Front end, formative and summative Exhibition (summative) Formal and informal learning |
| Activity | Inputs | Process | Outputs | Outcomes | Advantages | Disadvantages | Time requirements | Recommended applications |
| Creative outputs | <ul style="list-style-type: none"> Drawings or other creative content (collage, | <ul style="list-style-type: none"> Participants asked to produce their own creative response to a provocation. | <ul style="list-style-type: none"> Analysis of the creative content; qualitative data | <ul style="list-style-type: none"> Impact of an engagement, especially from groups that may | <ul style="list-style-type: none"> Does not always need literacy skills | <ul style="list-style-type: none"> Can be difficult to interpret Environmental implications | <p>Staff/volunteer training: Medium</p> | <ul style="list-style-type: none"> Formative and summative Participatory programmes |

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| <p>UCM Evaluation Resource available</p> | <p>photographs, artworks, etc)</p> | <ul style="list-style-type: none"> • They may be asked supporting questions or to provide a commentary | | <p>struggle with other evaluation methods</p> | <ul style="list-style-type: none"> • Can engage a wide range of audiences • Can be used for long-term projects | <p>with paper-based methods</p> | <p>Data collection: Medium</p> <p>Analysis: High</p> | <ul style="list-style-type: none"> • Community engagement • Activities with specified audience • Work with children and young people • Permanent and temporary exhibitions • Events • Formal and informal learning |
| <p>Meaning maps</p> <p>UCM Evaluation Resource available</p> | <ul style="list-style-type: none"> • Words, drawings, or other creative content in response to a theme word, phrase, or image | <ul style="list-style-type: none"> • Participants given paper with central theme and asked to write or draw their responses • They may be asked to talk about or elaborate upon their responses • The same meaning map can be used before and after an intervention, using different coloured pens | <ul style="list-style-type: none"> • Analysis of the creative content; qualitative data • Comparison of responses before and after an intervention | <ul style="list-style-type: none"> • Impact of a specific engagement on a particular theme | <ul style="list-style-type: none"> • When used before and after an experience can be used to measure changes • Younger audiences have some familiarity with technique • Responses can be written or drawn | <ul style="list-style-type: none"> • Can be difficult to interpret • Environmental implications with paper-based methods | <p>Staff/volunteer training: Medium</p> <p>Data collection: Medium</p> <p>Analysis: High</p> | <ul style="list-style-type: none"> • Summative • Permanent and temporary exhibitions • Work with children and young people • Formal and informal learning |
| <p>Activity</p> | <p>Inputs</p> | <p>Process</p> | <p>Outputs</p> | <p>Outcomes</p> | <p>Advantages</p> | <p>Disadvantages</p> | <p>Time requirements</p> | <p>Recommended applications</p> |
| <p>Focus groups</p> <p>UCM Evaluation Resource available</p> | <ul style="list-style-type: none"> • The experiences of a group of people brought together to discuss a specific aspect of museum practice. | <ul style="list-style-type: none"> • Group of people brought together to discuss a topic. • Participants identified and recruited, ideally | <ul style="list-style-type: none"> • Qualitative data • Responses of a group of small people | <ul style="list-style-type: none"> • In depth data about a specific topic • Improved understanding of project | <ul style="list-style-type: none"> • Good to find out opinions of specific audiences | <ul style="list-style-type: none"> • Requires skilled facilitators • Some voices may still dominate | <p>Staff/volunteer training: High</p> <p>Data collection: Med</p> | <ul style="list-style-type: none"> • Long-term projects • Evolving projects • Exhibition process |

| | | <p>with some common ground between them. They may be users or non-users.</p> <ul style="list-style-type: none"> Facilitated conversation session, usually using prompts on the subject in question | | <ul style="list-style-type: none"> Contributions from more than one person | <ul style="list-style-type: none"> Can clarify points with the group Depth of information Can be planned to not require literacy skills | <ul style="list-style-type: none"> Transcription is time consuming Requires good language skills from participants Can provide a large body of evidence, which can be time-consuming to analyse Care is needed when recruiting and during the focus group to ensure the process is equitable Recruitment can be difficult and time-consuming | <p>Analysis: High</p> | <ul style="list-style-type: none"> Best for front end and formative Community groups Children and young people Families |
|--|--|---|---|--|--|---|--|--|
| Activity | Inputs | Process | Outputs | Outcomes | Advantages | Disadvantages | Time requirements | Recommended applications |
| <p>User panel UCM Evaluation Resource available</p> | <ul style="list-style-type: none"> The experiences of a group of people brought together over a period of time to discuss a specific aspect of museum practise. | <ul style="list-style-type: none"> Group of people from current audiences brought together to discuss issues Group will be called upon frequently and regularly | <ul style="list-style-type: none"> Qualitative data Responses of a group of small people over longer period of time | <ul style="list-style-type: none"> Improved understanding of participant views and feelings | <ul style="list-style-type: none"> Can get in-depth feedback over longer period of time Opportunity to create good relationships with panel and the communities they represent | <ul style="list-style-type: none"> Might become stale, an audience echo chamber Can provide a large body of evidence, which can be time-consuming to analyse Requires skilled facilitators | <p>Staff/volunteer training: High</p> <p>Data collection: High</p> <p>Analysis: High</p> | <ul style="list-style-type: none"> Long-term projects Evolving projects Exhibition process Front end, formative and summative Community groups Family groups Young people |

| | | | | | <ul style="list-style-type: none"> • Can clarify points • Good way to test out specific outputs (marketing materials, text, etc) | <ul style="list-style-type: none"> • Requires good language skills from participants • Care is needed when recruiting and during the focus group to ensure the process is equitable • Recruitment can be difficult and time-consuming – even more so than with focus groups | | |
|----------------------------------|--|--|---|--|---|--|--|--|
| Activity | Inputs | Process | Outputs | Outcomes | Advantages | Disadvantages | Time requirements | Recommended applications |
| Comments books/ post-it notes | <ul style="list-style-type: none"> • Short (usually written) responses from members of the public | <ul style="list-style-type: none"> • Printed comments cards or notebooks and writing implements available (or can be digital) • Prompt questions can be used | <ul style="list-style-type: none"> • Generally, provides qualitative data • Possible to get responses from all participants | <ul style="list-style-type: none"> • Feedback on a specific event, exhibition, programme, or intervention | <ul style="list-style-type: none"> • Adaptable and open method • No special equipment needed • Can ask for drawings or other feedback • Little staff time required to implement | <ul style="list-style-type: none"> • No standard questions • Environmental implications with paper-based methods • No sampling strategy • Need regular monitoring • Potential for high volume of off-topic content • Prompt question should | <p>Staff/volunteer training: Low</p> <p>Data collection: Low to Med</p> <p>Analysis: Med to High</p> | <ul style="list-style-type: none"> • Permanent displays • Temporary exhibitions • Events • Programmes aimed at specific audiences • Summative • Formal and informal learning |

| Activity | Inputs | Process | Outputs | Outcomes | Advantages | Disadvantages | Time requirements | Recommended applications |
|-------------------------------|--|--|---|--|--|--|--|---|
| Analysis and Reporting | <ul style="list-style-type: none"> • Outputs of all data collection strands • Comparison to previous reports and tracking studies • Records of data collection and exhibition information | <ul style="list-style-type: none"> • Content analysis of outputs, uncovering key themes and patterns in relation to aims • Description of the results and development of conclusions and implications • Develop clear action and learning points • Produce and circulate full report | <ul style="list-style-type: none"> • Full written report and executive summary | <ul style="list-style-type: none"> • Evaluation findings enhance understanding of impact and inform reporting and future planning | <ul style="list-style-type: none"> • Opportunity to disseminate information to stakeholders and decision makers | <p>be carefully chosen</p> <ul style="list-style-type: none"> • Requires literacy skills • Often people who feel the most strongly (positive or negative) who complete | <p>Staff/volunteer training: Low-High</p> <p>Data collection: Low-High</p> <p>Analysis: Low-High</p> | <ul style="list-style-type: none"> • All applications • All audiences |