Appendix
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How are we doing? A short guide to evaluating your project

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1. Introduction

Every project aims to achieve something. The organisers of a project are almost always interested in whether its aims have been achieved and they can do this through a process of evaluation.

Evaluation establishes the 'value' of a project, not in monetary terms, but in terms of what the project has set out to achieve. A well designed evaluation involves the collection and analysis of information (or 'data' as it is often called) about the project, conclusions about the extent to which its aims have been achieved (how successful was it?) and lessons learned that will benefit future projects. Put like this, it is easy to see how, for the designers and organisers of a project, evaluation can be an enjoyable and rewarding process.

The Capability Brown Festival has asked evaluator Phyllida Shaw to work with the sites taking part in the Festival in 2016, to help you decide what to evaluate and how, and to help us evaluate the extent to which the Festival has achieved its objectives.

2. Who designs an evaluation process?

You can do it yourself or you can bring in someone independent to work with you. Whatever you decide, as the organiser of a project, you have a key role to play in designing its evaluation.

The purpose of evaluation

Every evaluation process starts with the same question: "What is our project aiming to achieve?" Your evaluation will determine the extent to which the aims of your project are being achieved, or have been achieved, so knowing what your project's aims are is essential.

The organisers of the Capability Brown Festival, for example, have three aims:

i.   To build new audiences for Capability Brown's work

ii. To increase knowledge and understanding of Brown's work

Iii. To seed new relationships between organisations and individuals, in support of public access to and research into heritage

The evaluation of the Capability Brown Festival is looking at the extent to which these three aims are being achieved.

Some of the sites taking part in the Festival are well used to articulating their aims; others may not have needed to do this before. Here are three, invented, examples that three different sites might be working towards:

EXAMPLE 1

Through our project, we are aiming to attract more visitors to our site over the next two years and to increase people's knowledge of landscape design.

EXAMPLE 2

Over the next twelve months, our aim is to build a team of volunteers aged sixteen and over and to provide them with a variety of opportunities to volunteer at our property.

EXAMPLE 3

We aim to organise our first weekend food and drink festival, featuring local produce and local musicians, storytellers and artists, to celebrate local talent and attract local visitors.

Why are we evaluating our project?

The next step is for those involved in designing your project to agree on why you will be evaluating it. Most projects can be reviewed from several different angles but there are rarely the resources (people and time) to cover all of them.
So, agreeing on why you are evaluating the project and who your evaluation is for will help you to decide what you want to find out.

In most cases, there are two main reasons for evaluating a project. One is to learn from the experience or organising it and to use what you learn to inform future activity. The flow is more even during the day, aim to count for half an hour, every other hour. The important point is to record the times during which you counted visitor numbers so that in your report you can say: we were open for five hours on Saturday 15th May. We counted every visitor who arrived in the first two hours of the day and for one hour from 2pm-3pm. The total number between these hours was 200.

If you want to know the number of first time visitors and the number who came for the first time because of the Festival, you will need at least one volunteer, with a notebook, or sheets of paper on a clipboard, or a tablet (iPad or similar) - whichever they prefer - with which to record the answers. The method they choose needs to be prepared with the two questions, so that each answer requires no more than a tick.

It is not practical to ask every visitor a question and you don't need to. You decide how many people to question, depending on the number of volunteers you have to help. You could decide, for example, to stop every tenth visitor. Again, the important point is that your record your method and include this in your report. At the end of the day you will be able to say, on Saturday we had an estimated 400 visitors. We spoke to 50. Of these, 30 were first-time visitors and 20 of them were there because of the Festival.

3. Using qualitative data

This takes more effort to organise but the insights that qualitative data provides into people's opinions and experiences are rewarding and well worth the effort. The key is to organise what is manageable for you and to do it well.

During the Capability Brown Festival, something like 150 sites of different sizes and types will be running some kind of project. A small site opening for one day, or a large one showing a Festival-funded exhibition as part of a much bigger programme of events may think the amount of data they can provide about visitors or participants or volunteers will be of little value. Not so.

In a Festival involving a large number of site and activities, even a modest amount of feedback from each one will contribute to the big picture and help the Festival organisers to answer their evaluation questions. We anticipate that most sites will actively enjoy finding out what visitors, volunteers and others think of their part in the celebration of Brown's tercentenary.

Examples of collecting qualitative data

Many of the professionally managed and regularly visited sites have tried and tested methods of collecting qualitative data and will no doubt use some of them to collect information about their Festival activity. For sites with less experience of evaluation and fewer resources, here are some ideas.

You have created a trail that takes visitors to different viewpoints in the landscape and provides written information at each. You are interested to know what visitors think of the route. How can you do this?

At the end of the trail, or as they are about to leave the property, visitors are invited, by a volunteer, to recall the viewpoint they enjoyed most and to say why. Visitors can also be asked to give the route a simple mark out of 10. Their answers need to be written down. How? An effective method for all age groups is to provide **luggage labels on string** (home made if preferred), pens and a structure to tie the labels to (an artificial tree branch, or a trellis, for example). If there are volunteers available, they can informally ask visitors to write on a label before they leave. If there are no volunteers, the invitation can be made in writing in a prominent position, close to the materials needed for writing answers.

Someone needs to be responsible for untying the labels and keeping them in a safe place until the agreed number has been reached. The same method can be used to ask visitors what they think of an exhibition.

Another option is to have a **comments book** near the exit and to have a volunteer inviting visitors to leave a comment, if they would like to. Comments books work well for adults but are less interesting to younger visitors.

If you are organising an exhibition, which visitors explore in their own time, you might be interested to find out how long they are spending on different parts of the exhibition, whether they are talking to their companions about it and asking questions of exhibition stewards (or equivalent). This kind of information can be collected through **observation**. The site decides how many visitors it would like to observe over the course of the exhibition and deploys volunteers as and when they are available. A volunteer can work on this alone or two or three can work together.

The volunteer is supplied with a pile of **pre-printed cards** (A5 or smaller). The card lists the different parts of the exhibition. The volunteer chooses a visitor to observe as s/he enters the exhibition and unobtrusively records their progress, estimating the amount of time spent looking at different exhibits and records obvious reactions. The completed cards need to be stored in one place, so that whoever is analysing them can collect them. (In the case of the Festival, we are only asking sites to collect and temporarily store data for us. We will do the analysis.)

Small group discussions of invited participants, prompted by a prepared list of questions, can be helpful in understanding the impact of a project and how well it has gone. These kinds of discussions work equally well for participants who are familiar with a site (as a visitor or volunteer) and for first-timers, for adults and for children and young people. For example, a creative writing project involving local schools will come to life as children describe what they thought and did on site and in the classroom, and what they learned about Brown. A discussion with a group of older adults, who have been working for several months on a collage of a Brown landscape reveals not only their opinion of the project but the other benefits of working together over time. Discussion with a small group of long-term volunteers at a little known site, who have been researching the history of the site and welcoming more visitors in 2016 than ever before, provides an insight into what motivates volunteers and how to make the most of their skill, experience and time.

The ground rules for a good discussion are to involve no more than eight people, invite them personally, limit the discussion to an hour, provide light refreshments and ask someone confident and friendly to guide the discussion. It is always better to hold two or three small discussions rather than one large one, because the larger the group, the more it feels like a 'meeting' and the harder it is for everyone contribute.

Most sites will have a volunteer or member of staff with the confidence and skill to guide the discussion in a friendly and inclusive way and make sure everyone has the opportunity to speak. The questions will depend on the project that is being evaluated but typical questions might include: What role did you play in the project? Why did you get involved? Did the project live up to your expectations? What was good about it? What was less good? Are there any changes you would like to suggest for future projects of this kind?

The invitation list for a group discussion and the questions to be asked should be prepared with the help of the organiser or leader of the project, but the discussion will flow more freely if the organiser or leader is not present. Even when a project has been a great success, participants will often have something to suggest which they may decide not to share if they think it will hurt the organiser's or leader's feelings. A volunteer could be asked to take notes, or the discussion could be recorded using a mobile phone or tablet. No transcription is needed, because the sound files can now be emailed to whoever is writing the evaluation report.

Filming is another good way of collecting qualitative data. Some sites will have volunteers and participants who would enjoy using a tablet or smartphone to film short (three-minute) interviews with each other over the course of several months. The subject would be their experience of the project at that moment. This will not appeal to (or be feasible for) all, but it is worth suggesting because of the immediacy of the feedback collected and because using the technology will excite some participants more than providing written feedback or taking part in a discussion group.

Here is an illustration. A site has invited a choreographer to make a new dance piece to be performed by members of a local youth dance group. The project lasts eight weeks. At appropriate moments in the project the choreographer, the dancers, their leader and the volunteers, who are watching rehearsals in progress, record, on film, their answers to the evaluation questions. So, for example, if the project has been designed to make young people take more notice of the landscape, is it doing that? If it has been designed to bring new visitors to the site, is it doing that? What do the volunteers think the project is contributing to the young dancers' appreciation of the site? Audience reactions to the public performance could also be recorded.

This is not about making a film. It is about using film to record responses and no skill in film making or editing is required. One person would need to take responsibility for agreeing with colleagues who would be asked to contribute and when; ensuring the interviews are taken off the tablet and stored; and forwarding the interviews to whoever is writing the evaluation report. In the case of the Festival, this is Phyllida.

4. Collating, analysing and reporting data

For Festival activity we will do this for you, but here are some pointers for when you are evaluating a project of your own.

Identify one member of your team to be the evaluation coordinator. This one person will be responsible for collecting data collected from your volunteers (numbers recorded on the clickers, notebooks recording visitor numbers, observation cards, notes or recordings of group discussions, labels, comments books, film footage, etc.) and for holding it safely until you are ready to analyse it. (For longer projects, it is likely that you will want to analyse some of this data as you are going along, as it may inform the way you deliver the rest of the project.)

Share the task of collating and analysing what you have collected. Different members of your team will be interested in, or good at, analysing and reporting different types of data: someone who enjoys counting numbers and making calculations; someone who enjoys reading comments and pulling out regularly repeated comments; someone who enjoys listening to recordings, etc.

As everyone knows, data can be interpreted in different ways. Once you have your results, bring together the key members of your project team for a thorough discussion of what you have found. Take into account what might have influenced the results; talk about into account internal and external factors and agree your interpretation of the results. You are then ready to write your report. It is helpful for others if you organise your findings and conclusions in response to the questions you set out to ask at the beginning of your evaluation process. The report becomes a record of the project and of the lessons learned.