

SHARE Museums East

# Evaluation toolkit For Museums



Time and Tide Museum Takeover day – Students making video in gallery ©Ruth Stanley

# ACKNOWLEDGEMENTS

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## Find out more

Please visit [sharemuseumseast.org.uk](http://sharemuseumseast.org.uk)

## Feedback

Your opinions on the usefulness and content of the toolkit are very much welcomed. To provide feedback, please get in touch with:

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**THIS ICON WILL  
RETURN YOU TO  
THE CONTENTS  
PAGE**

# CONTENTS

---

<b>1</b>	<b>Introduction</b>	<b>1</b>
<b>2</b>	<b>What is evaluation? FAQs</b>	<b>3</b>
<b>3</b>	<b>How can evaluation help me?</b>	<b>11</b>

---

<b>1</b>	<b>FEATURE</b>	
	<b>Evaluation and Museum Accreditation</b>	<b>16</b>

---

<b>4</b>	<b>The basics</b>	
	<i>What you need to know before you get started</i>	<b>19</b>

---

<b>2</b>	<b>FEATURE</b>	
	<b>Evaluation and Inspiring Learning For All (ILFA)</b>	<b>24</b>

---

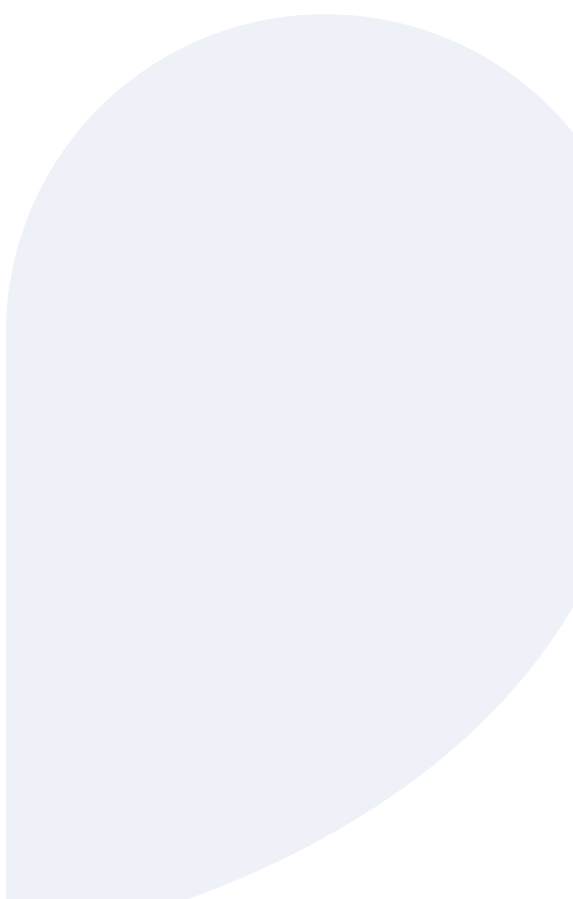
<b>5</b>	<b>Getting started</b>	
	<i>Planning your evaluation and using the evaluation checklist</i>	<b>31</b>

---

<b>3</b>	<b>FEATURE</b>	
	<b>Other tools and frameworks</b>	<b>35</b>

---

<b>6</b>	<b>What data collection methods are out there?</b>	<b>38</b>
<b>7</b>	<b>Making Sense Of Your Data</b>	<b>61</b>
<b>8</b>	<b>Communicating your results</b>	<b>67</b>
<b>9</b>	<b>Other issues</b>	
	<i>Ethical and lawful evaluation</i>	<b>74</b>
<b>10</b>	<b>Evaluation Planning Tool</b>	<b>79</b>
<b>11</b>	<b>Index of key terms</b>	<b>82</b>
<b>12</b>	<b>External Resources</b>	<b>85</b>





**Several toolkits and books on evaluation already exist, many of which are useful and practical sources of information. However, when this toolkit was first produced in 2008, a review of the available resources revealed that some were not specific enough to museums, and few, if any, provided the full range of information needed for a museum practitioner to carry out, commission or manage evaluation at that time.**

# 1. INTRODUCTION

This toolkit was put together by compiling all the relevant information in these sources, as well as answers to the many practical evaluation questions often posed by museums. A decade on, this second edition has been updated to take account of changes in museums, in technology and to legislation, to provide comprehensive and current guidance for museum practitioners. As such it contains new information and signposts you to more recently published resources that provide practical and sensible guidance.

The updated toolkit has been produced with the support of Arts Council England and was commissioned by SHARE Museums East, which is hosted and delivered by Norfolk Museums Service, a National Portfolio Organisation. It is therefore aimed at museums but it may have wider appeal within the arts sector. It is intended as a guide for organisations, both small and large, to provide them with the confidence to commission and recognise effective evaluation delivered by consultants on their behalf, and / or carry out evaluation themselves. Whether done in-house or outsourced, the point is to be able to demonstrate the effectiveness of your work, internally and to external stakeholders, so that you can carry forward and share the lessons learned. Learning is one of the most important outcomes that evaluation can offer organisations, not only so that they can develop effectively and keep pace with current agendas but also so that they can garner valuable support for the worthwhile services that they offer.

Two key points are worth bearing in mind before you use this toolkit:

1. Evaluation doesn't have to be expensive or take up all of your time – it needs to be appropriate and scaled to the activity that you want to evaluate. You do need to commit a realistic amount of time to evaluation, even if you are commissioning someone else to do it for you. The amount of time you put in when planning your evaluation will have a direct bearing on the quality of your results. A quickly and poorly written questionnaire, for example, is likely to yield poor data. Evaluation should be considered at the planning stages of your project or activity – this cannot be stressed enough.
2. This toolkit contains examples of different evaluation methods and recommendations to other resources, but these are all included as reference material, rather than as templates that should be adopted as they stand. It is not advisable to use an existing template for any evaluation if it does not ask the questions you would like answered or fulfil what you want to achieve from the evaluation.

Peppered throughout are links to external websites. They are collated as a list, with explanatory notes, in External Resources [Section 12](#). Whilst we can't take responsibility for this content remaining live, if you find that links no longer work then do get in touch and we will endeavour to update them.

**2.**

# **WHAT IS EVALUATION?**

**FAQS**

## 2.

# WHAT IS EVALUATION? FAQs

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### Monitoring and evaluation: are they different?

Monitoring and evaluation are two different things but are often confused. Monitoring is about the ongoing collection and analysis of information to 'spot check' the progress of an activity at any given time. For example, this might be the collection of visitor figures over a period of time and noting month by month whether they go up or down. In this way it can be a useful project management tool [Section 3](#). Evaluation, on the other hand, occurs at a specific point in time. It may use monitoring information as well as other data to look at the progress made against benchmarks set earlier in the activity. It is a way of measuring the effect and / or performance throughout the activity and may question its overall direction and the benchmarks themselves. For example, in looking at your visitor figures, you might then question whether or not you have achieved your aim of increasing visitor figures and if so, why this is the case. Evaluation, when done well, can also be about the 'how' and 'why' of what worked and what didn't. In this way it can help you and others to understand what it is that you need to continue to do, modify or completely overhaul in future if you are to carry out a similar project or activity. The point is to be able to demonstrate the effectiveness of your work, internally and to external stakeholders, so that you can carry forward and share the lessons learned. Learning is one of the most important outcomes that evaluation can offer organisations, not only so that they can develop effectively and keep pace with current agendas but also so that they can garner valuable support for the worthwhile services that they offer.

### What are the different kinds of evaluation?

The [index of key terms](#) covers some of the different types of evaluation but it is also worth explaining them here in more detail.

**Front-end evaluation** occurs during the planning stages of a project or activity, when data is analysed to help assess the value of plans before resources are committed to developing the project. It is used particularly during the planning stages of museum and gallery [redevelopment](#)<sup>1</sup>. Front-end evaluation includes:

- The process of consulting people as to their expectations of the project's outcomes and their needs (e.g. how can this museum be developed in a way that is inclusive and accessible to everyone).
- Existing national or local data that may provide information about your baseline audience and target audience.
- Surveys set up specifically for the project to gauge your target audience's current knowledge.

**Formative evaluation** occurs during the process or development of your project or activity. It may involve testing out a prototype or mock-up (e.g. display, text panel) with your users and refining the model until it is sufficiently improved. This means that you do not commit all of your resources to the





final product without knowing if it works in practice (e.g. is accessible, readily understood or works mechanically, in the case of interactive exhibits?). It can also include other kinds of evaluation that take place while a project is underway, such as staff team meetings to monitor and assess how well a project is progressing with a view to making amendments to the plan if needed. At this point you are considering the question, 'are we getting to where we want to be?' Formative evaluation is a particularly useful approach when piloting an activity, or a new way of working.

“

**Interactive exhibits demand formative evaluation. Those things that are designed for people to use, to handle, to sit on or to manipulate must be tested. If this is not done, breakages and breakdowns are inevitable. Some designers of interactive exhibits would see the whole life of the exhibit as being one long process of formative evaluation<sup>†</sup>.**”

Eilean Hooper-Greenhill



Epping Forest & District Museum ©David Kirkham

**Summative evaluation** occurs at the end of your project or activity, when you may wish to assess the impact of the 'finished product', be it a new gallery, an outreach session or a new brochure. At this point, you are looking back at the project to ask questions such as 'Did we meet our aims and objectives?' or 'What worked well and what didn't?'

The case study on the following page sets out the different stages of evaluation. Not all projects or activities will need to be evaluated using all three stages but particularly where you are running a large project (such as a museum redevelopment) it can be a good idea to incorporate front-end and / or formative evaluation with summative evaluation.



<sup>†</sup> *Museums and their Visitors*. 1994. London, Routledge. p. 78

# CASE STUDY

A fictional example of a gallery redevelopment

## Redevelopment of a new gallery on the Romans

### Front-end evaluation

- Who visits the museum currently?
- Are our museum visitors representative of our local population?
- What are the needs of these visitors and any non-visitor groups?
- How would they like to see material displayed and interpreted?
- What do potential audiences know already about the topic?
- What could we change about the museum to encourage more people to get involved?

### Formative evaluation

- Do the proposed interactives:
  - work mechanically?
  - help visitors learn?
  - get the intended message across?
  - make for an enjoyable experience?
- Are the exhibition plans shaping up as our audiences requested?
- Do the mock-up displays reflect what people asked for?
- How do our plans need to be adapted?

### Project aim(s) and objectives

### Summative evaluation

- Did we meet our aim / objectives?
- Did we develop the new gallery according to visitors and non-visitors' needs and desires?
- What were the unexpected outcomes?

### Front-end evaluation

- What lessons learned can we carry forward from the last redevelopment?

## Redevelopment of a new gallery on the Anglo Saxons

Many museums use this approach advocated here, you can find out more [here<sup>2</sup>](#) and [here<sup>3</sup>](#)



**Retrospective evaluation** happens when you realise that it is too late to even carry out summative evaluation, for example, following the closure of a temporary exhibition. Retrospective evaluation is not recommended, as it will probably mean that you have gaps in your data sources (leading to an unbalanced evaluation). For example, you may find that you have to use visitors' quotes given in a newspaper article but you will have had no control over how these quotes were gathered or presented. Hence you will not know how representative or reliable they are of the visitors' feedback.

### Learning from evaluation

Sometimes, different types of evaluation can become blurred. For example, if the results from a summative evaluation are subsequently used in planning a similar exercise in the future (which is an advisable scenario), then they become a form of front-end evaluation (looking back at what was successful or needed developing from past experience).

Evaluation should be about learning. If you do not seek to learn from evaluation, then it is a lost opportunity for you and your organisation.

### I wish to run a certain type of activity or project. Is there a 'right' evaluation method to use?

The answer to this is not straightforward. It all depends on the resources you have for the evaluation, the people that you are consulting for feedback, and the type of activity or project you are running. So, your evaluation method should be tailored to your activity and your audience. To put this in context, if you are working with children, then you cannot expect them to complete a long and detailed questionnaire. You might instead choose to observe the children's progress, gather informal feedback from parents or teachers and ask simple questions of the children to which they could respond with a 'show of hands'.

These methods are simple but if done well, [asking 'good' questions](#), they will provide you with valid information that can be analysed and interpreted for the purposes of evaluation. Similarly, if you are running a long-term project, then you should expect to carry out a more detailed evaluation (relying on several types of data collection) than would be the case with the assessment of a single event.

### Does evaluation need to be complicated to be valid? What makes it robust?

The simple answer to this is 'no'. Evaluation can be as simple or as sophisticated as you make it. In 2019, Evaluation Support Scotland brought grantees together to share their evaluation successes and learning. One of their top tips was *"You aren't a social scientist. It doesn't need to be perfect. Learn to live with complexity and imperfection"* [see their other top tips here](#)<sup>4</sup>. This is really important; don't be put off evaluating because you think it needs to be complicated to be valid. What makes evaluation robust is giving yourself enough time to devise an effective plan [Section 5](#), phrasing your questions appropriately [Section 6.2](#), giving due consideration to the various perspectives of those involved [Section 4](#), analysing and presenting the outcomes in a way appropriate to your audience and acting on them [Sections 7 and 8](#). Funders usually offer guidance on what they would like to see in an evaluation plan, and there is no reason why you can't also incorporate in this plan your own questions that you would like the evaluation to answer (if these diverge from the funders'). Being clear about the purpose of the evaluation is really important - ask yourself along the way, are we collecting information that will help us to answer what we want or need to find out? If the answer is 'no' then it's probably time to re-think your plan.



### Which is better: in-house evaluation or commissioned evaluation?

Both have their merits and disadvantages. Commissioned evaluation is likely to cost more but will provide you with an independent and impartial assessment. However, your external evaluator may not have the necessary insight into your museum and how it works to produce recommendations that will be suitable and practical in this context – a good evaluator can overcome this through transparent conversations with the commissioning client. There is some guidance elsewhere in this toolkit on how to write an evaluation brief and commission an external evaluator, with signposting to other useful resources [Section 5](#). In-house evaluation or 'self-evaluation' can be deemed to be less objective or robust, as people may tell you things that they think you want to hear or because you are less able to judge yourself or your organisation objectively. However, you may have a deeper understanding of how and why things worked or did not work and may be better placed to make recommendations for the future that are realistic for your organisation to achieve.

Either way, your evaluation should be honest. If it seeks to whitewash over problems or unsuccessful aspects, and instead to focus on reporting solely what worked or went well, then it could be accused of being biased, incomplete and is unlikely to be useful as a learning exercise for others. Reports that do this tend to be more about advocacy than evaluation. Whilst evaluation findings can be used to inform advocacy, the two should not be confused. It can feel daunting to share with external audiences those evaluation findings that show things did not go to plan. However, if you are able to articulate what you learnt from this, how you would do things differently in future, and / or potential issues that others should be aware of, then this makes for interesting reading and a useful resource for others to build on.

### How can you make evaluation satisfy the needs of your organisation, your audiences and your funders?

This can be tricky but it is possible. Your organisation is likely to want to understand what worked and what didn't - and the how and why of this process. Your audiences (users and non-users) will want to know if they commit time to providing you with feedback or answering your questions, that the information is used and it makes a difference. Your funders or financial contributors, will want to know that their support is having a positive effect, sometimes how much of an effect, and often how this relates to their own priorities. In considering the interests of each group, you may find that some will be complimentary and some may diverge. For example, when demonstrating a need for funding, you probably will have to think about where there is an overlap in priorities (i) for people involved with the activity / project, (ii) with those of your organisation, and (iii) with those of your benefactor.

There may be a temptation to limit reports to your funders to those positive news stories that you think they want to hear. If you are candid about the activities that didn't turn out as anticipated (and why), and about any unexpected outcomes, whether positive or negative, then your judgment of the successes is likely to be more credible. In this way you can provide a 'warts and all' assessment that works for both internal and external readers.

Your audiences (users and potential non-users) are much more likely to get involved and stay involved if they feel that you take on board what they have to say and make meaningful changes as a result, and that you offer something that they connect with because you've listened to their needs. More on this is covered by the next FAQ.



## Where does evaluation sit with regard to consultation and co-production?

### What do these terms mean anyway?

Consultation as an idea has been around for a long time. It's a term that gets used quite loosely to refer to the process of asking interested parties ('stakeholders') what their opinion is on something. In 1969 Sherry Arnstein published a framework called the [Ladder of Citizen Participation](#)<sup>5</sup> on which there are eight rungs ranging from *manipulation* at the bottom (to educate participants who aren't really participating at all) all the way up to citizen control at the top (public participants have complete control over decision making to deliver an initiative, including how funds are spent). *Consultation* within this definition falls half way up and is seen as being tokenistic – there is no guarantee that if someone provides their opinion (when asked) that it will effect any change. *Stakeholder engagement* is not a term that Arnstein used but could be considered to be slightly further up the ladder than consultation. *Co-production* (sometimes called *co-curation*) would essentially feature on one of the top rungs of the ladder. In this scenario, participants work in partnership with the museum at every stage of an activity, and this relationship is an equal one – no one person or organisation holds all the power.

Evaluation can aim to and actually use the results of consultation, stakeholder engagement and co-production as part of the assessment process. There is nothing wrong with *consultation*, for example if you want to find out from a group of children whether they enjoyed a handling activity or not (and why, with a view to improving it). More along the lines of stakeholder engagement would be asking a group of children to get more involved by testing a pilot activity for school holiday audiences and to provide feedback to more specific questions. The aim here would be to develop something that encourages repeat visits. If you recruited a group of children, asked them to agree amongst themselves on a topic for the activity, to research that topic, design the session (and even deliver it to their peers) then this would count as *co-production*. The important thing is not to say that you are doing stakeholder engagement when really it's a simple consultation, or to call a project 'co-produced' when in fact the decision making has not been delegated entirely to your participants. You need to be clear yourself and communicate to your participants what their involvement will entail, how their feedback or answers to questions will be used and what level of power they will have to influence decisions. More on involving participants, and the benefits of this, including co-production, is covered in [Section 4](#). You can also read more about Participatory Evaluation in [Feature 3](#).

### How much should evaluation cost?

It is important to plan your evaluation with realistic resources in mind and to build in enough time for your museum to reflect on its findings and how to act on them. There is no one calculation to determine the 'right' cost of evaluation. As a rule of thumb, some specialists advise that it should represent 10% of the overall budget for the project or activity you are evaluating. However, in a large project, such as £1 million museum re-development, then allocating £100,000 to its evaluation might seem very high. It is more realistic to plan to spend between 1% and 10% of your overall budget on evaluation, depending on the programme's overall planned cost, whether it's a pilot or innovative project (then the evaluation budget should be a higher proportion of the total budget) and the scope of what you want the evaluation to achieve.



The evaluation budget will also depend on whether you are commissioning an individual or agency to develop and deliver your evaluation for you [Section 5](#), or if it's to be done 'in-house'. Some of the things you will need to account for are:

- The daily cost of staff working on the evaluation (whether they are your employees, or external consultants) and all the stages they need to deliver, from planning, through to collecting information, analysing it and reporting findings. If volunteers are helping to deliver your evaluation, will their existing roles need to be back-filled by others and could there be costs involved with this?
- Any reasonable expenses incurred by staff (e.g. travel, subsistence)
- Whether you need to pay an agency to recruit participants (particularly non-users)
- Any training you might need to deliver if staff or volunteers are to get involved with information collection and need the skills and confidence to do this
- The cost of data collection activities – for example with a focus group you may need to pay for room hire, refreshments, the participants' costs (e.g. travel, childcare), use of specialist equipment (recording devices).

## Norwich Castle: The Great Hall Inspiration



### Creating a Medieval Experience



Visitors are transported back in time with Norwich Castle presented as it was during its time as a Norman Royal Palace, with ambient sounds, lighting and smells making it a truly immersive experience.

The interpretation can be updated seasonally and to focus on the stories of the Castle at Christmas and the Castle Under Siege.



### Great Hall Inspiration



How can we prevent the Great Hall from becoming static?

- Lighting
- Smells
- Movement
- Sounds
- Seasonal changes
- Individual stories



**3.**

**HOW CAN  
EVALUATION  
HELP ME?**

### 3.

# HOW CAN EVALUATION HELP ME?

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**In its purest sense evaluation should be seen as an opportunity for us to learn and improve our professional practice. It should not be done to point fingers or assign blame. Rather it should help create a culture where we're able to take risks and share what hasn't gone so well<sup>†</sup>.** ”

Nicky Boyd

Evaluation, as has already been pointed out, is about the 'how' and 'why' of what worked well or what did not work well. For example, rather than just telling you that people enjoyed or did not enjoy the outreach session, if you ask the right questions, you will find out why they did or did not enjoy it and how you can repeat your successes or improve upon the less successful aspects of the session in future.

This sort of insight, about the 'how' and 'why', is often the most useful learning to share with others. It provides them with tangible building blocks for their own work, knowing what they can repeat or what mistakes they should try to avoid making. It also means that we are not continually 'reinventing the wheel' when it comes to project design.

Here are just some of the things that evaluation can help museum practitioners do, many of them are interrelated. This list of examples, which is not exhaustive, has been compiled based on the author's own experiences, a review of various sources consulted [Section 12](#) and from feedback by participants at training sessions delivered by the author. They show broadly how evaluation can help you in terms of creating and maintaining a reputation for integrity and *quality*, understanding better what difference, if any, your efforts are making for *others*, and understanding successful processes and delivering effective project *management*.

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<sup>†</sup> [See here for the full article](#)







## QUALITY

This is essential if you want to build your audiences, encourage other organisations and individuals to work with you in partnership (which can further extend your reach and provide opportunities for learning from peers elsewhere) and makes you attractive to those in a position to provide financial support.



## OTHERS

This is relevant to Museum Accreditation Requirements under 'Users and their Experiences'  
[Feature 1](#)



## MANAGEMENT

Within a museum setting, where discrete pieces of work or activities are being delivered such as gallery or museum redevelopments, permanent and temporary exhibitions, talks and outreach programmes, learning events, workforce development initiatives, then evaluation has a vital part to play in the 'project management' of these activities. With budgets becoming ever tighter, and a greater emphasis being placed on income generation from multiple sources, then knowing where and how you can work more effectively with your resources is a valuable insight to have.





## QUALITY

### Ensure that learning is shared and acted upon within the organisation

Learning has already been stressed as an important outcome of evaluation. Just as important as this is acting upon and sharing the learning, so that it is carried forward in the future and communicated to your colleagues. If learning is not shared, it will be lost when individuals leave the organisation and take their learning elsewhere. A learning organisation is one that demonstrates to outsiders that it keeps pace with the needs of society.

### Defines the quality of what we do

Often when it comes to evaluation and demonstrating impact, it can be easy just to report against the quantity of what we offer, such as the number of visitors to an exhibition or the number of events held. This doesn't necessarily get to the crux of what museums can offer people; evaluation can go one step further and offer an insight into the quality of what we do. This means that we are able to articulate what our intrinsic value is, not only in terms of what outputs we deliver (e.g. visitors, exhibitions, events) but also in terms of the difference that these things make to people's lives (e.g. offering opportunities to learn new skills, build new relationships or even improve community spirit).

“

**It's about identifying a good story to tell and telling it loud and often. Find simple stories and statistics you can repeat. Identify what those people of influence want and how you can deliver that in the language they understand<sup>†</sup>.** ”

John Roles

### Demonstrate to funders the impact of the organisation

Funders usually require some level of evaluation of projects or activities that they sponsor and will often stipulate what this is before you start your funded activity, and will ask to see your evaluation plans before committing all or part of their investment. The level of detail of evaluation materials they expect can vary, depending on the funder or the amount of the grant. Some prefer a certain approach over others (see [Section 5](#) for planning your evaluation), most will ask you to consider what your objectives and outcomes will be, and how these fit with their own organisational goals. Providing monitoring information to funders in the form of progress or update reports, particularly for larger projects, is quite common, and all will usually require that you produce an evaluation report. A quite common question asked by museums is how to balance what they perceive to be are the competing interests of funders (e.g. did you deliver what you said you would?) against what the museum would like to find out (e.g. what worked well, what didn't work well, what actions should we take from this?). Done well, evaluation can, and should, do both at the same time. Funders are usually impressed with those organisations that take on board what they have learnt through evaluation, and to identify and share this learning process you have to be honest and not gloss over the challenges.

### Strengthen accountability

Evaluation can demonstrate to you, your organisation and external stakeholders how effectively you are running a project, programme or activity. This can help make individuals delivering or managing the work more confident and focused on how it should develop. It gives them something to aim for and a framework against which to measure progress, therefore helping to build team vision.

<sup>†</sup> Quoted in *Museum Practice*, Issue 49 (2010)



## OTHERS

### Motivate staff and users

Knowing that you are achieving your goals, or knowing what you need to do differently to achieve them, can also be motivational for staff and team morale. If museum users and other stakeholders are aware that you take their feedback into account, it can motivate them, and in some cases new users, into engaging more with museum practitioners. It therefore creates the opportunity in museums for dialogue between colleagues and with users.

### Enable us to understand our audiences better (being more user-focused) and improve the services we offer them

This is important as museum collections are for the enjoyment and benefit of society. So, museums should play a key role by actively engaging with the public, and therefore should strive to ensure that they are user-focused. This includes considering current users and non-users. Some questions that evaluation might help to answer in this respect are:

- Are our visitors representative of local or wider communities? If they aren't, is this because we are not presenting ourselves in an accessible way or for another reason?
- Do visitors understand our intended message, for example, how we interpret our collections through events or exhibitions? If they don't, then why is this?
- How do users and non-users learn in an informal learning setting? How can we use what we know about their informal learning processes to make sure we cater for their needs?
- What can we do to encourage more and wider range of people to use this museum?



**MANAGEMENT**

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**Determine if a project or activity's aims, objectives and outcomes are being or have been met**

When planning a project or activity, you will set yourself aims, objectives and outcomes, these might include 'learning outcomes' or 'social outcomes' [Feature 2](#). Evaluation can help you assess to what extent you are achieving or have achieved these goals and what factors affect their success. It can also reveal unexpected outcomes, those things or 'nuggets' of information which you couldn't have foreseen but which are often the most interesting to find out about. This leads on to another key point that demonstrates why it is important to consider your evaluation at the start of your project or activity, when you are planning your goals. At this stage, you need to make sure that there will be some way of assessing whether or not you have achieved your goals. If you aren't going to be able to do this, then your evaluation will be flawed. So you do need to consider, for each of your goals, what your measure of success will be. This is covered in [Section 4](#).

**Identify strengths and weaknesses (and where resources should be directed in future)**

This will provide you with an insight into what contributed to the effectiveness of the project or activity and how you could make future projects or activities more effective. You may decide that no improvements could be made and so resources would be best used elsewhere. In short, evaluation can help inform the development of future projects and set their direction.

**Anticipate problems that can be resolved early on**

If you always leave evaluation until the very end, then sometimes it can be too late to act on the findings, particularly if you are not going to repeat the exercise again. Formative evaluation, for example, can help shape the final product, so that your resources are not invested in something that is unusable. Often, monitoring will help you to assess the performance of what you are doing. However, it's a good idea to take time to think in more detail at the early or mid stages of your project about the data collected so far: whether it suggests you are on track to meet your aims or flags up any unexpected outcomes. This does not apply only to long-term activities. If, for example, you are running a series of outreach sessions, then you could get a simple idea of how well they are going by looking briefly at the audience or staff feedback following each session to help shape subsequent sessions.







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# EVALUATION AND MUSEUM ACCREDITATION

Consulting with the people who use and visit your museum is a requirement of the Accreditation standard for UK museums. Their feedback and input will hopefully lead to increased visitor satisfaction and numbers, as well as supporting your museum to plan for the future.

When submitting an Accreditation application or return, you will need to provide evidence of how your museum is meeting the requirements to:

- 1 Be accessible to the public
- 2 Understand and develop your audiences
- 3 Engage with your users, and improve their experience

Use the [Accreditation Guidance](#)<sup>1</sup> document to help break down what you need to provide evidence for, making sure it is appropriate to the type and size of your museum.

Two useful resources on being more user-focused are provided by [AIM](#)<sup>2</sup> and the [Collections Trust](#)<sup>3</sup>.

Below are some ideas of how your evaluation work can support Accreditation:

## 1. BE ACCESSIBLE TO THE PUBLIC

- You will need to provide evidence that you have carried out an access assessment of your site
- You will need to have an access policy or statement developed in consultation with your users

### TOP TIP

*Consider inviting in a local group to test out your sites and services. Record their feedback and make sure any recommendations inform your future plans. Make sure you share your plans on your website!*

## 2. UNDERSTAND WHO USES YOUR MUSEUM, AND WHO DOESN'T

- You will need to provide evidence that you are aware of the breadth of current users, informed by audience data that you have collected
- You will need to consult users and non-users on your services and how to meet their needs

### TOP TIP

*Use social media to poll people on their feedback to your current exhibition – encouraging those who didn't visit to give their input*

## 3. TO USE INFORMATION TO ASSESS YOUR USERS' NEEDS

- You need to have a process in place for responding to user and non-user comments
- You will need to provide evidence of how you analyse and use user feedback to plan improvements

### TOP TIP

*Type up the comments from your day book or comments book, then share at a Trustees meeting. Comments should stimulate discussion which can be recorded and later used for Forward Planning.*

## 3. HAVE A PLAN FOR DEVELOPING YOUR RANGE OF USERS

- Bring together all your user research and evaluation in a plan for how to increase the range of numbers of visitors
- You will need to have an idea of how you are going to measure the success of your plans

### TOP TIP

*You can include your plans in your Forward / Business plan, rather than having a separate document.*

**4.**

# **THE BASICS**

**What you need to know  
before you get started**



# 4. THE BASICS

## What you need to know before you get started

“

If you judge, investigate. ”

Seneca

**Quantitative data**, as its name suggests, is information presented in numeric form, which can be counted or compared on a scale. Quantitative data is easily measured, e.g. the number of participants at an event, the number of people who agree with a statement. **Qualitative data** on the other hand relates to information presented in narrative form that is usually textually or verbally rich in description.

**Inputs\*** – turn the word around and you have all the things ‘put in’ (or resources) to deliver the activity or project (e.g. time, funding). **Outputs\*** are all the things that are delivered as a result, such as courses, exhibitions, talks, the number of people who attended these things. It can also include resources that have been developed, such as volunteer documentation (e.g. a handbook, recruitment guide, job descriptions), a website or a forward plan.

**Outcomes\*** are all the things that happen as a result of your outputs, such as the fact that people are more likely to return to attend another course, exhibition or talk. These are usually qualitative measures that describe the difference made to individuals or groups of people. **Impacts\*** are the longer term benefits that arise, usually from outcomes. Sometimes outcomes are distinguished into short-, medium- and long-term outcomes. Longer-term outcomes can be considered the same as impacts.

Aims and objectives are often confused.

**Aims** are about the overarching things that you are setting out to achieve. For example,

- ‘To increase the range of visitors to the museum’

**Objectives** set out what needs to be done to achieve your aims and can be one of the means by which you evaluate the project or activity. For example,

- ‘To sustain the participation of existing visitor types as identified in the last exit survey’
- ‘To increase participation by younger people (16–25) by 5% within the following 12 months’
- ‘To deliver a talks programme during the winter period that encourages new audiences in to the museum (at least 10% of participants overall will not have attended before)’



### DID YOU KNOW?

#### Your objectives should always be ‘SMART’



**S**pecific  
**M**easurable  
**A**chievable  
**R**elevant  
**T**ime-specific.

For example, it is not possible to demonstrate that you have achieved an objective if it is not measurable. A ‘woolly’ objective will be difficult to measure. An unachievable objective is one that is setting you up to fail. An irrelevant or non-time specific objective should not feature in your plans as time and resources should not be committed trying to fulfil it.

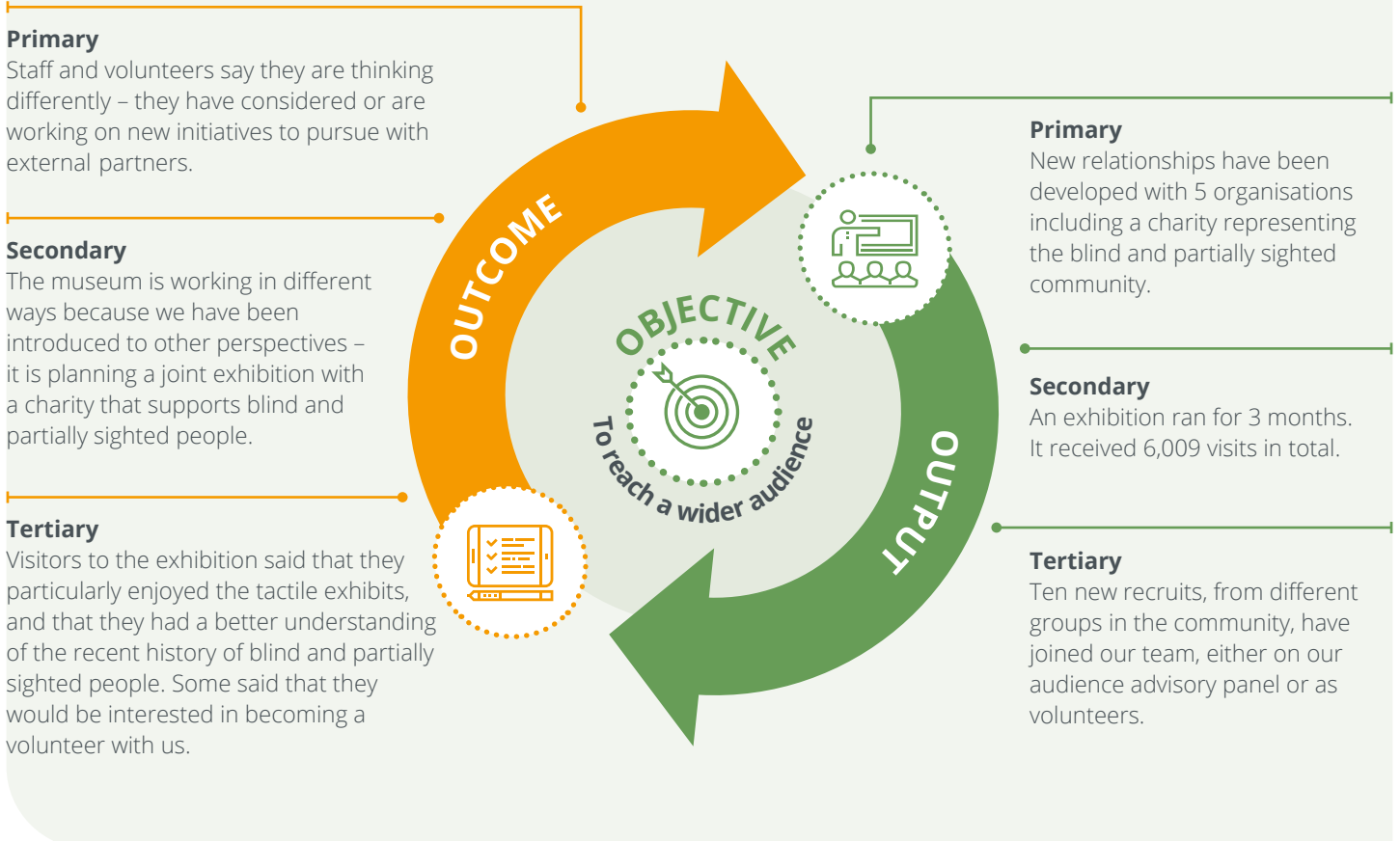
\*Terms such as these can be defined in a number of ways. The explanations given here define the use of these terms in this toolkit and are covered more fully in the ‘Index of key terms’ [Section 11](#)

# CASE STUDY A fictional example of a museum seeking to broaden its audiences

I'm still confused! What's the difference between outcomes, outputs and objectives?

WHAT?	DEFINITION	PRIMARY EXAMPLES
 <b>OBJECTIVE</b>	An objective is a step, probably one of several, that helps you to achieve your overall goal or aim	To broker new relationships in the next 18 months with external organisations such as local community and voluntary groups
 <b>OUTCOME</b>	An outcome is a difference that will arise (a beneficial change for a person, a group of people or an organisation) because of your efforts	Staff and volunteers say they are thinking differently – they have considered or are working on new initiatives to pursue with external partners
 <b>OUTPUT</b>	An output is what you deliver to help you achieve both your objectives and planned outcomes	New relationships have been developed with 5 organisations including a charity representing the blind and partially sighted community

They are often linked so it can be easy to get them confused. The following example scenario shows how they relate to one another, using the information from the table above, and how they relate to other outputs and outcomes that may be planned or arise.



## Baseline

Your baseline is a measurement that you take or have to hand before you start your evaluation. It is the reference data that you compare future measurements or observations against. It gives you an idea of the state of the situation before your project or activity begins. In some situations, you need to be able to demonstrate the amount of progress made, or 'distance travelled', by participants or the organisation during the life of your project, for example how training may have given front-of-house staff more knowledge and confidence about specific museum collections. It would help to have a measurement of their knowledge and confidence before and after the training to identify what change, if any, there had been.

## Measure of success

This refers to how you will demonstrate you have met your objectives; what will you measure the success or otherwise of your objective against? You can also use your intended outcomes here to help you articulate your measures of success. For example:

**Objectives:** By the end of the gallery refurbishment, to provide two training sessions, for at least 12 volunteers in total. One session to provide them with the skills to deliver tours to visitors. One session to provide them with information and knowledge on the specific displays in the newly installed gallery.

**Outcomes:** People attending the training have increased confidence of giving tours to visitors. They have increased knowledge of the subject of the gallery.

**Measures of success:** At least half the people attending the training indicate, via questionnaire, that their confidence levels in giving tours increased on a scale of 1-10 (where they answered the survey before and after the training). All attendees were able to cite at least three new pieces of information that they had learned. The rota for delivering tours is fully covered by volunteers.

If you are working as part of a team, it is a good idea to decide early on who will take responsibility for monitoring and assessing which measures of success.

## Open and closed questions

An **open question** allows for the respondent to give a spontaneous and unstructured response. They are characterised by opening with 'how' and 'what' as well as descriptive verbs such as 'describe' and 'explain' (e.g. 'Describe how you felt when ...'). Open ended questions are useful when you need to gather a rich narrative of feedback from your respondents, e.g. in interviews, focus groups, informal conversations and sometimes in questionnaires. A **closed question**, however, forces respondents to choose either a 'yes' or 'no' answer or an answer from a set of predefined categories (e.g. 'Do you like this exhibit?', 'Do you prefer this exhibition or the previous exhibition?'). Responses to closed questions are easier and less time-consuming to collate and analyse, but will usually not provide you with an understanding of why the person answered the way that they did. This can only be achieved by following up with an open question asking them to explain their response.

## Leading questions

These are questions that are phrased in such a way as to suggest that there is a right answer. They bias the respondent to reply in a desired way. So, for example, if you asked someone, 'When are you next planning to visit this museum?', without having established if they are intending to visit the museum again, you are presupposing a positive response from the individual you are questioning. Asking leading questions should always be avoided.



## Sampling

Sampling is a way of choosing participants for an evaluation, in some cases so that they are representative of a wider population. There are different methods of sampling, which include the following:

**Random sampling** is where a group of subjects is selected entirely by chance and each member of the population has an equal chance of being included in the sample. One way of doing this would be to use a list of the individuals in the population you are investigating, e.g. all the children in a school, and go down the list selecting participants using a random number table. There are free Apps available online that can generate random numbers assigned to your population.

**Systematic sampling** is similar to the above, however, selection is done using a systematic method, e.g. every tenth person on a list. You need to make sure there is no pattern in the population or on your list that distorts your sample.

**Stratified sampling** is where the total population are grouped according to characteristics (e.g. age, gender, ethnicity) and you select randomly from each group so that your overall number of target participants are proportionate to those in the total population.

**Quota sampling** is similar to stratified sampling, however, in this case, an interviewer will have been instructed as to how many people from each sub-group of the population to select (or observe), e.g. 30 females and 30 males. It is not considered 'random' sampling, since, for example, if you are stopping people in the museum or in the street, it is tempting to select people who look more helpful or who are more like yourself.

## Involving participants

You need to consider which groups of people you wish to involve and why. For example, do you need to target certain groups of people (such as museum staff and volunteers, non-users and current users, teachers and parents, children and young people, older people, students) because you are specifically seeking the views of these people? Why are you seeking their views? Is it because they are experts in their field and you need that expertise, or perhaps it's to check what potential audiences already know and would like to find out on the topic of interest? Going one step further, you may be interested in 'co-curation' or 'co-production' whereby you encourage a much greater participatory role for audiences as they potentially become involved with the whole process of designing and delivering something such as an exhibition, website or research project, and that includes how the budget is spent. This means handing over the decision making process to the group who are producing the deliverable. Museums have become increasingly interested in this in recent years. When done successfully, it can result in a more meaningful and deeper engagement with individuals, helping to build vital and sustainable relationships with the communities you serve, and meaning that your collections are interpreted in a way that is more likely to resonate with and represent them. There are more resources about co-production in museums here:

- [A blog post by Ed Rodley, a museum professional from the US<sup>1</sup>](#)
- [A short film giving a practical example of participatory engagement<sup>2</sup>](#)
- [An engaging presentation by Nina Simon, Museum of Art and History, Santa Cruz<sup>3</sup>](#)
- [The Participatory Museum, a book by Nina Simon<sup>4</sup>](#)
- [Power to the People, a self-assessment framework for participatory practice<sup>5</sup>](#)



### So how do I actually go about encouraging participation?

Be clear from the start about your expectations of their role and how much time they are likely to need to commit. You need to think carefully too about what they might get out of participating. This needs to be agreed and communicated both within your organisation and with those you are seeking to involve. How easy it is to find people to take part depends on various things, for example whether you already have links to this group of people or not, the amount of time you are asking them to commit, and whether your offer is something that interests them.

One of the first things to be aware of is that it takes time to build relationships and gain trust. It is important not to underestimate this and to allow plenty of time if it's not an audience you have worked with before; you may need to trial several ways of working that are very different to what you are used to, if you are to successfully enlist their participation and sustain this.

There are various tangible ways in which you can reach people and ask them to get involved:

- Using your website to publicise what you would like to hear from people about
- Using social media and asking people to share your posts or tweets widely
- Calling on your existing users through any Friends or Membership scheme you may have (as long as this is GDPR compliant, see [Section 9](#))
- Employing the services of a Market Research company (obviously this will involve costs)
- Using existing partnerships and building new ones, to tap into their audiences
- Asking friends or family to get involved, to spread the word, and to recommend personal contacts that might be useful to you ('it's not what you know, it's who you know')
- Speaking to your local authority about any public engagement panels that they may have already set up
- Getting out and about in public and approaching people. Base yourself somewhere with a good footfall but sheltered enough that you can have a conversation without it being curtailed by bad weather. Local libraries and shopping malls can work well.
- You could consider setting up and maintaining Advisory Panels – these are groups of people who sign up to provide you with their input over a longer term, e.g. until further notice, or at different stages of a project. This has become more commonplace in museums in recent years [read how Glasgow Museums did that here](#)<sup>6</sup>.

It's important to consider any potential barriers to people participating and how you could provide additional support to overcome these, for example, providing child care, hearing loop systems, translators and sign language interpreters and holding any meetings in venues or at times that are convenient for your participants. If you were to organise focus groups for teachers in the middle of the working day in term time it is unlikely to result in you finding many willing participants!





2

Museum of Cambridge ©David Kirkham

## EVALUATION AND INSPIRING LEARNING FOR ALL (ILFA)

**ILFA is a framework that was initially developed by the Museums, Libraries and Archives (MLA) Council. When this closed in 2011, responsibility for ILFA was transferred to Arts Council England where it was refreshed and now forms part of a suite of toolkits for arts and cultural organisations<sup>1</sup>**

ILFA helps practitioners to plan for, improve and articulate the learning that occurs in these contexts, including informal learning [Section 11](#). It is designed to enable organisations to improve and to measure the impact of their activities with all their stakeholders, such as external audiences, partners and its own workforce. A large and useful range of resources designed to help you use the framework are also provided and are well worth a [look<sup>2</sup>](#)

ILFA is intended to provide support in three stages;

- 1 **Planning** (assessing your strengths and planning where improvements are needed)
- 2 **Making improvements** (whether across your organisation or to specific activities or programmes)
- 3 **Providing evidence** (demonstrating the immediate and wider benefits that your organisation brings). The ways in which ILFA does this is explored more fully on the following page.

## 1 & 2 PLANNING AND MAKING IMPROVEMENTS

Central to the framework are *four key processes* (see overleaf) underpinned by principles leading to an accessible and inclusive organisation that stimulates and supports learning. There are checklists for each area that are available in the online resources mentioned above which help you to identify where your strengths are and where there may be areas that you could improve.

## 3. PROVIDING EVIDENCE

As already noted elsewhere in this toolkit [Section 4](#) you can consider the benefits or outcomes you are helping to bring about more immediately (i.e. in the short-term) and in contributing to wider changes (i.e. in the longer-term). ILFA provides you with the language to articulate these as *Generic Learning Outcomes* or GLOs (immediate benefits) and *Generic Social Outcomes* or GSOs (wider benefits).

### There are five GLOs:

- Knowledge and understanding
- Skills
- Attitudes and values
- Enjoyment, inspiration and creativity
- Action, behaviour and progression.

It is possible for you therefore to map the learning outcomes you achieve or plan to achieve for people against these GLOs which is useful when considering your goals and / or when analysing or reporting feedback and other information (e.g. your organisation's strategic documents and policies). Overleaf sets out in more detail what the GLOs could include.

### There are three GSOs:

- Health and Wellbeing
- Stronger and Safer Communities
- Strengthening Public Life

Within each GSO there are different related types of impact (for example under Stronger and Safer Communities there are five impacts such as 'improving group and intergroup dialogue and understanding' and 'supporting cultural diversity and identity'). In this way, the GSOs cover the wider impacts that can be made by organisations on their community and in contributing to local and national government policies and priorities. This is important for the reasons set out in [Section 3](#) relating to *creating and maintaining a reputation for integrity and quality* and because it means you are using a language that policy-makers understand. The GSOs are intended to be used internally, in planning and evaluating delivery, and not as a tool for use with audiences.

There are a range of indicators for each of the impacts sitting within the three GSO groups, some are outputs and some are outcomes and usefully there are resources that provide you with possible questions to ask of stakeholders and examples of evidence. Importantly, the outcomes all relate to the [GLOs<sup>3</sup>](#). Therefore, when used together, the GLOs and GSOs mean that you can communicate about your work with all types of people, whether they are audiences, colleagues, funders or people in local- or national-government.



## 1 &amp; 2

PLANNING AND MAKING IMPROVEMENTS *cont***PEOPLE****Providing more effective learning opportunities**

- Engage and consult with a broad range of people to develop learning opportunities
- Provide opportunities for people to learn
- Broaden the range of learning opportunities to engage with new and diverse users
- Stimulate discovery and research
- Evaluate learning outcomes of services, programmes and activities

**PLACES****Creating inspiring and accessible learning environments**

- Create environments that are conducive to learning
- Develop your staff to provide support for learners
- Promote yourself as a place for learning and inspiration and how to meet their needs

**PARTNERSHIPS****Building creative learning partnerships**

Identify potential partners and evaluate the benefits of working in partnership to support learning

- Work with these partners to plan and develop learning opportunities
- Invite people from outside the museum, archive or library to bring new perspectives and broaden the range and appeal of learning opportunities
- Invite people from outside the museum, archive or library to bring new perspectives and broaden the range and appeal of learning opportunities

**POLICIES, PLANS, PERFORMANCE****Placing learning at the heart of your activity**

- Identify and seek to influence national, regional or local initiatives
- Reflect national, regional and local developments in plans and priorities
- Demonstrate that your organisation is a learning organisation through staff development and evaluation processes
- Invite people from outside the museum, archive or library to bring new perspectives and broaden the range and appeal of learning opportunities
- Invite people from outside the museum, archive or library to bring new perspectives and broaden the range and appeal of learning opportunities

### 3. PROVIDING EVIDENCE *cont* GENERIC LEARNING OUTCOMES (GLOS)

#### Knowledge and understanding

- Knowing how to do something
- Learning facts or information which can be subject-specific, interdisciplinary / thematic, related to arts, culture, heritage
- About myself, my family, my community, the wider world
- Making sense of something
- Deepening understanding
- Learning how arts, cultural and heritage organisations operate
- Giving specific information – naming things, people or places
- Deepening understanding
- Making links and relationships between things
- Using prior knowledge in new ways

#### Skills

- Knowing how to do something
- Intellectual skills – reading, thinking critically and analytically, making judgments
- Key skills – numeracy, literacy, use of ICT, learning how to learn
- Information management skills – locating and using information, evaluating information, using information management systems
- Communication skills – writing, speaking, listening
- Social skills – meeting people, sharing, team working, remembering names, introducing others, showing an interest in the concerns of others
- Emotional skills – recognising the feelings of others, managing (intense) feelings, channeling energy into productive outcomes
- Physical skills – running, dancing, manipulation, making

Museum of Cambridge ©Stephen Brown

#### Attitudes and values

- Feelings and perceptions
- Opinions about ourselves, e.g. self-esteem
- Opinions or attitudes towards other people
- Attitudes towards an organisation
- Attitudes in relation to an experience, both positive and negative
- Reasons for actions or personal viewpoints
- Empathy, capacity for tolerance (or lack of these)

#### Enjoyment, inspiration and creativity

- Having fun
- Being surprised
- Innovative thoughts, actions or things
- Creativity
- Exploration, experimentation and making
- Being inspired

#### Action, behaviour, progression

- What people do
- What people intend to do (intention to act)
- What people have done
- A change in the way that people manage their lives including work, study, family and community contexts
- Actions (observed or reported)
- Change in behaviour
- Progression – towards further learning, developing new skills – is the result of a purposive action which leads to change

**5.**

# **GETTING STARTED**

**Planning your evaluation and  
using the evaluation checklist**



# 5. GETTING STARTED

## Planning your evaluation and using the evaluation checklist

It's very important to ensure that any evaluation being carried out is planned and implemented using a framework that covers the essentials (what is meant by the essentials is discussed below). This will ensure that the evaluation process and results are robust and that different studies can be compared to one another, as they are of the same high quality.

You may find that you are encouraged to use a certain framework when planning your evaluation (the Logic Model approach is discussed below, and the ILFA framework is covered in [Feature 2](#)). Logic Models can seem confusing because there is no one 'type'; there are variations on a common theme. The best advice is to be pragmatic – use a framework if it helps you but if your project components don't easily fit within the type of framework you have been asked to use, then don't force it to. Otherwise, you are likely to get frustrated and produce an evaluation plan that doesn't really work for you. Resources from Evaluation Support Scotland on creating an evaluation plan, linked to the information and advice given here, include a [video](#)<sup>1</sup> and a [support guide](#)<sup>2</sup>

The essentials that should be in your evaluation plan are covered by the [checklist](#) and in the [pull out planning tool](#). At the very least, in devising a good evaluation design you should:

- Establish the key question the evaluation is seeking to answer. Think about the outcomes and outputs and importantly *how you will measure these*.
- Discuss the project / activity with any stakeholders as they can help to shape and design the study.
- Use data collection methods which are feasible in the time available and which will provide robust and meaningful results.
- Agree and be clear about who is taking responsibility for which part of the evaluation, e.g. participant recruitment, data collection, analysis, reporting, monitoring, and what the timescale is for each stage.

- Feed back your results in an appropriate way (different audiences can call for different styles) and make sure you fulfil any reporting requirements (e.g. progress reports, evaluation reports).

**Your evaluation can be broken down to sit alongside three broad stages of the project or activity you are evaluating:**

- 1** What you need to do before the project, such as plan your evaluation or carry out any front end evaluation, if required.
- 2** What you need to do during the project, such as record activities, gather evidence, monitor evaluation methods and tweak if necessary. You can carry out formative evaluation at this stage too, if needed.
- 3** Lastly, there's tasks for after or at the end of the project / activity. These would include asking questions of your evidence, evaluating objectives, outcomes and impact; essentially carrying out a summative evaluation.

If you are now at Stage 1, then remember that **the more time committed to planning your evaluation, the more effective it is likely to be**. That is why the [checklist](#) is designed to help you think about all the important issues before you start your evaluation. Each item is referenced against sections in this toolkit where you can go for more detailed help. **Also think carefully about how you are going to resource your evaluation**. Hopefully you have a realistic budget set aside already, but if you find that your evaluation plans are more ambitious than your funds allow, it's better to focus on one or two key areas than to spread your resources too thinly and find that your results don't really tell you anything useful. Some questions to think about in devising your budget are set out in [Section 2](#) and if you are going to commission an external evaluation consultant, there is more information in this section.

# THE CHECKLIST

## What to think about before starting the project

## Find out more

### Rationale and context for evaluation

- What is the project / activity you are evaluating? Why are you carrying out the evaluation – what is its purpose? [Section 3](#)
- What type of evaluation is it (front-end, formative and / or summative)? If your evaluation will cover more than one of these, how will your stages of evaluation link to one another? [Section 2](#)
- Why will the findings be of interest and who will they be of interest to? [Section 8](#)
- Set your baselines – establish what quantitative and qualitative information you have currently that relates to your project. [Section 4](#)
- Decide how you will plan your evaluation and measure any outcome / impacts. [Feature 2](#)

### Aims, objectives, outcomes, impacts and outputs

## [Section 4](#)

- What are the aims and objectives of this activity / project?
- What are the proposed outputs of this activity / project?
- What are the proposed outcomes and impacts of this activity / project?

### In-house or outsourced evaluation

- Do you have the staff and time to deliver the evaluation in-house?
- If you need to commission an external consultant to do the evaluation for you, you will need to have answered most, if not all, the questions in the two boxes above if you are to write an evaluation brief. Thinking about answers to questions in the three boxes below will also help you to gauge whether the responses to your brief are realistic and appropriate to your needs.
- What needs to go in an evaluation brief for an external consultant?

## [This section, below](#)

### Methods

- What are the proposed evaluation methods and how will these capture information that can measure your aims, objectives, outputs and outcomes? [Section 6](#)
- What baseline information do you have or need in order to demonstrate the progression or 'distance travelled' by your project or activity? If you don't have this already, how could you collect it at the start of the activity? [Section 2 & Section 4](#)

### Participants

- Who are your intended participants / target groups and how many people do you need to recruit or involve? [Section 4 & Section 9](#)
- What are your proposed sampling methods? [Section 4](#)
- Are your methods accessible to your intended audience? [Section 9](#)
- Do you need to consider any ethical issues? (e.g. are you working with vulnerable groups, do you need informed consent?) [Section 9](#)
- How will you collect feedback from people delivering the service to your visitors? [Section 6](#)

### Recording data

- What methods do you propose to use to record the data gathered? [Section 6](#)
- Will these allow you to interrogate the data easily? [Section 7](#)
- Will the storage of data comply with GDPR and the Data Protection Act 2018? [Section 9](#)



“

**One of the great mistakes is to judge policies and programs by their intentions rather than their results.**”

Milton Friedman

### Using a Logic Model Approach

Logic Models have become increasingly popular with funders and government in recent years. They are simply a visual way of showing how the resources you put in relate to the outputs and outcomes you expect to achieve. In this way, they can help you to summarise graphically (and understand conceptually) the different elements that are needed or desirable in a project to achieve your overall aim. If you do an internet search, you will find many templates that you can use to create your own Logic Model, these can vary by how they name the different components of your project (sometimes *activities* – the things you do e.g. an exhibition, a talk - are separated from *outputs*, sometimes they fall under the heading of *outputs*) and whether they organise the structure vertically, horizontally or otherwise.

The *Theory of Change* (sometimes abbreviated to *TOC*) is often confused with Logic Models. It is very similar in that it considers the relationship between inputs, outputs and outcomes, but is often more complex in that it looks at the causes and effects of these elements working in combination. For example, if I am delivering a series of related talks and I would like the audience to have increased skills and understanding as a result, what else do I need to expect to make this possible? The answer might be: attendance at all five of the sessions. Theory of Change considers the *how* and *why* of the relationship between your inputs, outputs and outcomes, it takes into account your assumptions and any external factors that may contribute to or hinder the benefit you are aiming to achieve. This means that it can be more time consuming, and require greater reflection, to develop a plan based on TOC. Often when people talk about Logic Models or ask you to use them to plan your evaluation, what they really want is for you to incorporate an element of the Theory of Change (the how and why).

The important thing to remember is that Logic Models are a way for you to plan your evaluation, they are models and show intent. In reality, your project or activity might not turn out like this, so it's important to capture the unforeseen things taking place and the unexpected outcomes, and to try to explain their occurrence. The other point to make with Logic Models is that they can be used to help you focus more on:

- the outcomes: splitting them down in to short- and long -term, sometimes medium-term as well, i.e. what difference have we made as a result of this project?
- the process, or *implementation* of the project: this places emphasis on the inputs and outputs, i.e. what are we doing successfully to achieve these outcomes?



### Commissioning someone to do your evaluation

If you are planning to appoint an external person or agency to plan and deliver your evaluation, excellent guidance already exists on working with freelancers in [general](#)<sup>3</sup> and on commissioning [evaluators](#)<sup>4</sup>. These are well worth a read before you consider the following points.

#### What to include in the brief:

- The context – what is the project or activity about? What are its aims and objectives?
- The purpose of the evaluation and what key questions you would like it to answer
- The scope of the evaluation – are you looking for someone to devise a plan, oversee or deliver the data collection, analyse the information and report the results, or are they required for just one part of this process?
- The kind of person / people you are looking for – what specific skills or experience are important?
- The budget for this piece of work (or the price range that you would like responses to be costed within). Will this include all expenses and VAT?
- What information you already hold / collect and which could be made available for the evaluation
- Any particular approach you may be keen on, e.g. Theory of Change, Logic Model, and what format the report should be in. Who is the audience for the evaluation and what do you hope to do with the results?
- What needs to be in the response and how you will judge them (more on this below)
- Your schedule – to deliver the evaluation and for the commissioning process itself. It's a good idea to include the interview date (if you plan to interview candidates)
- Deadline for responding and any limits on the size (number of pages) of the response. Where to send the response to
- Who is the point of contact for any questions.

#### Where to circulate the brief

- On your own website and via your social media accounts
- Via your Regional Museum Development [team](#)<sup>5</sup> (on their website, social media or newsletters)
- On the Leicester Museums Jobs [Desk](#)<sup>6</sup>
- On the Visitor Studies [website](#)<sup>7</sup>
- Via newsletters or mailing lists of any local arts, heritage or museum groups or forums.

#### How to judge responses

- Ideally using both a written response and by interviewing the candidates
- Using the criteria you set in the brief and the weighting for each, e.g. their proposed approach, understanding of brief, relevant skills and experience, value for money
- At interview, use this opportunity to tease out further information, to clarify anything in the brief that was not clear or seemed particularly interesting and to assess whether they would be a good fit with your organisation.



## 3

Epping Forest &amp; District Museum ©David Kirkham

## OTHER TOOLS AND FRAMEWORKS

### EVALUATING WELLBEING

The idea that museums can contribute positively to wellbeing has been gaining significant ground in recent years, for good reason. Put simply, wellbeing is about how happy an individual or group of people feel. This is usually affected by a range of factors and relates to their quality of physical and mental health and affinity with their communities. There is a comprehensive introduction to the topic by the [National Lottery Heritage Fund](#)<sup>1</sup> which signposts you to other resources.

There is potential for all people who interact with museums to feel a benefit to their wellbeing, but it is particularly relevant for certain audiences, often more vulnerable audiences who can feel isolated day-to-day, such as the elderly living in residential care homes, people living with a physical or mental illness or a learning disability.

How you measure the impact of your activities on a person's wellbeing can seem daunting but there are many tried and tested methods available, for instance:

- Consider how you might use the GLO and GSO framework [Feature 2](#) to capture evidence, for example, of an increase in confidence, a sense of enjoyment, wanting to engage more with others, to make new friends, a greater sense of pride in the local area. These things help contribute to an improved sense of community and wellbeing. There are other learning outcomes mapped against the social outcomes that also demonstrate this.
- University College London's [Museum Wellbeing Measures Toolkit](#)<sup>2</sup> which is designed for use with older and younger adults.
- The What Works Centre for Wellbeing has produced a helpful [guide](#)<sup>3</sup> that explains wellbeing, how to measure it, a set of four recommended scaled questions based on the ONS Annual Population Survey, tips on creating your own questions (including open questions) and a survey builder with explanations on analysis of the data.

### THE IMPACT & INSIGHT TOOLKIT

This Arts Council England resource, delivered by Culture Counts, is available to ACE funded organisations to help them evaluate the difference they are making for their [stakeholders](#)<sup>4</sup>.

This has an element of self-evaluation as well as asking peers and visitors for their feedback, via survey, to performances, exhibitions and projects using a common set of metrics so that there is consistency of approach and the phrasing of questions across organisations. There may be an opportunity in time for non-ACE funded organisations to buy into the toolkit. 'Dimensions' are the standard question type and each dimension is standardised, meaning they can be benchmarked over time or against other organisations. Questions can also be customised and each survey can be configured for your organisation (e.g. by uploading a logo). The digital surveys can be built using the online toolkit and then delivered online, via interview or on devices housed in situ. Results are automatically collated and summarised by survey and type of respondent. In time, it is hoped that the body of data collected through this platform is compared and benchmarked by organisations so that they have a deeper understanding of the value of cultural experiences.

### PARTICIPATORY EVALUATION

Participatory evaluation, as its name suggests, involves participants from the project or activity in shaping the evaluation process as well. Ideally this should happen throughout delivery, i.e. evaluation design, data collection/analysis and reporting. It is strongly linked to co-production [Section 4](#) and is an approach that is being used increasingly with young people. Participatory evaluation is a model that is likely to work better where your involvement with stakeholders is longer term, since there is quite an investment in this method. The table here summarises its strengths and challenges.

#### Strengths

- Can give you a deeper insight into the effects of a project
- Will provide an insider's perspective and a better understanding of process (why something does / doesn't work)
- Often empowering for stakeholders
- Can provide more meaningful level of engagement between audiences and organisation (collaborative)
- Shows that you reflect inclusive practice
- Recommendations arising from the evaluation can be more realistic, relevant and more likely to be addressed

#### Challenges

- Time-consuming. Don't underestimate the time it takes to build a relationship – trust is important for this kind of situation to work
- Training may be necessary (e.g. in delivering robust evaluation)
- No one person is in charge, therefore skilled facilitation is key to guide stakeholders through discussion and decision making. This is also important if there are any points of conflict.

If you are interested in participatory evaluation, then you can read more about it at [Better Evaluation](#)<sup>5</sup> and there is also a free resource that sets out three participatory evaluation techniques that you could use in a community or partnership [setting](#)<sup>6</sup>.

**6.**

**WHAT DATA  
COLLECTION  
METHODS ARE  
OUT THERE?**

# 6.

## WHAT DATA COLLECTION METHODS ARE OUT THERE?

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### 6.1 INTRODUCTION

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This section focuses mostly on what ways you can collect information to understand the behaviour and opinions of your stakeholders – your audiences, partners and colleagues. It is less concerned with those data collection methods that are about numbers, e.g. people counters at the entrances to rooms or till systems that can provide a breakdown of audiences by ticket types.

#### **Which method should I use?**

Evaluation does not need to rely solely on the more typical methods such as questionnaires and interviews. There are in fact a wide range of methods that can be used, depending on your resources and the audience you wish to survey. It is key to consider both your resources and your audience(s) as these factors will shape your choice of survey method. For example, a written questionnaire will not work well with young children and, although it might be more suited to use with adult users, if you do not have the time or resources to analyse the results, then it will not be a good option in that context either. In many situations, however, questionnaires still do prove to be a useful tool for gathering user feedback.

#### **How many methods should I use?**

Particularly if you are running a large project (as opposed to collecting feedback for a one-off activity) it is often a good idea to use more than one evaluation method to survey your users. This means that your methods are more accessible to a range of people (i.e. what might suit one person may not suit another), but can also provide you with more robust results because you are able to overcome data that may be unrepresentative or unreliable. Whether or not you use more than one method will be very much dependent on your resources and on what activity or service you wish to gather feedback on. It would be realistic to use just one method for a one-hour outreach session with young children, but a 12-week exhibition for example, should really seek to use two to three or more methods.

Whichever method you use, remember that you should be realistic at the start about how much time will be needed for the analysis. Quality of feedback (i.e. from a few well-thought out questions) is more important than quantity (i.e. from lots of poorly written questions).





### What methods are available?

There are many types of data collection that are suited to use in museums. Although the list below is a long one, it is not exhaustive:

- Questionnaires (both on paper and online)
- Interviews
- Focus groups
- Social Media
- Apps
- Comments books / forms
- Comments walls
- Verbal comments (recorded by staff)
- Post codes (sometimes collected at reception)
- Take-up of offers (e.g. vouchers) and repeat bookings
- Enquiries by members of the public – nature of these and time spent on response are recorded
- E-mails and letters of thanks or complaint
- Media coverage
- Presentation of artwork of user group
- Visitor Observation
- Photography and video of outputs (e.g. exhibitions, performances)
- Mystery shopping
- (Staff) facilitated visits – where staff attend alongside a group of visitors to see it from their perspective
- Staff meetings (debrief)
- Mentoring and peer review
- Diaries, Blogs and Vlogs (these tend to work well in apprenticeship / skills building roles or in projects piloting or trialling new ways of working)

Some are more commonly used by museums than others, and some are more recent additions as technology changes the way that we live (e.g. social media). The point of including such a long list is to encourage you to think laterally about the ways in which you might collect information from your stakeholders, that doesn't simply rely on just using a written questionnaire. They come with their own advantages and disadvantages (some of these are summarised in the [table overleaf](#)). Two other points are worth bearing in mind at this point:

1. Evaluation can be fun and can be built into the activities or services you deliver, so that the two become seamless, rather than evaluation becoming an 'add-on' at the end. For example, if you are working with a group of children and the day's activities are based around artwork inspired by things they have seen in the gallery, then asking them to fill in a questionnaire at the end of the day might detract from this experience. Instead, you could ask them to choose an object in the gallery that matches their experience in the museum – 'Describe how the object represents your experience today'. A person would be on hand to write down what they said. Or they could draw a response and annotate it with their thoughts.
2. Embed reflective practice in your museum and get everyone involved with the conversations you have with audiences. Make sure there is a way to record and talk about these conversations within your organisation, at meetings and debriefs. For example, your stewards and guides who talk with visitors on a daily basis could record interesting and pertinent conversations in a stewards day book that is shared at monthly meetings and where any issues are discussed and resolved.



## THE PROS AND CONS OF DIFFERENT DATA COLLECTION METHODS

Method	Strengths	Weaknesses
<b>Comments books</b>	<ul style="list-style-type: none"> <li>Simple and cheap</li> <li>Quick and easy to complete</li> <li>User free to express opinion</li> </ul>	<ul style="list-style-type: none"> <li>Self-selecting, you will not achieve full range of views</li> <li>Limited information obtained</li> <li>Meaning not always clear</li> </ul>
<b>Interviews</b>	<ul style="list-style-type: none"> <li>Can provide in-depth views</li> <li>Audience sampling is possible (as opposed to self-selecting methods)</li> </ul>	<ul style="list-style-type: none"> <li>Can be time-consuming to deliver</li> <li>Interviewer needs to be skilled / trained</li> <li>Can yield a lot of data that needs processing</li> <li>Intrusive to visitor experience</li> </ul>
<b>Focus groups</b>	<ul style="list-style-type: none"> <li>Obtains in-depth views of specific groups</li> <li>Group interaction may stimulate discussion and generate new ideas</li> </ul>	<ul style="list-style-type: none"> <li>Difficulty recruiting an appropriate sample</li> <li>Skilled facilitator needed</li> <li>Analysis is time-consuming</li> <li>Not everyone is comfortable in a group</li> </ul>
<b>Questionnaires</b>	<ul style="list-style-type: none"> <li>Simple and cheap</li> <li>Obtain answers to specific questions</li> <li>Normally data is fairly easily analysed</li> </ul>	<ul style="list-style-type: none"> <li>In most situations, they are self-selecting (so do not provide a full range of views)</li> <li>Can sometimes limit people's feedback</li> </ul>
<b>Post codes</b>	<ul style="list-style-type: none"> <li>Relatively easy to collect and process</li> <li>Often possible to collect of most of audience group if done on reception</li> </ul>	<ul style="list-style-type: none"> <li>Have to be stored, processed etc according to data protection legislation</li> <li>Can be time consuming to process</li> <li>Provide limited information (not audience opinion)</li> </ul>
<b>Visitor observation</b>	<ul style="list-style-type: none"> <li>Records audience interaction as it happens, rather than relying on audience recall</li> <li>Can apply sampling methods</li> <li>Can achieve in-depth information or answers to specific questions</li> </ul>	<ul style="list-style-type: none"> <li>Observation requires skill and careful planning</li> <li>Can yield a lot of data</li> <li>Need to make audiences aware of observation so can be intrusive, can affect visitor behaviour</li> </ul>
<b>Diaries*</b>	<ul style="list-style-type: none"> <li>Suitable for collecting in-depth and / or longitudinal data</li> <li>Provides insight into processes, developments</li> </ul>	<ul style="list-style-type: none"> <li>Can be time-consuming to complete</li> <li>Confidentiality issues</li> </ul>
<b>Visual methods**</b>	<ul style="list-style-type: none"> <li>Suitable where low literacy is an issue</li> <li>Likely to engage certain groups of people e.g. children</li> </ul>	<ul style="list-style-type: none"> <li>Can be hard to analyse</li> <li>Does not usually provide a comprehensive view of a person's experience</li> </ul>
<b>Graffiti walls</b>	<ul style="list-style-type: none"> <li>Simple and cheap</li> <li>Displayed comments likely to engage other users in both graffiti wall and other displays</li> </ul>	<ul style="list-style-type: none"> <li>Only some people will complete so does not provide a full range of views</li> <li>A limited range of information is collected</li> </ul>
<b>Mobile responses</b>	<ul style="list-style-type: none"> <li>Fun</li> <li>Easy to analyse using a quick count</li> </ul>	<ul style="list-style-type: none"> <li>Simple responses to simple questions</li> <li>Some people may be influenced by others</li> <li>Not suitable for some groups</li> </ul>
<b>Social media</b>	<ul style="list-style-type: none"> <li>Free to use</li> <li>Provides digital access, immediate responses</li> <li>Fast / immediate</li> <li>Visual – popular</li> <li>International reach</li> <li>Broader means of expression / unfiltered</li> <li>Can assist to build relationships</li> </ul>	<ul style="list-style-type: none"> <li>Needs moderating (whose responsibility?)</li> <li>Can result in negative posts (trolls)</li> <li>Can yield too much information</li> </ul>

\*Could include online blog or staff day book    \*\*Imagery, presentations, art work, photographs, film

Appropriate (or not) to these groups	When most suitable / other key considerations
<ul style="list-style-type: none"> <li>People who are motivated to give an opinion (i.e. often those with strong views)</li> <li>Literate people</li> </ul>	<ul style="list-style-type: none"> <li>Gives a general feel for how exhibition is perceived</li> <li>Identifies specific issues, e.g. problem lighting</li> </ul>
<ul style="list-style-type: none"> <li>May be difficult with children, less articulate groups</li> <li>Can be threatening to some groups</li> <li>Those with time to participate easily</li> </ul>	<ul style="list-style-type: none"> <li>Getting in-depth views from a good cross section of your population, e.g. front-end research, community 'consultation'</li> </ul>
<ul style="list-style-type: none"> <li>Articulate individuals</li> <li>Those with a clear stake or interest in the research</li> <li>Group situations are difficult for some people (can be a tendency for certain individuals to dominate discussion)</li> </ul>	<ul style="list-style-type: none"> <li>Getting in-depth views of specific groups, e.g. front-end research, community 'consultation'</li> </ul>
<ul style="list-style-type: none"> <li>Literate people</li> <li>People who are motivated to give an opinion</li> <li>Younger children, non-literate can be excluded</li> </ul>	<ul style="list-style-type: none"> <li>Obtaining responses to focused research questions</li> </ul>
<ul style="list-style-type: none"> <li>Domestic audiences</li> </ul>	<ul style="list-style-type: none"> <li>Providing an over-view of who is using a venue / service and who is not (by location)</li> <li>Service planning and marketing</li> <li>Can be used in conjunction with other research to articulate economic impact</li> </ul>
<ul style="list-style-type: none"> <li>Most people</li> </ul>	<ul style="list-style-type: none"> <li>Often for front-end and formative evaluation</li> </ul>
<ul style="list-style-type: none"> <li>Literate, reflective, motivated people</li> <li>Literate, reflective, motivated people</li> </ul>	<ul style="list-style-type: none"> <li>Understanding behavioural changes</li> <li>Understanding processes</li> <li>Sharing experiences (blog, day book)</li> </ul>
<ul style="list-style-type: none"> <li>Those who are averse to other forms of data collection, e.g. writing, speaking</li> </ul>	<ul style="list-style-type: none"> <li>Obtaining information from groups that do not engage in other methods, e.g. children, young people</li> <li>To cater for different learning styles</li> </ul>
<ul style="list-style-type: none"> <li>People who are motivated to participate</li> </ul>	<ul style="list-style-type: none"> <li>To get a general feel for how an exhibition / activity is perceived</li> <li>Useful for identity specific issues</li> </ul>
<ul style="list-style-type: none"> <li>The more mobile, especially energetic children</li> </ul>	<ul style="list-style-type: none"> <li>For getting responses to particular questions</li> <li>To get the views of children</li> <li>To cater for different learning styles</li> </ul>
<ul style="list-style-type: none"> <li>Appealing to younger audiences</li> </ul>	<ul style="list-style-type: none"> <li>Upkeep of content can be a big commitment</li> </ul>

## 6.2 THE GOLDEN RULES OF A GOOD QUESTION

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“

**The most serious mistakes are not being made as a result of wrong answers. The true dangerous thing is asking the wrong question. ”**

Peter Drucker

One of the most important elements that will have a bearing on the quality of your feedback is the quality of your question. Ambiguous, poorly structured questions are likely to yield equally ambiguous and poor responses. So there are some basic principles that need to be followed in phrasing a 'good' question.

### General advice

- Use simple language:
  - Short sentences are best (containing 15 to 20 words maximum)
  - Avoid museum-specific jargon (e.g. 'interpreting the collections') or abbreviations, unless these are properly explained
  - Avoid 'leading' questions if you can (suggestive of a wrong / right answer). For example: Would you say that you are extremely satisfied with your museum visit today?
  - Try not to leave out articles (e.g. 'a', 'the') and pronouns (e.g. 'it', 'them'). This usually happens when there is a lack of space but including them can actually help the reader arrive at the meaning more easily. It is better to omit a question if you have run out of space, than to squeeze it in and lose clarity of expression or presentation.
- Make sure your questions are not ambiguous, e.g. 'In the last week ...' – depending on the person, this could mean the previous seven days or the previous number of days to the last Monday.



### DID YOU KNOW?

#### Using Audience Finder to understand your audiences

The Audience Agency offer Audience Finder, funded by Arts Council England, a free national audience data and development [tool](#)<sup>1</sup>. This is aimed at cultural organisations so that they can understand, compare and use information based on their audience insight. Audience Finder brings together data on all UK households with data from over 800 cultural organisations. One of the features offered by Audience Finder is a questionnaire with core questions covering topics such as motivation for visiting, rating for quality / value / experience, likelihood to recommend, demographic information etc. Five additional questions can be added from the premium list free of charge.

- Ask one question at a time (e.g. 'How would you rate your experience today?' rather than 'How would you rate your experience and enjoyment today?').
- Test out your questions on colleagues, family or friends before using the question with 'real' participants to check that the questions are understood in the way that they were intended.
- If you are asking a group of questions, make sure they are structured from the general to the more specific, and group questions if they relate to one another
- If you are going to use pre-defined categories where you need standardised answers (e.g. age categories, yes / no / don't know) make sure these are well formulated and tested first.
- It seems quite obvious but ... don't ask any questions that you do not need the answers to! For example, you might decide to save time by using a survey written by another museum. However, just because that museum has asked for people's postcodes on the survey, there is no reason to include this question on your survey if you are going to do nothing with this data. If you are going to 'borrow' questionnaires devised by others:
  - Make sure in the first instance that their questionnaire has followed the guidelines stated here.
  - Be prepared to spend time tweaking and improving it to suit your own needs.

### Attitudinal questions

- If you want to ask attitudinal questions, you can use what is commonly referred to as 'Likert'-style questions. This will measure graduated responses to a statement. For example, for the statement 'I enjoyed my visit to the museum today', you might have the response choices: (1) Strongly disagree, (2) Disagree, (3) Neither agree nor disagree, (4) Agree, (5) Strongly agree.
- You can use an even or odd number of responses. Using an even number by removing the middle, or neutral, category ('Neither agree nor disagree') constitutes a 'forced choice method'. This has the advantage of encouraging respondents to engage with the statement where they may be tempted to go for the middle category as the easy, non-committal option. It may be, however, that the respondents are genuinely neutral about the statement and are being forced to express an opinion where they have none. Whether to use odd or even scales is a topic of debate amongst academics and there is no clear answer, so either approach is acceptable. You should ensure, however, that you are consistent with the number and definition of categories, i.e. you should stick to four, five or six- point scales throughout the survey.
- When using a Likert-style question, it is generally recommended that you use a five or six-point scale. Using a smaller number can mean that your results are less valid (because there is less choice) whereas using a larger number may put people off completing your survey.
- Providing a 'Don't know' or 'Can't remember' category is advisable when asking some questions, such as those that ask people to remember something, or to indicate their knowledge or understanding of a topic.

### When collecting rich narrative

- Ask an open-ended question if you are looking for an open-ended answer
- Consider starting with what or how or use the TED approach (Tell me, Explain to me, Describe to me)
- Ask about specific experiences rather than intentions or possibilities (e.g. Think back or Reflect)



- Think about how you might ask a question in a variety of ways and test them out with colleagues, friends or family. Which one works best? For example: What did you learn today? What do you know now that you didn't know before today? What new things did you discover today?
- Always have a 'no opinion' option for questions on attitude / feelings.

## 6.3 QUESTIONNAIRES

### About questionnaires

Questionnaires are one of the most commonly used evaluation methods. These can be completed by the visitors themselves (self-completion) or facilitated (the museum provides an interviewer to ask the questions and record the answers). They are particularly suitable when you would like to get a response from a large number of people in a relatively short time (which is harder with the facilitated option), or if you would like to have a rolling survey (i.e. one that is ongoing or repeated at regular intervals during the year). They can ask for information about people's knowledge, awareness, satisfaction, expectations, behaviour, preferences and beliefs, as well as demographic data (e.g. respondents' age, ethnicity, gender, etc).

It is not always necessary to collect demographic information, but it can be useful, particularly with longer surveys where you would like to analyse the results to see if certain groups of people are more likely to respond in a certain way (e.g. 'younger people (aged under 25) tended to agree more strongly that they enjoyed the outreach session than older people (aged over 55)').

Don't be fooled into thinking that a questionnaire left in a space for people to complete on their own will provide you with a representative picture of the demographics or opinions of your user group. In these instances, the response to the survey is entirely self-selecting (i.e. reliant on the desire of individuals to participate). It tends to be highly motivated people who do participate, often having had polarised experiences ('I had a fantastic time and I want to tell you how wonderful your galleries are' versus 'I had an awful experience and I want to tell you how rude your staff were') or people with the time and inclination to write their response (for example, a mother with three young children in tow is unlikely to be able to do this).

### Top tips for writing and using questionnaires

#### Basic formatting and content

- Questionnaires can be designed to be relatively short, asking a minimum of questions that would fit on a postcard, or they can ask more detailed questions that warrant more space. Ideally, questionnaires should fit on one side of A4 or a double side of A5.
- In addition to the actual questions you wish to ask, a good questionnaire should also contain:
  - An introduction explaining the reason for the questionnaire and what will happen with the results (e.g. 'We welcome your feedback on this exhibition which will help us to make continual improvements to our future exhibition programme. Any personal information you provide will be stored and processed according to the Data Protection Act 2018\*').
  - Instructions that tell respondents what to do with the questionnaire when they have completed it – do they post it in the box provided (where is the box situated?), do they hand it in to a

\*If you are not collecting personal information then you can omit the last sentence.





member of staff (where and how?) or do they post it back to you (what is your address, is a pre-paid envelope provided?). Also indicate how a respondent is to answer a question ('Tick or put a cross in the relevant box', 'Write your answer in here:').

- A note thanking the person at the end for completing the questionnaire (and perhaps indicating how valuable their feedback is to you).

- Use upper case for whole words sparingly. If you want to emphasise importance use bold text.
- If you have a double-sided questionnaire, ask people to turn over at the bottom of the first page to make sure that questionnaires are fully completed.
- Number your questions and use Arabic numerals (1, 2, 3) rather than Roman numerals (i, ii, iii).
- Use text that can be easily read – Arial in point size 12 is best.
- Structure your questionnaire so that it asks more general questions first and moves on to specific questions further on.

### Phrasing questions

- Employ a mix of closed and open questions. For example, asking if someone enjoyed their visit (eliciting a 'yes / no' answer) can be usefully supplemented by a question asking them to explain their answer (that way you know why they did or did not enjoy their visit). Of course, you can be clever and use just one question to ask this: 'What, if anything, did you enjoy about your visit?'
- If you include demographic questions and are using pre-defined response categories make sure these fit with categories that are already widely used (such as those by the Office for National Statistics or local government offices). This means that you can compare your respondents' characteristics to datasets that already exist.
- Questionnaires can seem more approachable if demographic questions are left to the end of the survey.
- Be consistent throughout the questionnaire with your method of selecting a pre-defined category ('Tick' or 'Cross the relevant box' or 'Circle the relevant answer'). Don't mix and match as this will cause confusion.

### Resource implications

- Never underestimate the amount of time it will take to analyse the results. The longer the questionnaire and the more respondents you have, the longer it will take you to make sense of the data. This is another reason for being very focused about the key questions for which you would like a response.

### Other considerations

- If you are collecting personal information on the questionnaire (see [Section 9](#) if you aren't sure what constitutes 'personal information'), the questionnaire and any databases containing the questionnaire data must be stored and processed according to the Data Protection Act (2018). This means, for example, that you cannot leave questionnaires containing personal information out in galleries for public view.

Trial your questionnaire before you use it properly. This can be as simple as asking a few colleagues, family members or friends to read it through and have a go at completing it. Questions that seem straightforward to you might not to others. Even a quick trial can save you from results that are unusable later on because respondents did not understand questions, leaving them blank or reading their meaning in a way that you did not intend.





## DID YOU KNOW?

### Using online surveys to understand your audiences

Recent years have seen a huge growth in online surveys, in terms of the number of companies offering this service and the range of functionality that is on offer. Even some social media platforms provide you with the ability to carry out quick polls. This toolkit does not endorse you spending money with any particular online survey company and does not try to summarise all the available providers and their services – the industry is fast paced and any summary would soon be out of date. Listed below are some points for you to consider when making a choice about which provider to use, and what the advantages are of online surveys.

#### Advantages of using online surveys

- Often offer a professional appearance in terms of design and format
- Can be easy to disseminate to a wide audience, including non-users
- Low resource costs – no printing or designing needed
- Often intuitive to create (depending on the company)
- Can usually be embedded or featured on your website, social media, in e-mails
- The same survey can be hosted across different devices, e.g. within your museum on a tablet and on your users' devices, such as mobile phones.

Many online survey companies offer membership based on a sliding scale of costs, often there is a basic or a free option which can provide all you need.

#### Things to weigh up when comparing the free option offered by different providers include:

- How many surveys you can have in a set period (e.g. per month)
- How many questions and responses are allowed per survey
- Whether you can export data or not, and if so, in what format. If you anticipate having a large number of responses, and / or lots of numerical data, then exporting it as a spreadsheet, rather than as a PDF, is more useful.
- Whether logic functions are included (i.e. routing how people move through a survey depending on their answers, e.g. if you asked people 'Have you visited this site before', those who answered 'no' would not be asked the follow-up question 'How recently did you visit?')
- Whether you can upload a logo or images to use in the survey
- How much customisation of the design is possible - colour, font etc.
- What question / answer types are possible (e.g. open ended, sliding scales, drop down boxes, grid-layout)
- How you are able to share the survey, as a link, from within the survey site itself to a list of contacts (and whether you can monitor the completion rate by individuals), embedded in your website, on a device in your venue (where it is on a loop, once finished it opens a blank survey)
- If you are entitled to technical support without a paid subscription
- Where the data collected through the survey will be stored. Will this be on a server in the UK where it should meet GDPR / Data Protection legislation? (check it does), or overseas? (e.g. in the US) where it may not meet these requirements. If you are not collecting any personal information, then this is not likely to be an issue, but be clear about what constitutes personal data before you disregard this point [Section 9](#). Make sure in the settings section of the online site, when creating your survey, that you untick any option to collect the IP addresses of your respondents. These can potentially count as personal data.

## 6.4

# INTERVIEWS

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### About interviews

Interviews can be done in a variety of ways; formally or informally, fully-structured or semi-structured. They can be face-to-face or done over the phone. Responses both verbal and sometimes non-verbal (e.g. body language cues in face-to-face scenarios) need to be recorded which may need special equipment and / or expertise.

### Top tips for planning and running interviews

#### Planning the interview

- Decide how you will identify and choose your participants. Are you seeking views from non-users and / or a specific type of user? Will you need a sampling strategy [Section 4](#)? Will you need to approach people in advance to arrange their participation or will you approach people 'cold' at the time of the interview?
- Decide on your list of questions. Remember that interviews offer you the chance to gather a richer narrative of feedback from participants and so your questions should reflect this; take the opportunity to ask a few more open questions than would be possible with a questionnaire.
- Only ask personal (demographic) questions if you absolutely need to do so.
- Decide how you will record the interview – by taking notes or making an audio recording

#### During the interview

- Make sure the interview isn't any longer than necessary. An exit survey or gallery interview should last no more than 15 minutes maximum, but an ideal length would be 5-10 minutes.
- Be upfront and honest with your participant at the start of the interview (or when recruiting participants) about the length of time it will take and how their comments will be used.
- If your interview is semi-structured, then it is appropriate to probe the participants for further information if you feel that their first answer doesn't give you the depth of information you were hoping for.
- Leave any personal questions to the end of the interview, when a rapport has been built up and the participant is likely to feel more comfortable about providing you with this information. Try to use pre-defined categories for as many personal questions as possible (e.g. age, ethnicity) to avoid causing any embarrassment. Don't try to cajole participants into providing any personal information they are not comfortable giving!
- Hold the interview in an appropriate place, away from any disruptions but not in an isolated place. Ensure that you have colleagues nearby, for the safety of both yourself and the interviewee.

#### Resource implications

Following the interview, you will need to write up any notes or transcripts promptly to ensure that information is not forgotten. Although this is not as time consuming as with focus groups, it can still take more time than using self-completion questionnaires, particularly if you have used a lot of open-ended questions. Make sure that the necessary resources to do this are considered in the planning stages.



### Other considerations

- If you are collecting personal information during the interview (see [Section 9](#) if you aren't sure what constitutes 'personal information'), the notes / transcripts and any databases containing this information must be stored and processed according to the Data Protection Act (2018).
- Interviews should start off with the interviewer explaining the purpose of the discussion and the rights of the participants under any data protection legislation or according to best practice guidance (e.g. the right to withdraw from the research at a later date). Participants should be provided with an information sheet and two copies of a consent form. Both copies of the latter should be signed and one returned to the person carrying out the interview.

## 6.5 FOCUS GROUPS

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### About focus groups

Focus groups involve discussion among a group of people on a subject that is the focus of conversation. They are usually facilitated discussions (i.e. the convener will have a set of questions for the group to explore). Focus groups are good at providing you with qualitative information and, when facilitated well, will allow you to tease out a greater depth of information about people's attitudes, experiences and beliefs on your subject of focus. For example, if participants make certain statements, you can follow these up with a series of probing questions that ask them to explain and qualify their opinions in a way that would not be possible with a self-completion questionnaire [Section 6.3](#). Focus groups are good at providing you with a rich source of narrative, expressed in your participants' own words; these quotes often provide useful 'sound bites' in reports. Focus groups are unsuitable for providing you with quantitative information because you are generally surveying a relatively small group of people whose views are not necessarily representative of the whole population. The quality of information that comes out of focus groups is reliant on the skills and experience of the facilitator(s).

### When are they useful?

Focus groups provide results that are particularly useful in the exploratory stages of a project (e.g. before developing a new gallery) or during the formative stages of a project (e.g. when testing 'mock-ups' of displays). They are suited to situations where you need to get qualitative information from participants more quickly and at lower cost than would be the case with individual interviews.

Group interaction may also stimulate ideas and opinions that would not necessarily have been revealed in a one-to-one interview. The focus group approach can also be adopted for staff meetings, where participants are asked to consider a range of questions and are encouraged to discuss their responses openly, with an independent member of staff who has no vested interest in the subject of dialogue, facilitating the discussion.

They work well when each focus group is organised so that members share something in common (e.g. they are all parents, they all have never visited the museum in question, they are all colleagues working on the same project, they are all teachers). If you try to convene a focus group with participants from very different backgrounds and with converging interests then it can be very difficult to progress discussion.



## Top tips on how to organise and run a focus group

### Organising a focus group

- Consider who you need to consult and whether or not you are hoping to recruit a specific group of people (e.g. new audiences) or a mix of people to provide you with data from a range of different groups (e.g. children, teachers, parents). Participants for focus groups tend to be selected on the basis of certain characteristics, because they have the relevant experience, interest or knowledge in the focus of discussion.
- It can be notoriously difficult to recruit people to take part in focus groups, particularly if this is the beginning of a relationship that you are building with a new audience. You should expect this stage to be quite time-consuming. [Section 4](#) offers some guidance on how to recruit participants.
- Always recruit more people than you think you will need as usually a small number of people are not able to participate at the last minute. So if you anticipate having 12 people in the group, then recruit 15 people. It is advisable to send out an e-mail / text or make a phone call to all participants shortly before the focus group to remind them of the time, date and venue.

### Running the focus group

- It is best to run a focus group with a trained moderator as they will have the necessary skills to manage and direct the discussion as appropriate, ensuring it runs smoothly. It is a good idea to have a second person who can take notes and deal with any matters while the moderator is involved with the group discussion.
- Recording the focus group is advisable, even if there is someone taking notes. Listening to the recording afterwards can reveal points that were missed in notes taken at the time and will be a useful tool if you want to make transcripts of the discussion.
- Before any discussion starts, it is a good idea to start the session with an ice-breaker which will help people to relax. You can ask everyone to contribute by introducing themselves and telling the group about where they last went on holiday, or you can ask them to talk about another innocuous subject on which everyone is likely to have something to say.
- In managing the discussion, moderators should try to ensure that individuals have an equal opportunity to contribute and that the discussion, although not completely structured, will at least be directed in a meaningful way that provides usable results.



Museum of Cambridge ©David Kirkham





- Most focus groups should have around 8–12 participants and run for around 90 minutes. They are organised through the use of a 'topic guide' which is essentially a series of notes for the moderator on the structure of the session, covering the ice-breaker, housekeeping issues (e.g. the toilet and what to do in the event of a fire) and the aims of the focus group as well as the questions to be put to the participants.
- The session can consist wholly of a discussion (aim to have no more than 12–15 questions) or a mix of activities and questions. For ideas of creative activities to incorporate into a focus group situation see [Section 6.7](#)
- Stimulus boards, showing things such as mock-ups of displays, or other examples demonstrating a concept visually, are a good way of encouraging discussion amongst the group.
- Moderators should avoid using leading questions and should allow discussion to flow freely as long as it stays within the focus of discussion and all participants are contributing. If this does not happen, then the moderator will need to bring the discussion back into focus and sensitively encourage participation from anyone who is not being included.
- It is a good idea to provide participants with refreshments and do expect to offer them a small token as reimbursement for their time and travel expenses (e.g. a voucher or small amount of money).

### Resource implications

- Following the session, the moderator / evaluator and their assistant will need to write up any notes or transcripts promptly to ensure that information is not forgotten. This can take a considerable amount of time and require skills in understanding the nuances of human behaviour and language. How to analyse qualitative information such as this is covered in [Section 7](#).

### Other considerations

- If you are collecting personal information during the focus group (see [Section 9](#) if you aren't sure what constitutes 'personal information'), the notes / transcripts and any databases containing this information must be stored and processed according to the Data Protection Act (2018).
- Focus groups should start off with the moderator explaining the purpose of the discussion and the rights of the participants under any legislation or according to best practice guidance (e.g. the right to withdraw from the research at a later date). Participants should be provided with an information sheet and two copies of a consent form. Both copies of the latter should be signed and one returned to the person conducting the focus group.





## DID YOU KNOW?

### Using social media to understand your audiences

Social Media is a powerful and exciting tool for museums to encourage and sustain a dialogue with audiences, and to broaden their audience profile. It is no surprise that the number of papers and research studies on the topic is growing fast. If you are interested in this area then many guides and papers are available for free online and a good place to start is by looking at what is available on [MuseWeb<sup>2</sup>](#) or by finding out about how Tate used one of its gallery spaces as a case study to evaluate a social media strategy and develop an evaluation methodology [case study<sup>3</sup> methodology<sup>4</sup>](#). Results from the Culture24 Action Research project to evaluate online success which includes social media is also available in a downloadable [report<sup>5</sup>](#).

Here is a basic list of metrics that you could make use of if your museum has Facebook, Twitter and Instagram accounts:

- Number of followers – an indication of audience size (and how this increases / decreases with time)
- Number of likes / tweets or retweets – a simple indication of engagement
- % of content shared by museum compared to % shared by audiences / visitors via smartphone, tablet or laptop / PC
- Plotting number of likes, followers, comments, tweets / retweets by date – do peaks coincide with specific activities or not, e.g. marketing campaign, launch event?
- The number of clicks on the link per tweet - when directing audiences to your museum web pages in a tweet. How successful is this strategy?
- Facebook and Twitter: can tell you when the majority of your audience is online = optimum time for you to post
- Tracking Instagram hashtags – the volume of photos shared, their reach, which are the most popular?
- Number of views on Instagram stories
- % of tweets that are retweets – indicator of content that people liked to share
- Measure of number of followers or retweets – indicator of spread of message
- Comments made in posts or tweets – content analysis using a coding scheme
- [Museum Analytics<sup>6</sup>](#) compiles these metrics and produces ranking lists for museums around the world.



## 6.6 OBSERVATION

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### About observation

Observing how visitors interact with exhibits, other visitors and members of staff can provide an interesting insight into the way in which they respond to and use the museum and what learning takes place in these settings. This type of observation can also be applied to other contexts, such as outreach events. The simplest observational tool is a count of the number of people entering a space, by visitor type (e.g. family group, peer group) and time of day (e.g. morning, lunchtime, afternoon) or weekday. This can reveal patterns about which spaces are more popular with which visitors and at which times. Often this information can be gleaned from ticket sales, particularly if there is different pricing for different groups and you are able to record your ticket sales by time and day of purchase. Usually therefore observation is more useful when it is a little more sophisticated.

### Top tips on how to organise and carry out an observation

#### Planning the observation

- Try to keep your observation of the visitor to a single space, as it will be easier and quicker to complete one observation.
- Design a record sheet for your observers to fill in with a plan of the gallery of interest on the reverse. Trial and tweak the record sheet several times before you share it with your observers. Ideally the record sheet should be quick and straightforward to complete, with a mix of pre-defined categories that the observer can select that best describes the visitor and their behaviour and a few open response boxes.
- Consider which variables about your visitors you are most interested in. Is it how different ages, genders, groups (couples, families, friends) or single visitors act in the museum? How will you record these demographics?
- Think about what it is that interests you about how the visitors behave. For example:
  - Is it their interpersonal skills with one another in response to displays?
  - Is it how they make contact with staff?
  - Is it how they are drawn to certain exhibits (and which ones)?
  - Is it the length of their visit in the gallery and / or the length of time they spend at different points in the gallery?
  - Is it the nature of their interaction with the display or others in the space (e.g. touching, talking, looking at, reading label, etc.)

For all of the above you will need to consider how this information can best be captured. You can ask the observer to note down patterns of behaviour on the gallery plan.

- Decide who will observe visitors and make sure they are sufficiently briefed so that they understand what information you wish to get from this exercise.
- Recording observed behaviour can be demanding and require intense concentration – aim to keep the observation fairly simple and pilot it first.



### Carrying out the observation

- Sample regularly so that you are not biasing the results (e.g. every hour on the hour for 15 minutes or every tenth person who enters the gallery).
- Try to keep notes to a minimum and use agreed abbreviations (e.g. LA = looked at; T = touched; AQ = asked question).

### Resource implications

Be prepared to spend a considerable amount of time analysing your results from the observation exercises. You can look for patterns, as Diamond (1999: p.56)\* suggests according to:

- Heavy, medium or light use of different areas
- Complete or incomplete visits (interacting with all or most exhibits versus interacting with only a few exhibits)
- Fast or slow visits
- Intensive, focused or minimal use

### Other considerations

- Make sure there is a clear sign visible that informs visitors that they are being observed and why they are being observed.
- Be prepared for visitors to ask you about the observation study. Don't be afraid to be upfront about the exercise. Do omit anyone from the record who explicitly asks not to be observed.

## 6.7 CREATIVE DATA COLLECTION METHODS

Evaluation doesn't have to be boring to be valid. In fact, in certain situations, and with certain audiences, introducing some creativity makes it more enjoyable for your participants, usually improves your response rate and can mean participants engage with the process more fully. If the questions that you pose of participants follow the advice set out in [Section 6.2](#), then you can be confident that you will still be collecting reliable and useful data. You need to think carefully about whether the method suits the audience and the activity or project you are collecting feedback on, whether the method you have chosen requires facilitating or is a stand-alone one (i.e. takes care of itself) and therefore if you need additional resources, such as staff to deliver it and to note down any outcomes arising from the dialogue. Some methods may be better suited to certain audiences, e.g. children and young people, families, or for use in more active focus group settings. The best advice is to take a pragmatic approach, to think what is likely to work best in your given context.

In addition to the list provided below, there is a freely available toolkit that offers some other ideas on creative ways to solicit stakeholder [feedback](#)<sup>7</sup>.

\*Diamond, J. (1999). *Practical Evaluation Guide: tools for museums and other informal education settings*. Walnut Creek, CA: Alta Mira Press.



## Stand-alone methods

### Graffiti Wall

Similar to a comments book but on a wall using removable paper such as post-it notes. There are many variations of this about, for example some Norfolk Museums Service venues have blank cards that hook onto wooden pegs for visitors to fill out (What did you enjoy about your visit today?). Another museum also used interchangeable magnetic strips each of which featured a different question on a white board that comment cards could be attached to with a magnet. This way the question could be changed regularly and a range of comments could be collected. The Roald Dahl Museum and Story Centre had a tree-shaped display encouraging visitors to say what they thought of the museum: *Is it wondercrump? Have you any ideas to make it even better? Use the leaf-shaped notes to leaf leave us a message.* It's simple but works.

The advantages of this method are that comments are displayed so that other visitors can read them, they can easily be taken away for analysis, and if there happens to be any inappropriate comments, these too can be removed.

### Voting discs

These are placed in a clear Perspex box with compartments labelled accordingly by category with a question above that can be changed regularly.

### Creative questionnaires

Make use of a theme linked to your event, exhibition or activity, for example designing your questionnaire around a scroll for a Medieval event or a telegram for a WW1 event. Have a series of sentences with blanks that people fill in and try to keep the language sensitive to your theme but still easily understood by a wide audience. Although aimed at children, these tend to be really popular with all ages and often result in a better response rate than a traditional questionnaire, particularly when they are handed out personally by a member of staff. There are examples provided online by SHARE Museums East.

## Facilitated methods

### Post-it note challenge

You can decide how many different colours to use and what they represent but to avoid things getting confusing, it's probably best to stick to no more than 3 or 4 colours. In the scenario described below, the post-it notes are being used in a focus group situation where the participants are involved in thinking about a gallery redevelopment. You could adapt it to other situations.

Green = things they like / would keep, Yellow = thing they are not sure about / would need more information on, red = things they dislike / would change). Instructions: Walk round the gallery space and place post-it notes on the displays / display cases or next to objects (but not directly on objects for care / conservation reasons) according to your impression of them. You can write any thoughts too on the post-it notes if you like. Afterwards, as a group or in pairs talk about any similarities / differences in the colours of post-it notes on the same displays. What made you place a green / yellow / red note here? What did you like / dislike about this object / display / information? What could be done to make you change a red or yellow post-it to a green one? Record the discussions and points that emerge.





### Timeline

The timeline for a project or activity is set out on a roll of paper and participants are asked to recall and reflect on specific questions about different stages of the project. Their responses are recorded directly onto the timeline or via post-it notes attached to the timeline. The responses are then discussed amongst the group.

This method could work equally well where the group of participants are museum users discussing their experience of a museum service or members of museum staff who are reviewing the service.

### Imagery

Participants are asked to choose an object or display that best represents their experience of your project or activity, e.g. Which object / painting / display etc best represents how you feel about the museum? What is it in particular that you like / dislike / identify with? What would you say about the museum to someone who had never visited it before? This type of exercise can also be adapted to ask respondents to represent their experience through a drawing or by using their bodies and props to create images. This is likely to work well with children and in situations where your activity or project is based around art or craft work.

### Mobile responses

Getting people mobile can help some groups (e.g. children) to engage more with the questions you are asking, as being active can stimulate thought processes.

So, you could label different corners of a room (e.g. agree strongly, agree slightly, disagree strongly, disagree slightly) and ask people to position themselves according to these labels when you make evaluative statements.

### Traffic lights

Agreement to evaluative statements is given according to flash cards:

Red = disagreement; green = agreement; amber = neutral. Participants are asked to hold up the relevant card in response to each statement put to them. This has been used in Norfolk Museums Service summer schools with children to good effect.

### Bull's eye chart

How successful a project or activity has been, can also be evaluated using a circular chart where the bull's eye would equate to 'I enjoyed it very much' and the outside ring would equate to 'I didn't enjoy it at all' with suitable categories in between. Participants are asked to place a marker on the chart according to each statement and are then asked to explain their response. You can adapt the question and answers as necessary.





## DID YOU KNOW?

### Using museum apps to understand your audiences

Museum Apps can provide another layer of information about your audiences, but this information is sometimes overlooked. Apps are designed for and used by both visitors and remote audiences. Apps for visitors usually offer content such as trails, additional interpretation, quizzes and interactive maps, alongside the physical visit. Apps for remote audiences tend to offer similar content but this is based around a virtual tour.

If you are commissioning a new Museum App, it can be helpful to consider at the design stage how you might gain an insight into users' behaviour / understanding whilst they are using, or as a result of using, the App. Analytics software can be used alongside your App to collect this information.

- Ways in which this might apply include:
- Quizzes – testing their knowledge, interest or enjoyment of informational material being provided by the App or other external interpretation that the App signposts them to
- If there is an element of collecting virtual items on a trail – how many people collected all items?
- Most popular content - which could aid with your understanding of what makes for digestible interpretation in a digital format
- Dwell time and most popular objects / places of interest (relevant in Apps that use trails and where there are beacon points that work with the App) – these can highlight 'warmer' and 'cooler' areas of spaces in terms of their popularity, helping to build up a picture of how galleries are used and could be improved, e.g. visitor flow
- The average duration of a session – giving you an idea, across all the downloads of the App, how audiences have engaged with the available information
- Certain basic information about your App users – e.g. age, country of origin, the operating system of their device. Remember though that this is information about who is downloading the App, not about all your audiences
- Providing interactive content that communicates with your social media platforms and that can be counted with a simple algorithm – for example if your App encourages people in your portrait gallery to take a selfie and upload it to your Instagram account, then a simple way of measuring this would be helpful.



## 6.8 OTHER IDEAS FOR SIMPLE OR LESS COMMONLY USED DATA COLLECTION METHODS

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### Verbal comments and comments books

Museum visitors will often make comments about the museum, both positive and negative, to members of staff. Too often these comments are not recorded centrally. This means that the comments as a whole cannot be reviewed collectively to look for patterns or shared effectively among all staff. It is a good idea, therefore, to have a book where all staff can record these comments, as well as their own, with at least one member of staff taking responsibility for monitoring the information and using it to evaluate the service. Additionally, many museums do have a visitor comments book. Sometimes the feedback given is constructive and therefore useful. Often however, this isn't the case, with visitors leaving remarks such as 'very interesting visit' or 'nice museum'. It can be a good idea to present your visitor comments book so that you ask for structured feedback, e.g. 'What did you enjoy most about the museum?', 'What could we improve on?' and 'Please provide any other comments'. Remember that for every question asking for positive feedback, you should really also have a question asking for critical feedback. This means that you aren't biasing your visitors' response.

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### WARNING!

Many visitor comments books continue to collect personal information, such as name and postcode, and to leave this information on display. **This is in breach of the Data Protection Act (2018)**. If you find yourself in this position then you need to amend any headings in your comments book so that you are not collecting and then displaying personal information in this way.

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### E-mails / letters of thanks or complaint

These can be recorded and used in a similar way to verbal comments made by visitors.

### Postcodes

Some museums collect the full postcode for every visitor. The full postcode gives a more accurate measurement of where a person lives, providing a more reliable insight into the geographical spread of British visitors (and therefore the local, regional and national visitor profile). Postcodes can also provide socio-economic information about your audiences as well as their likely behaviour when it comes to products and services. Often this kind of information comes at a price, through subscriptions to consumer segmentation software or companies, but there is some basic and useful analysis that can be done with postcodes using data freely available from the Office for National [Statistics](#)<sup>8</sup>, based around drive time analysis and with guidelines issued by the Association of Independent Museums. The Audience Agency is a Sector Support Organisation (SSO) for Arts Council England and offers a free audience data analytical service called [Audience Finder](#)<sup>1</sup>.

### Take-up of offers

One strategy sometimes used by museums to build new audiences is to run taster sessions, outreach sessions or community projects, taking the museum's collections and services to people who rarely or never visit. In these situations, it is useful to see what impact this has subsequently on your visitor profile; do these people then start to visit the museum regularly or for the first time? This can easily





be measured by providing vouchers to the participants that allow them free or reduced entry to the museum or reduced prices in the museum shop or café. By collecting these vouchers in and counting them against the total number handed out, you can get some idea of the take-up of this offer and so the impact on building new audiences.

### **Presentation / art work of user group**

If your project or activity has involved users in producing presentations or art work, then these can be used in discussions with the participants to explore what they have got out of the project or activity. It can be a clever way of gathering feedback that is embedded in the activity itself, rather than being seen as an 'add-on' data gathering exercise at the end of the project in the form of a questionnaire or formal interview.

### **Photographs / films**

Photographs and films can provide clues about how people respond to your museum by examining their body language and facial expressions, and whether or not they talk enthusiastically about the museum or remain silent. They can also be used as a method of gathering and recording feedback, particularly from users who may not respond well to providing written feedback. Photographs and films can also be used in any report on the evaluation of your project or activity, and to record the outputs of this work.



### Media coverage

Media coverage can provide you with an understanding of how your museum and its services are being presented by a third party, whether favourably or not.

### Meetings (debrief)

Staff meetings can be used as debrief opportunities to discuss what worked well and what worked less well with a project, a type of 'staff focus group', convened by an independent member of staff. The meeting could feature a presentation on users' feedback, followed by a discussion amongst staff of their response to this feedback and how they think any useful results could be carried forward in the future. A more holistic approach such as this would also assist the person reporting on the findings to collate and analyse the feedback from all stakeholders.

### Mentoring and peer review

These methods can be used to help individual members of staff and staff teams to track and evaluate their personal development at work, highlighting what lessons have been learned and how practices have improved as a result.

### Diaries, Blogs and Vlogs

Diaries, Blogs and Vlogs encourage reflective practice and are useful in recording your thoughts and any ongoing learning that takes place as a project develops. This type of information is often forgotten by the time you reach the end of the project. It gives an insight into the formative development of the project and, when reviewed regularly, can help you to identify whether you are on track or not. They are also useful for external individuals who are evaluating a project who can use these resources to understand the process of and direction a project has taken that they may not have been involved with from the start.

### Mystery shopping

Mystery shopping is something which the retail industry tends to use to help with the quality control of its services. In a museum context, it would involve having an independent person visit your museum to test out the level of service you provide, according to your staff and facilities, without warning museum staff that this was taking place. So, the mystery shopper would score the museum against a set of pre-defined criteria, such as 'helpfulness of staff', 'ease of accessing information', 'cleanliness of toilets' etc. Companies are set up to provide the services of mystery shoppers. SHARE has been running a Mystery Shopping project for several years. Usually launched in May each year, you can ask the SHARE team for more details.

### Staff (facilitated) visits

Once you have worked in a museum for a little while, it is fair to say that you can never be a true 'museum visitor' again. It is especially difficult to view your museum with a fresh pair of eyes from the perspective of a visitor. One museum recognised this and decided to set up a project where groups of visitors were accompanied by a member of staff. The member of staff was not allowed to provide any information about how to find galleries, toilets, café etc. or to explain any displays or offer any insight into the museum at all. They were meant to be part of the group, experiencing the museum as a visitor would do. Once the staff member had been fully accepted into the group so that conversation flowed easily, it became clear what obstacles were faced by the museum visitors and how interpretation, displays and general museum layout could be improved to overcome these barriers.





**7.**

# **MAKING SENSE OF YOUR DATA**

# 7. MAKING SENSE OF YOUR DATA

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“

**Everything that can be counted does not necessarily count; everything that counts cannot necessarily be counted.** ”

Albert Einstein

## 7.1

### INTRODUCTION

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How you make sense of your data will depend on a number of things, for example:

- The kind of data you have (quantitative and / or qualitative)
- How much time you have for the analysis (do you have time just to summarise the findings or can you go one step further and write a more detailed report on them too?)
- Why you need to do the analysis (is it so you yourself can better understand what is going on or do you need to present the results to a wider audience, and is this an internal or external audience?)

Never underestimate the amount of time that you (and others, if applicable) will need to make sense of the results, but you can be pragmatic about your approach to this. For example, a handful of short paper questionnaires that have used open questions could simply be collated and read to identify any common themes or opposing viewpoints – there is little need to input these into a spreadsheet or word processing document. Having several hundred returns of a longer questionnaire that has used open and closed questions will need a great deal more time to analyse and may need the use of software. Similarly, interviews and focus groups will also need a considerable amount of time to write up from notes or transcribe from recordings.

In many cases, you will first need to collate all the information you have gathered, this might be into a typed up format so that it can be stored and manipulated digitally, or it might be in one physical place (pulling together all the paperwork on a desk for example and sorting it into relevant categories). Again, which one might depend on the amount of information you have, the number of people working on the evaluation (multiple people needing access to the same information are going to find it easier if it is stored in one location, probably digitally) and your timeframe.

Once you have decided on an approach, the best starting point is to read through all the data to get a 'feel' for it. Note down any patterns that are emerging, such as a common response to a question, identify problematical questions (e.g. where people interpreted questions differently to their intended meaning) or unexpected results (e.g. high numbers of visitors over a specific period of time, any



surprising comments etc). This may also help you see the beginnings of a structure as to how you may organise the results. If you are working through the data with someone else, then doing this individually and reconvening to discuss what you have each found can stimulate new ideas and help boost confidence (giving you a sense that you are heading in the right direction).

The point to bear in mind while working through your data is that interpretation is key – don't just highlight the evidence available in your figures and quotes, you need to explain why these things are important, interesting or unusual. How do they relate to the original purpose of your evaluation, i.e. to assess the objectives and intended outcomes and deliverables of the project? Is there anything surprising that you did not expect to find out? Can you compare your results to other available information to put them in some context, e.g. visitor comments from this exhibition to a previous exhibition, staff feedback compared to the opinions of potential audiences, the demographic breakdown of your local visitors against that of your local population?

Often you will have both qualitative and quantitative information to assess and learn from. If this is the case then ideally you will use these alongside one another to build up a more in-depth picture of your project or activity. How to deal with each type of information is covered separately below.

## 7.2

### WORKING WITH QUANTITATIVE DATA

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This is information presented in numeric form which can be counted or compared on a scale. It is easily measured, e.g. the number of visits, the number of people who agree with a statement.

If you have a small amount of quantitative data, you can simply count it using a five bar gate system. An example would be if you simply need to know the numbers of people that fall into a category (e.g. male / female).

Conversely, if you have a large amount of quantitative data and if you would like to analyse it in a more nuanced way (what percentage of people aged 26-35 really enjoyed the exhibition compared to those aged 66-75?), then often you will need it presented in the form of a spreadsheet. If your survey has been delivered using online survey software, and your choice of package allows it, you should be able to download all the responses in a spreadsheet format ready for you to assess and manipulate as required. If you have collected responses via a paper survey then you have two options: (1) use online survey software to create a mirror image of your paper survey and use this as a form for manually entering each paper copy response, (2) create a spreadsheet yourself from scratch. Either option can be time consuming if you have a long survey and many responses to enter so think carefully about whether or not your analysis warrants you inputting the data in this way, or whether you can complete the analysis without this step (i.e. by sifting through the paper surveys and making notes).

#### Top Tips for creating and working with spreadsheets

If you are going to create a spreadsheet and input the data yourself then some tips are:

- Set up your spreadsheet so that the columns represent each question / category response and the rows represent each individual's answer to the survey



- Each completed questionnaire should have a unique reference number (e.g. 1, 2, 3) which you should write on the paper copy. This number should also be entered into the spreadsheet. This allows you to check any data entered against the paper copy, should you need to, at a later stage
- Assuming you are using Microsoft Excel, you can enter simple text such as yes, no, don't know, strongly agree, agree, disagree, strongly disagree, etc and then use the 'Count If' function to calculate the number of times this response has been recorded. You can also create simple drop down lists in Excel to make data entry to category questions quicker to record. A quick online search will take you to many video tutorials showing you how to use both the 'Count If' and drop down list feature, as well as others.

Think about how you might describe and summarise some of this data in a way that makes it easier for you and others to understand, for example using:

- Tables
- Graphs and Charts
- Percentages (remember to include the total number in your sample)
- Averages (covered below)

Useful resources on this topic are provided by [NCVO here](#).<sup>1</sup>

### Top Tips for working out your sample size

How representative are your results? They will most likely be based on a sample (e.g. visitors who answered a survey) of your population (e.g. all visitors). Data about your sample may not accurately reflect that of your population – for example, if 2,000 people visited an exhibition but you only had completed surveys from 50 people. What if 80% of people who completed a survey were female, would this mean that 80% of visitors to the exhibition were female? Probably not! What if your questionnaires were left out on a table for visitors to pick up and complete – is there a chance that a certain kind of person is more likely to complete it? Most probably. Written questionnaires tend to appeal to literate people, with no distractions and who are motivated either by a very positive or very negative experience. So bias can be introduced in your data collection method.

Being aware of sample size and bias are important because it means you are less likely to make false claims when comparing results from different populations. It's sometimes suggested that a good sample size contains about 100 responses, but quite often this figure needs to be much higher, depending on your variables. Various sample size calculators exist online but this one works [well](#)<sup>2</sup>. It tells you what sample size you should have based on your population size and margin of error.

### Top Tips for summarising data: averages

#### Mean, median and mode

These are all 'measures of central tendency' or 'averages'. They can be used to summarise data and to help you compare between different samples, e.g. the average age of visitors to exhibition A compared to exhibition B.

**Mean** = often called the 'average'. You add up all totals in your sample and divide by the number in your sample, e.g. in a sample of ten children attending an activity their ages are 11, 15, 9, 12, 9, 13, 10, 9, 14, 12. The total age is 114. Divided by 10 equals 11.4. This needs rounding down so the mean age is 11.



The mean tends to be fairly stable between samples (if you take a significant number of samples from the same population) so that this kind of average is likely to differ less than you would find with the mode or median (e.g. working out the average age of children attending each workshop if all are aimed at children). If you have outliers (i.e. numbers falling at each extreme, e.g. two people aged 2 years and 96 years) then you would be better off using the median as an average.

**Median** = middle value. Take the same sample above but we'll also add in a 3 year old. Then we put the ages of the children in order from youngest to oldest: 3, 9, 9, 9, 10, 11, 12, 12, 13, 14, 15. Now we have 11 children in the sample – the 6th child (i.e. the one falling in the middle of all the rest placed in order) is 11. Our median age is 11. Where you have an even number in your sample, e.g. the ages of 10 children, you would take the value (age) of the 5th and 6th person, add them together and divide by two to find the median value.

**Mode** = the most common. This is useful as a description when your sample concerns categories rather than quantitative variables (so you have no way of calculating the mean or median). For example, if you use age categories on a survey, you cannot work out the mean or median age, but you can say that the most common (or modal) age range at your exhibition was 35-44 years.



### DID YOU KNOW?

#### Two terms that you may have come across are validity and reliability

**Validity** = are your results real?

**Reliability** = are your results repeatable?

You need to be confident that the behaviours you observe and report are valid and that you have used reliable indicators. For example, observing a visitor looking at a label does not mean they have read the label (to say that they were reading it would have poor validity – what you can say is that they looked at the label). Observing only two visitors and then generalising their behaviour to all visitors would not be reliable, i.e. the more observations undertaken, the more reliable the results.

## 7.3

### WORKING WITH QUALITATIVE DATA

This is information presented in a narrative form that is usually textually or verbally rich in description, e.g. comments, conversations, written narrative.

One of the most useful ways of making sense of qualitative data is to identify patterns or categories into which your quotes or narrative will fit. There are two ways of doing this, or you can use a combination of the two methods.





1. You can have pre-defined categories that you use to group each piece of qualitative data under. For example, you might use the Generic Learning Outcomes and Generic Social Outcomes framework, GLOs and GSOs, [Feature 2](#) as a basis to sort and group your comments, particularly if these reflect some type of informal learning. Sometimes, you will find that certain statements fit under more than one GLO / GSO, in which case these become 'bridging comments', i.e. those illustrative quotes that help to link sections of your discussion together where you are covering different points.
2. Alternatively, or additionally, you may wish to go through all the quotes and create ways of grouping them based on patterns that emerge from the quotes themselves. The simplest way of doing this is to read through all the qualitative data, noting down any common responses or themes that emerge. On repeated readings, you can start to group these under the headings you first came up with, adding any additional categories that come up. Having each quote or piece of narrative on an individual piece of paper helps when you come to do this as you can physically move them around on the work surface you are using, until you are satisfied that all have been grouped to your satisfaction. You can also use the cut and paste function in your word processing software if you find this easier. More detailed guidance is provided below.

### Top Tips for making sense of qualitative data

Read through all the responses once to get a 'feel' for them. Then re-read through them as many times as needed noting or highlighting the following:

- Positive and negative comments
- Areas of agreement and disagreement
- Key words and phrases
- Patterns or themes (e.g. common responses or responses that can be grouped together)
- Things that provide an answer to your original objectives / intended outcomes / questions
- Anything surprising that stands out
- Isolated comments that are noteworthy
- Illustrative quotes that sum up a general opinion

Once you have pulled together some patterns in your data, reflect on your thoughts about the patterns. Are you surprised by any of the results? Do the results support or conflict with data from other sources? How might you explain some of these patterns?

Remember to:

- Involve others in the interpretation process or ask for their views on your interpretation of the results.
- Comply with the Data Protection Act (2018) and ethical evaluation practice [Section 9](#).
- Make sure you allow for a balanced view of feedback – this means considering opposing views in an impartial manner.
- At this point you can also start to think about how you might act upon the results. What will your recommendations be as a result of this information? What have been the learning points for you, your team or organisation?



**8.**

# **COMMUNICATING YOUR RESULTS**

# 8. COMMUNICATING YOUR RESULTS

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“

**The strongest argument is always the proof of your achievement, so it's a question of creating an evidence base of what you do but also ensuring what you do has lots of profile<sup>†</sup>.** ”

Alec Coles

## 8.1 PRESENTING THE RESULTS

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First and foremost you need to think about the audience for your report. This will inform the style of reporting and the level of detail you present. If, for example, it's to communicate something internally within a small team – feedback from one event to inform another that is happening quite soon after – then it could be as simple as a set of notes. It does not have to be complicated but it does need to get your point across. If it's to report to several stakeholders on a large-scale evaluation undertaken over several months or years, then a written report, perhaps including an infographic and oral presentation might be required.

Some examples of potential audiences for your findings could include:

- Board Members / Trustees
- Current / potential partners
- Contributors and individuals / organisations you have commissioned
- Friends of your organisation
- Funders
- Local authority / University / Another lead organisation
- MPs / Local Councillors
- Paid staff
- Press
- Visitors and members of the public
- Volunteers

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<sup>†</sup> Quoted in Museum Practice, Issue 49 (2010)



Often, museums are concerned about a conflict when reporting evaluation findings to different audiences, for example, to internal stakeholders compared with funders. Any report should aim to demonstrate that you have taken into account all stakeholders' feedback which might include feedback from staff or partner organisations as well as from those participating in the activity you are delivering. It should include your reflection on the outcomes of your project, programme or activity and should express the learning points of your work, ideally so that you and / or others may take this forward in the future. Even if your evaluation demonstrates that not every aspect of your project was a success, if you can explain how you will move forward from these areas, then this is likely to be of interest to both external and internal audiences. This is also discussed in [Sections 2 and 3](#).

There are many different media for reporting your findings. For example:

- Oral presentation
- Poster
- Written report or article
- Newsletter
- Video
- Infographic
- Social media / website

Different audiences will respond better to different kinds of reporting styles. For example, funders and policy makers may prefer a written report, oral presentation and / or video. Your museum users and remote audiences may be more easily informed through a poster in the museum, newsletter, social media or website. Videos often appeal to all different types of audiences as they can be more accessible to a wider range of people than information provided in a written format. Oral presentations and written reports should cover the same sort of territory, although a written report is likely to be more detailed. There is information set out below covering the ideal content for written reports and oral presentations. If you are interested in pursuing other types of media then NCVO has a useful summary of creative reporting methods, including tips for each one, that can be accessed [here](#)<sup>1</sup>.





## Six principles of a well-laid out written report

Remember to include the following in your report:

1. Title, date, author, page numbers, contents page and executive summary.
2. The context and purpose of the evaluation (e.g. its aims, objectives, intended outcomes).
3. The methodology, stakeholders involved and number of responses.
4. A discussion of the results and their interpretation. Try to use qualitative and quantitative data together if possible. Organise your results by theme or outcome area. Summarise large amounts of quantitative data with charts and use percentages (remembering to cite sample sizes).
5. Mention other research where it supports your findings.
6. A conclusion or summary, and, if relevant, a section on recommendations.

## For oral presentations and written reports

**The executive summary** (written reports only) draws together all the key points within the report, presented in the same order as the overall report. Depending on the length of the report, ideally it should be between 1 and 4 pages long.

**The introduction** provides the rationale for and context to the project, what the project was about, what you hoped to achieve, sets out the aim(s), objectives, outputs and outcomes for the project.

**The methodology** section presents information on which data collection methods you used, how you sampled your participants and how many participants you were able to survey. If you were reliant on a third party for information that was not forthcoming, it is acceptable to point this out (diplomatically). If there were other gaps or shortcomings in the data collection you need to point this out (plus why this occurred and how it may have affected the results).

**The discussion** covers whether or not you achieved your objectives and planned outcomes and why, any expected results, and presents the evidence for the statements you make from the analysis of data you have collected. There is more detail on this [on the next page](#).

**The conclusion** gives a summary of the project or activity, covering its strengths and weaknesses and the lessons learned along the way.

**The recommendations** indicate how you are going to act on the findings. It should build upon your lessons learned, giving examples of what you would repeat again, what you would do differently and how you might replicate your unexpected positive outcomes.

**The appendices** (if required) provide copies of your survey methods (e.g. questionnaires, interview guides, topic guides).



### Using data to build a picture

In [Section 7](#) you were encouraged to think about how the data you have collected answers your original evaluation questions. This is called interpretation. Essentially you are using the information you have gathered as evidence to support arguments or observations that you make. Ideally you will combine different types of evidence to provide a more complete picture of a project or activity and present this in a way that is easily understood by your audience. An excellent resource by Evaluation Support Scotland showing you how to do this is available [here](#)<sup>2</sup>. Other suggestions include remembering to:

- Present both sides of the argument if there are conflicting views. Offer a suggestion as to why there might be differences of opinion, if you think you know why.
- Offer your own commentary on the results by putting them in context – can you explain why visitors commented well or poorly on the gallery tours on a particular day? Indicate how sure you are of your explanation (*These results demonstrate that ... / suggest that ... / may indicate that ...*)
- Provide the number and percentage that is represented by numeric data, e.g. *At least 50 people surveyed (80%) commented that ...*
- Compare your results with other studies or previous studies and discuss any differences or similarities, e.g. *The outcome from the survey was that the vast majority of people (141 of the 150 respondents or 94%) wanted to see the museum open during the winter, whereas this was not the case five years ago. The reasons for this could be that ...*
- Balance your text with information presented visually, such as graphs and pie charts. These should indicate the total number in the sample.
- Use case studies, photographs or art work if it is available. These add a personal touch. If you are using photographs showing people, make sure you have the appropriate consents to go with them.
- Flesh out your figures with supporting quotes. For example, *Twenty-five of the 30 participants in the outreach session indicated that they had learned a new skill that day, one person commenting for example that 'I found out that I could make and decorate a pottery cup. I never thought I was very artistic before!'*
- Discuss your qualitative data according to the themes that you identified and used in the analysis stage.
- Present examples of any unexpected outcomes – where these desirable or not and why?
- Reflect on what worked well and what didn't and how you would repeat certain things or make changes accordingly.



## 8.2

### USING THE RESULTS

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You have probably invested a considerable amount of resource in your evaluation. Make sure you make use of the results. This can be done in a number of ways so that they are effectively carried forward by your organisation, or are shared more widely with external stakeholders.

#### Share the lessons learned and share them widely

An important element of any evaluation is the conclusions and recommendations that arise as a result. This information can be useful to others carrying out similar work and can inform your own future practice. When planning a new project, highlighting what you would like to develop from past experience demonstrates that you are serious about carrying forward this earlier learning.

You might belong to a network of likeminded practitioners who regularly share best practice. Being open with one another about your project evaluation outcomes can be one of the best ways of making your evaluation count. It means that together you are much less likely to make the same mistakes or keep 'reinventing the wheel'. An initiative in Denver in the US to create an evaluation network has resulted in a partnership involving 15 institutions with a grant to support professional development and the creation of evaluation resources. It aims to build evaluation capacity and to work collaboratively so that museum evaluation may be more effective as a joint enterprise. You can read more about it [here](#)<sup>3</sup>.

#### Informing policies

A really effective way of making use of your evaluation is to use it to change policies in your museum. It could also be as simple as putting together a Dos and Don'ts document for exhibitions – this document would be updated following each exhibition.

#### Team meetings

It works best if one or two people are given responsibility for leading evaluation in your organisation / project but make it clear that everyone can have an input into or say about the process. Then you can use team meetings to discuss plans and share the important outcomes of your work. Particularly for large projects (e.g. museum or gallery redevelopments) or for teams that are regularly reviewing a changing programme (e.g. exhibitions, events, schools), then having evaluation as an agenda item at an agreed, regular interval is a good way to ensure that it becomes embedded practice and is not an 'add-on'. This means that a wide range of staff can (1) inform each evaluation plan; (2) be consulted for their feedback on current exhibitions; and (3) find out what the outcomes of completed evaluation projects have been and apply this learning next time.



## Advocating for your museum

Advocacy is simply about how you try to influence others to gain support for your organisation. Whilst evaluation should not be undertaken purely to fulfil this need, it is one outlet for your results.

For example you may wish to publicise how well an exhibition went (reflected by higher visitor numbers and positive feedback), how you are contributing to 'social agendas' (how many volunteers you have, the hours they give to your museum and audience feedback on events or activities they deliver) or how effectively you are spending public or charitable money (the amount of match funding secured and the different things you have been able to deliver as a result, such as a more diverse range of people attending outreach sessions).

Influencing others can work in a number of ways because you may be looking to:

- Work towards a specific outcome (e.g. getting people to 'endorse' your museum at an event or in the media)
- Have ongoing support and 'allies' if needed at a future date
- Affect decision making
- Maintain a positive high profile.

It should always be about cultivating a two-way conversation – it's not just about telling people things, but listening to how they respond. But why do it at all?

In very simple terms, communication with others is important because you can tell them:

- What the museum stands for
- How it goes about its work
- What its value is socially, culturally and economically.

In listening to their opinions of your museum, you can find out:

- How people outside the organisation perceive the museum (and whether this matches up with the museum's view or not)
- If there are any misconceptions, how to address these and so change attitudes
- If you are delivering what stakeholders think is important.

Arts Council England offers online resources for advocacy purposes. These are grouped according to different kinds of [stakeholders](#)<sup>4</sup>.



**9.**

# **OTHER ISSUES**

**Ethical and  
lawful evaluation**

# 9.

## OTHER ISSUES

### Ethical and lawful evaluation

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#### 9.1

### THE DATA PROTECTION ACT (2018) AND GDPR

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The Data Protection Act (2018) replaces the Data Protection Act (1998). It controls how organisations, businesses and the government use personal information about people. It is how the UK has implemented the General Data Protection Regulation (GDPR), a regulation passed by the European Union which came into force in May 2018.

#### **What counts as 'personal information'?**

This covers data that relates to an identified or identifiable individual. It can include a name, a number, an address (if only one individual lives there for example), an IP address, a cookie identifier. In some rare instances it is possible that it could include just a postcode as some postcodes can cover a single address (and it is possible that a person lives alone). If you are collecting names alongside postcodes then it is highly likely you are collecting personal data. If you are delivering surveys online and have not switched off the setting to record the IP address with each response then you may be collecting personal data without realising it.

#### **What are my responsibilities under the Data Protection Act (2018)?**

Anyone responsible for using personal data must follow data protection principles. These are strict rules that set out how the information is used fairly, lawfully and transparently, for specified, explicit purposes, in a way that is adequate, relevant and limited to only what is necessary, accurate and, where necessary, kept up to date, kept for no longer than is necessary, and handled in a way that ensures appropriate security, including protection against unlawful or unauthorised processing, access, loss, destruction or damage. There is stronger legal protection for sensitive personal information which includes data on a person's race, ethnic background, political opinions, religious beliefs, trade union membership, genetics, biometrics (where used for identification), health, sex life or orientation.

Individuals are given the right under the Act to find out what information the government and other organisations store about them. This includes the right to be informed about how their data is being used, to access personal data, to have incorrect data updated, to have data erased, to stop or restrict the processing of their data, for data portability (allowing them to get and reuse their data for different services), to object to how their data is processed in certain circumstances.

#### **What are data processors and data controllers?**

Processing personal information counts as anything that you do with the data: collecting it, recording it, storing it, analysing it, reporting it, disposing of it. Someone who processes the data in any of these ways is called a data processor. This will be a person, sometimes an organisation, working on behalf of and under the instruction of the data controller. The data controller, usually an organisation, but



sometimes a sole trader, makes decisions about how and why to collect and use the data, and is responsible for ensuring that the processing of any personal information adheres to data protection legislation.

If you are going to process personal information, then you must ensure that your organisation as the data controller is registered to do so with the Information Commissioner's Office (ICO), although some organisations are exempt. This can be done by completing a simple form, available [online](#)<sup>1</sup>. Failure to notify the ICO is a criminal offence. The ICO has a very clear online guide about the DPA should you have further questions.

## 9.2

### GAINING CONSENT FROM PARTICIPANTS

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In some circumstances it is strongly advisable to gain written consent from participants. This means that you are adhering to ethical research practices and protecting the interests of both the evaluator / researcher and participants. This is particularly the case when working with vulnerable groups, such as children, in which case you would seek consent from the parent(s) or guardian(s). Situations where you should be obtaining consent from subjects, preferably written consent, include the taking of photographs and participation in interviews or focus groups. Parental consent is usually needed if interviewing children (i.e. aged 15 and under).

The act of filling out a self-completion questionnaire is in itself seen as a sign of consent. If you are aiming to carry out a longer-term evaluation, where you may interview or photograph a subject more than once, then it is acceptable to use one consent form for the entirety of their involvement in the project.

A participant consent form would normally:

- Give the name of the project or evaluation
- State who is the main contact
- Demonstrate that you will use information anonymously (if indeed this is the case)
- Store and process the participant's personal details according to the Data Protection Act (2018)
- Provide a statement regarding their consent to participate.

A place to provide their name, signature and date is required, as are details of how they may withdraw from the project or evaluation if they decide to at a later date. A sample consent form is provided on the SHARE website.





## 9.3

### KEEPING PARTICIPANTS INFORMED OF THE EVALUATION BRIEF

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Good practice guidelines issued by the [UK Evaluation Society](#)<sup>2</sup> indicate that all participants should:

- receive full information about what participation in the evaluation will entail for them
- be told what relevant data protection processes will be used during the evaluation, and that these will comply with the GDPR and the Data Protection Act 2018
- understand that data will only be processed with their informed consent
- be informed of the purpose of the evaluation
- be clear about and satisfied with how data is released (anonymised where possible, see below)
- have the opportunity to verify notes as a record of their participation, or to comment on how they are represented in the evaluation
- understand that they can withhold consent over the use of their data.

Most questionnaires should usually have an opening statement explaining the purpose of the survey and how the information will be used. In situations such as interviews, focus groups or observations, such clarity for participants is also needed. This can be easily achieved through the use of a participant information sheet which gives the name of the project, who is the main contact, and covers the points in the list above. An example of a participant information sheet is provided on the SHARE website.

## 9.4

### MAINTAINING A SUBJECT'S ANONYMITY

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Usually it is advisable to keep the identity of evaluation participants anonymous when you report their feedback, most definitely if this has been a principle of the evaluation that you have communicated to your participants. Sometimes, individuals are happy for their words to be attributed to them, but in many cases, it is best practice to de-personalise comments. So, for example, you can ascribe comments or quotes to that person in a generic manner, e.g. 'a member of the museum learning team pointed out that ...' or 'a front-of-house team member suggested that ...'. If you feel that even this level of reporting would be identifiable then you can be less specific than this. These general principles also apply when you are reporting on quantitative responses – you should ensure that an individual cannot be identified from any data you present.



## 9.5

### BEING ACCESSIBLE

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Museums are often reliant on gathering user feedback via written formats (e.g. comments book or questionnaire). This is not particularly accessible to many people. It is best to offer people a range of feedback methods so that everyone has some way in which they feel able to comment. In addition to comments books or questionnaires, you could try some of the ideas suggested in [Section 6.7](#) or the following:

- Feedback collected via your website or social media. Make sure that your website complies with accessibility best practice, e.g. avoid using Flash or moving text, make sure all images are labelled, create a summary of your website on a text-only HTML page etc.
- A phone-line staffed by people trained to take visitor feedback.
- Touch screens to gather visitor feedback via digital survey. These can replicate questions on written surveys so the results from the two methods can be combined.
- Making sure you have spare copies of the questionnaire in large print should anyone need one (e.g. Arial in point size 16 or larger). Advertise appropriately the fact that large print versions are available.
- Encourage front-of-house staff to undertake informal conversational interviews with visitors and become the 'eyes and ears' for understanding how visitors use the museum and interact with museum displays. Make sure this information is recorded centrally and reviewed regularly.
- Having surveys aimed at children available, both digitally or in hard copy. These should use language suitable to their reading age. They can feature simple statements or questions in speech or thought bubbles that children respond to by ticking emoticons, colouring in, writing or drawing their answer. Some children may still need adult supervision to complete these questionnaires. Examples are provided on the SHARE website.
- If you are a museum that welcomes many visitors for whom communicating in English would be a barrier, then consider translating your survey into the most commonly spoken foreign languages at your venue. To mitigate for not understanding any open question text responses you receive, you may need to be prepared to process information using free online translation software (which may prove time consuming) or to adapt your survey so that it only has tick box questions and answers.



# 10. EVALUATION PLANNING TOOL

# 10. EVALUATION PLANNING TOOL

## YOUR PROJECT'S INPUTS

What resources will you need to deliver any activities and the numbers of people who will engage with these activities?



## YOUR PROJECT'S OBJECTIVES


## WHAT ARE THE PROJECT'S AIM(S)?

How can you formulate your objectives to be SMART?

Do your objectives reflect how you will achieve your project's aim(s)?



## YOUR PROJECT'S OUTPUTS



## YOUR PROJECT'S OUTCOMES

What changes or effects will come about as a result of your project? Can you re-word your objectives as outcomes? You can formulate these for different stakeholders, e.g. the museum, paid staff and volunteers, audiences, partner organisations

How will the things you deliver make a difference to people? What kind of difference will they make?

How will you measure your outputs and outcomes? How will you capture these measures?\*

For your list of stakeholders, how will you solicit their views to gather a range of opinions?

### TOP TIP

\*Think carefully about how you will measure your outputs and outcomes, e.g. an increase in visits, attracting greater numbers of local visitors, improved knowledge, sense of well-being, enjoyment. Some will be easier to measure than others. To decide how to capture each one, you will need to choose an appropriate data collection method, e.g. number of ticket sales, people counters at gallery entrance, postcode collection at reception, exit survey, stewards comments book.

# 11. INDEX OF KEY TERMS

# 11.

## INDEX OF KEY TERMS

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**Activity** in the context of this toolkit refers to a single piece of delivery, such as a talk, event or outreach session.

**Distance travelled** is an expression which refers to the degree of change a person makes in terms of soft outcomes (see below, under 'Outcomes') within a period of time. To measure distance travelled, you need to have a baseline score against which to compare subsequent measures.

**Evaluation occurs** at a specific point in time. It may use monitoring information as well as other data to look at the progress made against benchmarks set earlier in the activity. It is a way of measuring the effect and/or performance throughout the activity and may question its overall direction and the benchmarks themselves. See the definitions for front-end, formative and summative evaluation below.

**Formative evaluation** occurs during the process or development of your project or activity. It involves testing out a prototype or mock-up (e.g. display, text panel) with your users and refining the model until it is sufficiently improved. This means that you do not commit all of your resources to the final product without knowing if it works in practice (e.g. is accessible, readily understood or works mechanically, in the case of interactive exhibits).

**Front-end evaluation** occurs during the planning stages of a project or activity, when data is analysed to help assess the value of plans before resources are committed to developing the project. It is used particularly during the planning stages of museum and gallery redevelopment. Front-end evaluation includes:

- The process commonly known as 'public consultation', when people are consulted as to their expectations of the project's outcomes (e.g. how can this museum be developed in a way that is inclusive and accessible to everyone?)
- Existing national or local data that may provide information about your baseline audience and target audience
- Surveys set up specifically for the project to gauge your target audience's current knowledge.

**ILFA** stands for 'Inspiring Learning For All' and is a framework to measure and define the informal learning opportunities that museums, archives and libraries provide. It gives organisations the tools to plan delivery, demonstrate their outcomes, particularly soft outcomes, and inform continual improvements to service delivery. Generic learning outcomes (GLOs) and generic social outcomes (GSOs) are part of this framework.

**Informal learning** refers to learning that is uncertificated, flexible, unstructured and spontaneous, i.e. learning that takes place outside a dedicated learning environment, such as a classroom. Informal learning could also be said to cover the learning that we go through on a day-to-day basis during our lifetime (e.g. 'life skills'). Informal learning is important in a museum context: while users may acquire new knowledge about an object, this does not fully capture all the learning that happens, such as an increase in interpersonal, communication, research and cognitive skills, etc.





**Impact\*** refers to broader and more longitudinal change than that achieved by a single outcome. Impact tends to come about through the cumulative effects of several outcomes.

**Inputs** are the resources put into the work to deliver outputs, such as time, money, staff and premises.

**Measures of success** are how we measure whether or not our objectives, outcomes and outputs have been achieved. They might include an increase in the number of people to attend an exhibition (by a given percentage), a certain number of people giving a positive or negative response in a questionnaire, recruiting the desired number of volunteers or Trustees.

**Milestones** are the interim measures that you put in place to monitor the progress of your project, for example, (1) agree data for collection; (2) the collection of all data; (3) the analysis of all data. You may need to report against milestones in monitoring reports.

**Monitoring** is the ongoing collection and analysis of information to 'spot check' the progress of an activity at any given time.

**Outputs\*** cover the services and facilities that are delivered, e.g. six outreach sessions, nine events, three publications. It can also include the number of visitors or participants.

**Outcomes\*** refer to the changes and effects that come about as a result of your efforts, e.g. people are more likely to visit the museum. Outcomes can be both 'hard' and 'soft'. Hard outcomes tend to be clearly definable and quantifiable results that demonstrate how an individual or group of people have moved towards a goal, such as gaining a certificate of participation for a project, 20% of visitors become repeat visitors, 30 volunteers are recruited. Soft outcomes are not easily measured directly as they are often intangible. They may include personal achievements that relate to interpersonal, organisational, analytical or personal skills, such as feeling more positive towards museums or finding it easier to order sequences as a result of an interactive exhibit. Learning outcomes refer to the things that people have learned as a result of something, such as an experience or participation in a project or event.

**Project** in this context refers to things like an exhibition, museum or gallery redevelopment or a programme of events, talks, outreach sessions or staff development initiative.

**Retrospective evaluation** happens when you realise that it is too late to even carry out summative evaluation, for example, following the closure of a temporary exhibition. Retrospective evaluation is not recommended, as it will probably mean that you have gaps in your data sources (leading to an unbalanced evaluation).

For example, you may find that you have to use visitors' quotes given in a newspaper article but you will have had no control over how these quotes were gathered or presented. Hence you will not know how representative they are of the visitors' feedback.

**Summative evaluation** occurs at the end of your project or activity, when you may wish to assess the impact of the 'finished product', be it a new gallery, an outreach session or a new brochure. If the results from summative evaluation are then used subsequently in planning a similar exercise in the future, then they become a form of front-end evaluation.

\*Terms such as impact, outputs and outcomes can be defined in a number of ways. The explanations given define the use of these terms in this toolkit.





# 12. EXTERNAL RESOURCES

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## EXTERNAL RESOURCES

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### Section 2: What is Evaluation FAQs

The start of this blog post from the London Museum Group by Kate Steiner, (who at the time was) Head of Audience Research, The Science Museum covers the value of front end research with real-life museum examples:

<sup>1</sup> <http://www.londonmuseumsgroup.org/2012/12/21/one-project-finishes-another-one-starts-better-2/>

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The V&A museum use front-end, formative and summative evaluation and research in their gallery projects, exhibitions and events programme. You can read how [here](#):

<sup>2</sup> <http://www.vam.ac.uk/content/articles/l/evaluation-at-the-v-and-a/>

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The British Museum undertakes visitor research to inform its temporary exhibitions and developments to permanent galleries. It has produced a number of reports that are available [here](#):

<sup>3</sup> [https://research.britishmuseum.org/research/research\\_projects/all\\_current\\_projects/visitor\\_research.aspx](https://research.britishmuseum.org/research/research_projects/all_current_projects/visitor_research.aspx)

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From Evaluation Support Scotland a resource called *Messages about evaluation, from grantholders for other grantholders*:

<sup>4</sup> [http://evaluationsupportscotland.org.uk/media/uploads/messages\\_about\\_evaluation\\_-\\_update\\_oct\\_2019.pdf](http://evaluationsupportscotland.org.uk/media/uploads/messages_about_evaluation_-_update_oct_2019.pdf)

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Arnstein, Sherry R.(1969) 'A Ladder Of Citizen Participation', Journal of the American Planning Association, 35: 4, 216 — 224:

<sup>5</sup> <https://www.participatorymethods.org/sites/participatorymethods.org/files/Arnstein%20ladder%201969.pdf>

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[Back to section 2 >](#)



## Feature 1: Evaluation and Museum Accreditation

Accreditation Guidance can be found here:

<sup>1</sup> <https://www.artscouncil.org.uk/accreditation-scheme/about-accreditation>

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The Association of Independent Museums has published a useful guide called Successful Visitor Experience – Getting It Right:

<sup>2</sup> <https://www.aim-museums.co.uk/wp-content/uploads/2017/03/Successful-Visitor-Experience-2017.pdf>

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Here you can find recommended resources that support the user-focused requirements of the UK Museum Accreditation Scheme:

<sup>3</sup> <https://collectionstrust.org.uk/accreditation/users-and-their-experiences>

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[Back to Feature 1 >](#)

## 4. The basics; what you need to know before you get started

Some useful advice from Ed Rodley, a museum professional in the USA about the practicalities of what does / does not work in the approach to co-production in museums:

<sup>1</sup> <https://thinkingaboutmuseums.com/2011/07/13/co-production-co-creation-co-curation>

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Short film about small pilot project in museum in NE called *Engagement to co-curation*:

<sup>2</sup> <http://ourmuseum.org.uk/engagement-to-co-curation>

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Nina Simon, Museum of Art and History, Santa Cruz talks very engagingly about how the museum became a community hub because it opened itself to be of/by/for all their community:

<sup>3</sup> <https://vimeo.com/276300637>

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The Participatory Museum, a book by Nina Simon:

<sup>4</sup> <http://www.participatorymuseum.org/>

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[Back to Section 4 >](#)



Power to the People is a framework, available from the Museums Association, to help museums understand and improve their participatory practice and community engagement:

<sup>5</sup> <https://www.museumsassociation.org/download?id=1254507>

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You can read about how Glasgow Museums have successfully used Advisory Groups in the past, and their thoughts on the pros and cons of this initiative

<sup>6</sup> <https://www.museumsassociation.org/museum-practice/your-audience-research-case-studies/15082012-glasgow-life>

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[Back to Section 4 >](#)

## Feature 2: Evaluation and Inspiring Learning For All (ILFA)

Launch page to the Inspiring Learning for All framework on the Arts Council England website:

<sup>1</sup> <https://www.artscouncil.org.uk/advice-and-guidance/inspiring-learning-all-home-page>

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Here you can find a wealth of tools (e.g. plans, surveys, question banks, templates, tick lists) developed for use with ILFA:

<sup>2</sup> <https://www.artscouncil.org.uk/resources#section-1>

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Resources to help you use the GSOs and GLOs together can be found here

<sup>3</sup> <https://www.artscouncil.org.uk/generic-social-outcomes/additional-gso-resources>

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[Back to Feature 2 >](#)

## 5. Getting started: planning your evaluation and using the evaluation checklist

From Evaluation Support Scotland, there is a short video on creating an evaluation plan:

<sup>1</sup> <http://evaluationsupportscotland.org.uk/resources/482>

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And also from Evaluation Support Scotland there is a resource on developing a logic model:

<sup>2</sup> <http://www.evaluationsupportscotland.org.uk/media/uploads/resources/supportguide1.2logicmodelsjul09.pdf>

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[Back to Section 5 >](#)



Very detailed guidance on finding and appointing a consultant, writing a brief and working with them effectively.

<sup>3</sup> <http://www.sharemuseumeast.org.uk/wp-content/uploads/2018/09/SHARE-Museums-East-Guide-to-working-with-freelancers-FINAL.pdf>

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Aimed at funders but equally relevant to anyone thinking of appointing an external evaluation consultant.

<sup>4</sup> [http://evaluationsupportscotland.org.uk/media/uploads/resources/final\\_external\\_evaluation\\_principles\\_for\\_funders.pdf](http://evaluationsupportscotland.org.uk/media/uploads/resources/final_external_evaluation_principles_for_funders.pdf)

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The Museum Development Network represents all national Museum Development providers and practitioners that support Accredited museums in England, Scotland, Wales and Northern Ireland and has links to each of the relevant websites:

<sup>5</sup> <https://museumdevelopmentnetwork.org>

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The University of Leicester Museum Studies Jobs Desk:

<sup>6</sup> <https://www2.le.ac.uk/departments/museumstudies/JobDesk>

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The Visitor Studies Group. A membership organisation. Offers resources and an annual conference:

<sup>7</sup> <http://visitors.org.uk>

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[Back to Section 5 >](#)

### Feature 3: Other tools and frameworks

National Lottery Heritage Fund – Wellbeing Guidance

<sup>1</sup> <https://www.heritagefund.org.uk/publications/wellbeing-guidance>

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UCL Museum Wellbeing Measures Toolkit

<sup>2</sup> <https://www.ucl.ac.uk/culture/projects/ucl-museum-wellbeing-measures>

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The What Works Centre for Wellbeing

<sup>3</sup> <https://measure.whatworkswellbeing.org/homepage/intro>

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[Back to Feature 3 >](#)





Impact & Insight Toolkit:

<sup>4</sup> <https://impactandinsight.co.uk>

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Better Evaluation. Online platform with contributors from around the world. It offers a host of resources on evaluation. For example, you can find out more about participatory evaluation:

<sup>5</sup> [https://www.betterevaluation.org/en/plan/approach/participatory\\_evaluation](https://www.betterevaluation.org/en/plan/approach/participatory_evaluation)

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The Power of Reflection: An introduction to participatory evaluation techniques.

<sup>6</sup> <https://resources.beststart.org/product/j25e-introduction-participatory-evaluation-techniques-manual/>

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[Back to Feature 3 >](#)

## 6. What data collection methods are out there?

Audience Finder a national audience data and development tool aimed at cultural organisations:

<sup>1</sup> <https://audiencefinder.org>

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MuseWeb, originally set up as Museums and the Web in the 1990s, now has a wider remit for culture and technology. It is based in the US with an annual conference but welcomes membership from around the world. You can sign up for free and access papers that draw on both research and practice:

<sup>2</sup> <https://www.museweb.net>

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Tate is well known for being at the forefront of strategies for audience engagement through social media and their evaluation. Well worth a read and a watch is this short summary and presentation on use of Twitter as a communication, conversation and audience research tool at The Tanks:

<sup>3</sup> <http://www.londonmuseumsgroup.org/2013/08/15/museums-and-social-media-how-and-what-to-evaluate>

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A fuller discussion of the work is also available here:

<sup>4</sup> <https://mw2013.museumsandtheweb.com/paper/diving-into-the-museums-social-media-stream>

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[Back to Section 6 >](#)



Culture24: How to evaluate success online. Includes a report, social media metrics toolkit and more.

<sup>5</sup> <https://www.keepandshare.com/doc/3148918/culture24-howtoevaluateonlinesuccess-2-pdf-september-19-2011-11-15-am-2-5-meg?da=y>

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Museum Analytics compiles these metrics and produces ranking lists for museums around the world

<sup>6</sup> <http://www.museum-analytics.org>

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Creative ways to solicit stakeholder feedback, including visual, verbal, and kinesthetic approaches

<sup>7</sup> <https://www.publicprofit.net/Toolbox>

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The Office for National Statistics

<sup>8</sup> <https://www.ons.gov.uk/>

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[Back to Section 6 >](#)

## 7. Making sense of your data

NCVO – How to analyse quantitative data for evaluation

<sup>1</sup> <https://knowhow.ncvo.org.uk/how-to/how-to-analyse-quantitative-data-for-evaluation>

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Creative Research Systems – sample size calculator

<sup>2</sup> <http://www.surveysystem.com/sscalc.htm>

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[Back to Section 7 >](#)

## 8. Communicating your results

NCVO – How to use creative reporting formats for evaluation

<sup>1</sup> <https://knowhow.ncvo.org.uk/how-to/how-to-use-creative-reporting-formats-for-evaluation>

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[Back to Section 8 >](#)



Evaluation Support Scotland – Stats & Stories in community settings: a guide to blending different types of evidence in evaluation reports

<sup>2</sup> [http://www.evaluationsupportscotland.org.uk/media/uploads/resources/ess\\_stats\\_%26\\_stories\\_may\\_2019\\_reduced\\_for\\_web.pdf](http://www.evaluationsupportscotland.org.uk/media/uploads/resources/ess_stats_%26_stories_may_2019_reduced_for_web.pdf)

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Denver Evaluation Network – Building evaluation capacity in museum professionals throughout the Denver metro area

<sup>3</sup> <http://www.denverevaluationnetwork.org/>

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ACE toolkit – Make the case for art and culture

<sup>4</sup> <https://www.artscouncil.org.uk/advice-and-guidance/make-case-art-and-culture>

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[Back to Section 8 >](#)

## 9. Other issues: ethical and lawful evaluation

The Information Commissioner's Office

<sup>1</sup> <https://ico.org.uk>

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The UK Evaluation Society

<sup>2</sup> <https://www.evaluation.org.uk>




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[Back to Section 9 >](#)



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## Contact us

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