## EVALUATION TOOLS

This document was created for two RCUK funded projects: the Catalyst and the School-University Partnerships Initiative (SUPI). The Catalyst project aims to support a culture of publicly engaged research, while the SUPI project facilitates early career researchers sharing their research within classroom environments. Both projects require periods of reflection on practice and the tools outlined in this document are designed to help that process.

There are two roles for evaluation:

1. to evidence what you did (and why),
2. to improve practice

In both projects there is a need for people to reflect on their practice for both purposes outlined above, however, there is also a need for evaluation tools to be unobtrusive so as to not affect the quality of the experience. Many of the tools outlined here can be integrated into activities so the participants' experiences are uninterrupted.

This document covers a range of tools which the reflective practitioner might find useful. It is by no means comprehensive, but it hopefully provides some ideas on how to integrate tools for evaluation into educational/engagement activities. We also provide further reading at the end where readers can go for more information.

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A note on ethics: some universities feel that data collected for evaluation purposes does not require the same ethical scrutiny as for research purposes. Even if this is the case, it is worth considering the ethics of your data collection carefully. You are eliciting and capturing peoples' opinions before interpreting them and sharing them with others. Peoples' opinions belong to them so be ethically cautious when collecting evaluation data. There may also be privacy issues related to capturing and using images (moving or still) of participants.

For more information the BERA (2011) ethics guidelines set out key ethical issues to think about when undertaking data-gathering with young people, these principles can be applied to all participants. BSA's Visual Sociology Group (2006) have a comprehensive set of principles to consider when taking still or moving images as part of data collection. Canterbury Christchurch University (2008) have developed an advisory note on ethical issues surrounding the recording and use of visual images of research participants which highlights the key points to consider.

| Tool | Comments/how to use | Advantages | Disadvantages | Recording |
|---|---|---|---|---|
| VOTING | There are many ways for participants to vote:<br>• show of hands,<br>• moving to different parts of room,<br>• putting sticky dots onto items (pictures or statements)<br>• thumbs up/thumbs down (participants show thumbs up, sideways or down to indicate current level of understanding/ agreement with a statement)<br><br>Make sure the choices are unambiguous: draft them in advance or use statements which have been developed by the participants during the discussion. | Snapshot of individual opinion (but doesn't capture justification for choices).<br><br>You can use proportional representation by giving participants two or three votes.<br><br>You can do a vote before and after an intervention to capture changes in opinion. | If the voting is public (where participants can see each others' choices) participants might be swayed by what their friends do. To reduce this it can be better to conduct a vote once people have had the opportunity to discuss issues. Or get participants to close their eyes before voting.<br><br>If you ask participants to vote before a discussion they may not have an opinion so will find it difficult to answer, have an abstain/don't know option. | Take photographs and write up afterwards.<br><br>Record a tally of votes for each statement/choice. |
| RANKING | There are many ways for participants to rank:<br>• Statements/pictures in a line between two extremes<br><br>DIAMOND 9: GIVE 9 STATEMENTS, PRIORITISE KEY FACTORS. THE MOST IMPORTANT FACTORS ARE PLACED TOWARDS THE TOP OF THE "DIAMOND 9". THE LEAST IMPORTANT FACTORS | Participants have to work together to develop the ranking so they expose/develop their thoughts in the process.<br><br>In Diamond 9/statements in a line a concrete artifact is produced which can be kept (however, time needs to be taken beforehand to prepare the statements – one set per group) | The group might not be able to reach consensus. If this happens – acknowledge it and record it.<br><br>Watch out for dominant characters taking-over. You might need to facilitate the exercise to ensure everyone has their say.<br><br>Justification is missing in final record. You might want to find a way of capturing some of the justification eg. through participant observation/ annotation of the final 'artifact'. | Take photos and write up afterwards.<br><br>Glue the 'diamond 9' or ranked list onto one sheet of paper. (See page 10 for diamond 9 example) |

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|---|---|---|---|---|
| | ARE PLACED TOWARDS THE BOTTOM. (SEE EXAMPLES<br>• Example 1)<br>• Standing/sitting in a line<br>• Facilitator moves items in response to the participants' viewpoints called out | | | |
| MIND MAP | Mind maps allow participants to visualise their current understanding of an issue or topic.<br><br>You can use mind maps to capture change by getting participants to create their map at the beginning and then amending it after the intervention (use different coloured pens so you can see the change).<br><br>A mind map is also useful as a talking tool. Participants create a mind map which they then talk through with you and you can ask questions.<br><br>There are many online mind-mapping tools, such as https://www.text2mindmap.com/ | Many children/young people are used to creating mind maps, it is a tool often used in school.<br><br>A mix of pictures and words can be used, it is non-linear and so captures a wide range of ideas/thoughts.<br><br>You can see content, links, depth, language etc and if done pre- and post-intervention you can see how the intervention has changed these aspects.<br><br>Common themes shared amongst mind maps may be seen quickly when compared. | It might be a little like school work so be off-putting.<br><br>Creates a lot of data which needs time consuming analysis.<br><br>Not everyone thinks in this manner so can be hard for some people.<br><br>It can hard to translate the artifact into solid evaluation data. | Collect the mind maps and conduct analysis afterwards.<br><br>https://www.text2mindmap.com/ allows files to be saved, printed and downloaded.<br><br>Can be used as a starting point for an interview (see separate section) by starting with the participant's perspective. The interview should be recorded, transcribed and analysed using standard qualitative analysis tools. |
| GRAFFITI WALL | Participants are given a space on which they can draw or write their thoughts. These work well in spaces and events where people are passing through rather than in a formal setting.<br><br>Variety of mark-making tools could be provided. | Appealing to people who like to draw or comment. Is a novel way of canvassing opinion – doing something 'a bit naughty'.<br><br>Can act as an advert for your project, if displayed in a public place (take care to check content | Takes time and assumes that people can express themselves creatively.<br><br>Can generate quite a lot of noise.<br><br>Very hard to analyse. | Take a picture(s) and analyse afterwards.<br><br>Complete analysis on the artifact itself – ie, underline/ colour code key words/ themes. |

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| | | however!) | | |
| PICTURES | Participants can draw or create an image to represent their viewpoint.<br><br>You can offer a partially completed image which they finish eg people with blank faces and thought bubbles | Works well for people who prefer to express themselves in this way.<br><br>Offers an alternative to talking/writing. | Can be time consuming with people taking more time on the quality of the creation rather than what it's trying to say.<br><br>Not everyone can create in this way. | The image – unlikely that you'll be able to analyse the pictures unless you've given some clear guidance for creating the image. |
| PHOTOS | Participants are given a camera and asked to record images. You can give clear instructions on what they should be taking images of (eg 'places where you...' 'interesting thing we did today') or keep it broader.<br><br>You could ask one person in a group to be the photographer. Others in the group can ask for images to be captured or they can be a 'photojournalist'. | Easy and cheap to do – most people can use a digital camera.<br><br>Produces images which illustrate events when reporting/ writing up case studies.<br><br>Can display images during the event. | Participants might want to use their own camera, so you won't get image.<br><br>Lots of images may be taken, including random ones!<br><br>Consider issues of privacy/ consent. Schools may have a policy on taking/sharing pictures of children – this should be checked if working with schools.<br><br>Image analysis is a specialist skill. | The images are captured but you might also want to find out why the images were taken or selected. You'll need to talk with the participants and record/write down what they say.<br><br>You'll need to find a way of prioritising the images. You might get each team to choose one or two images that really represent their experiences. |
| IN AND OUT THINKING<br>See Example 2 | Create a picture of a person with a thought bubble and speech bubble.<br><br>Participants record what they'd say and what they're really thinking.<br><br>Can be done individually or as a group. | Acknowledges that what you say and what you think might differ.<br><br>Participants find it fun to complete.<br><br>Is a 'safe' way of expressing what participants felt about an event, rather than simply asking for an oral response. Can be anonymous. | The group might not reach consensus; if this happens then allow two bubbles/statements.<br><br>Only captures the conclusion not the process of reaching them.<br><br>Can't get respondent to explain meaning if unclear. | Collect and type up afterwards.<br><br>See page 11 for examples of images that can be used for this task. |
| QUESTIONNAIRES | Paper based or online (ie: LimeSurvey or SurveyMonkey platforms.)<br><br>Conducted at the time or after an | Allows for mass collection of data where trends and correlations can be identified. | Participants may not enjoy completing them. Low response rate if asked to complete afterwards. | Online- no data entry by researcher. Analysis can be conducted using standard statistical analysis. Thematic |

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| | intervention.<br><br>Can be closed (eg multiple choice or Likert Scale responses) or open, or a mix of both.<br><br>Care should be taken in the preparing of questions – think about purpose. | Statistical analysis can be reported.<br><br>If open-ended questions are used citations can be generated to use in reports. | If they are closed then they don't capture opinion if they are open they take a long time to complete.<br><br>If completing during an event can end the event on a low point. | analysis can be used for open responses<br><br>Paper-based- need to enter the data into a spreadsheet which can be time consuming and error-prone. |
| INTERVIEWS | One-to-one conversations with participants.<br><br>It is also possible to do group interviews but these are less useful.<br><br>Interviews can be structured, semi-structured or unstructured. Structured interviews limit response but allow for easy comparison between participants.<br><br>Care should be taken in the preparing of questions – think about purpose. | Rich and deep expressions of opinion.<br><br>Hear the participants own words which can be convincing when cited in a report.<br><br>Can be done over the phone after an event, or recording during an activity/event.<br><br>Can be made part of the activity/event. | Time consuming to arrange, conduct and analyse.<br><br>Participants may be reluctant to express their opinion if you've run the event. May not have an opinion they feel able to share.<br><br>Representativeness of the opinion.<br><br>Consent.<br><br>Interviewing is a skill and takes time to develop. | Audio-record the conversation, transcribe and analyse afterwards. |
| FOCUS GROUPS | Small groups of participants who are brought together to explore an issue.<br><br>Need to facilitate the discussion without leading it.<br><br>Focus groups are different to group interviews: you are looking for agreement and disagreement and the thought processes behind the opinions. | Rich and deep data with justification.<br><br>Can be used at the beginning of project to get a rich understanding of where people are with a concept or issue which you can use to inform the development of an activity or reassess after the intervention. | Difficult and time consuming to organise, run and analyse.<br><br>Facilitation is a skill (you can use some of the other activities in this list).<br><br>Representation of opinion.<br><br>Consent. | Use an audio-recorder, transcribe and analyse using standard qualitative research techniques.<br><br>It can be hard to ensure that people don't talk over each other: if they do this the recorder will not capture it all. |

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| POSTCARD HOME | Ask participants to write a postcard to themselves. You then post it back to them a week or two after the event.<br><br>You might want to keep it broad or you can use it to find out what people think they'll do as a result of the activity ('send yourself a postcard reminding you of what you said you'd do when you get back home/to the office/to school') | You can read/analyse the postcards before you send them home.<br><br>They can be completed individually so they allow a more personal reflection.<br><br>They act as a reminder so might strengthen the effectiveness of your intervention. | Cost for postage (could change to 'email home').<br><br>Participants will know you'll read them so might write what they think you want to hear, or write something 'funny'. | Photocopy, transcribe and analyse using standard qualitative techniques. |
| CONCEPT CARTOONS<br>www.conceptcartoons.com | These are one-image cartoons showing a situation or phenomenon. The characters are expressing different opinions about what they think is happening.<br><br>Are designed to intrigue, to provoke discussion and to stimulate thinking.<br><br>You can present the cartoons to groups by printing out/displaying on a screen. Participants discuss which statement they agree with - mark on the cartoon or vote (see voting section). There may be a blank speech box were participants can add their own thoughts. | Professionally developed and produced cartoons which can be used in a variety of ways. They are tried and tested.<br><br>One of the answers is 'correct' so you can use pre- and post-intervention to assess progress.<br><br>It is possible to make ones for your discipline/concept but this takes time and an illustrator. | You need to buy them (are trademarked).<br><br>They have been developed only for Maths, English and Science.<br><br>May not have a single "right answer"<br><br>Doesn't capture any discussion/dialogue before vote. | Collect the cartoons. Take a picture of the vote/ record number of responses.<br><br>Write up afterwards. |
| PARTICIPANT OBSERVATION | A person is dedicated to watching and recording the event or activity.<br><br>They might have specific things they are looking for eg. enjoyment behaviours, visitor flow, type/number of questions asked.<br><br>They can be passive –sit in the room but | You have a separate pair of eyes to watch and record while you facilitate.<br><br>The observer can be asked to look for specific things or a more general overview.<br><br>They can capture data you as | Participants can find it off-putting to have an observer.<br><br>They can react to the observer/change their behavior.<br><br>Difficult to capture all the data. | Observers sit in the environment and record on paper. There might be table which they complete eg. number of people in an exhibition every 30 mins or number/type of questions asked. |

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| | don't interact with people, or they can follow a group of people (called an accompanied visit).<br><br>You'll need to work with observer to ensure they know to look for and record. | facilitator can't.<br><br>They can look for behaviours and interactions.<br><br>It can be a participant (someone in the group you are delivering to) or a colleague who may or may not be associated with the event | | Or open field notes could be generated.<br><br>Field notes should be shared with event organiser promptly eg. a short discussion.<br><br>Notes can be typed up for further analysis. |
| PARTICIPANT-LED PLENARY | At the end of the session ask a small group of participants to explain the session objectives and intended outcomes of the session/activity.<br><br>Ask remaining participants to briefly discuss in groups whether they agree with the summary given by the group.<br><br>Ask others to offer additional and complementary points. | Gives space for participants to reflect on and explain the objectives and outcomes of the session.<br><br>Is a way for the facilitator to see if the objectives they set for the activity have been recognised as well as achieved.<br><br>Develops as other participants add to the discussion.<br><br>May lead to a concise summary of the activity which can be recorded/act as a 'podcast'. | Assumes objectives and outcomes were apparent.<br><br>May say what they think you as facilitator want to hear (consider leaving the room and getting participants to produce it without you there.)<br><br>Time needs to be given to this activity, it will not work if only lasts 2 minutes. | Film (see film section) – can be released as a podcast.<br><br>Transcribe and use standard qualitative analysis techniques. |
| FILM | There are many ways to use videos to help evaluation:<br>• A video camera can be set up in the corner of the room and a session/activity videoed.<br>• Interviews and focus groups could be filmed (see separate sections)<br>• 'Diary room' – participants | Multisensory representation of activity/event. If edited a high quality product may result.<br><br>Can be done during or after event (issue with equipment loan).<br><br>Can be uploaded to the internet with ease (more people are | Consider issues of privacy/ consent.<br><br>Time-consuming to transcribe/ edit/pick out key parts of video that are useful for evaluative purposes.<br><br>Equipment used to produce high | Transcribe and use standard qualitative analysis techniques.<br><br>Edit/ create a compilation video of the activity/ event |

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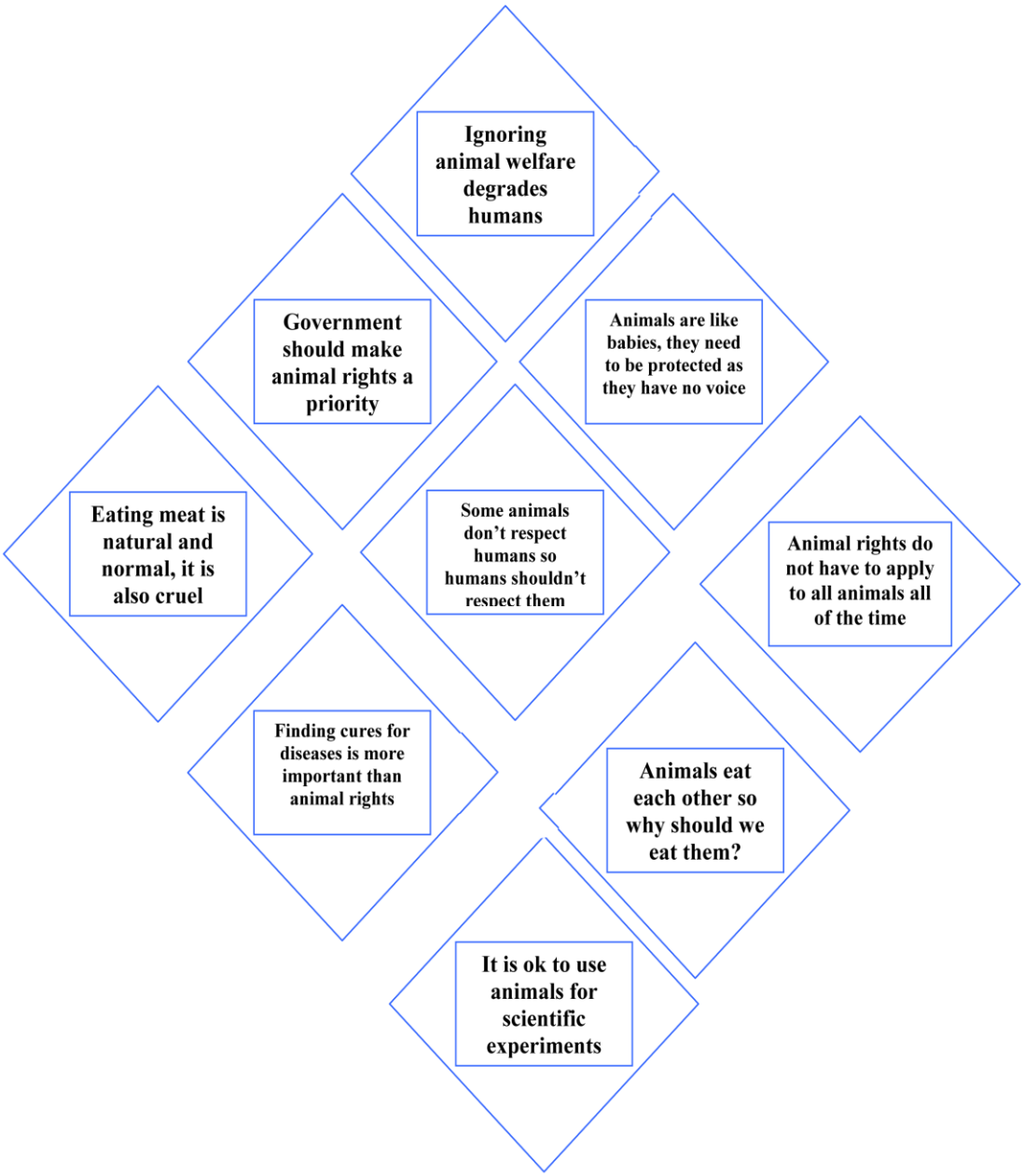
|---|---|---|---|---|
| | record thoughts on event/activity in a private space.<br>• Participants use video to document ideas/activities, to record issues related to the activity/concept that they see outside of the activity- in their environment and community. | developing these skills)<br><br>Different peoples' 'diary entries'/video logs can be analysed for key themes. | quality videos may be expensive.<br><br>Video footage/sound recording may be of poor quality and not do the activity justice | |
| REFLECTIVE LOG | There are many tools for this, but it essentially relies on you looking back at the activities and critically considering them from multiple viewpoints. You can use a structured log (see Example 4) or you can simple jot down some notes and thoughts.<br><br>You can do it alone or with others. | Easy to do – requires only a little time and discipline<br><br>Is a way for the practitioner to reflect on/consider the event from their own perspective. | Offers only a single perspective. Open to bias as you may be easy…or hard…on yourself! When you involve others in the discussion of your practice they may mediate their viewpoint.<br><br>Needs to be completed with other activities | Record, write, photograph, video diary – whatever works for you. You might consider annotating the notes you made before the activity (eg lesson plans) so you remember what worked / what you'd change when you come to it again. |
| SENTENCE STARTERS<br>See Example 3 | Give incomplete sentences for the participants to complete.<br><br>The sentence starters can be written, and participants asked to respond in writing, or they can form part of a focus group discussion point or interview schedule.<br><br>Don't go beyond 5 sentence starters as the task may become onerous, and less quality responses given. | Easy to do.<br><br>All participants are asked to comment on the same thing so aids analysis.<br><br>Can focus the sentence starters on what you are evaluating/ what you are seeking data on. | Template/sentence starters need to be prepared in advance.<br><br>If using the written method it is another tool based on writing. | Copy the forms/responses for your own usual qualitative analysis.<br><br>Let participants take the original forms away with them as a reminder of the event/learning. |

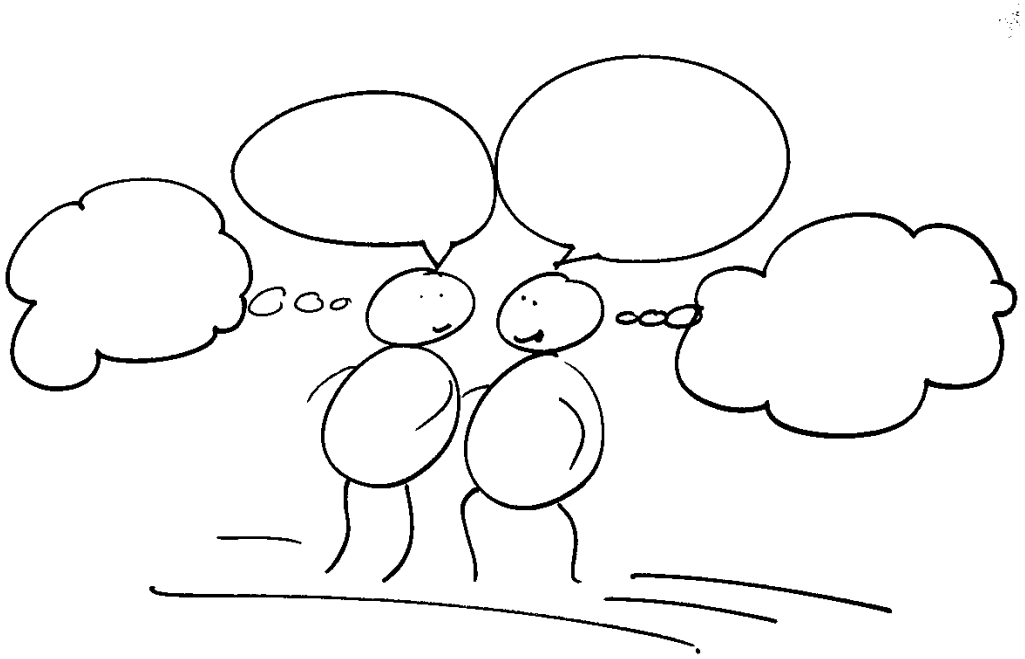
# EXAMPLES

**EXAMPLE 1** DIAMOND 9

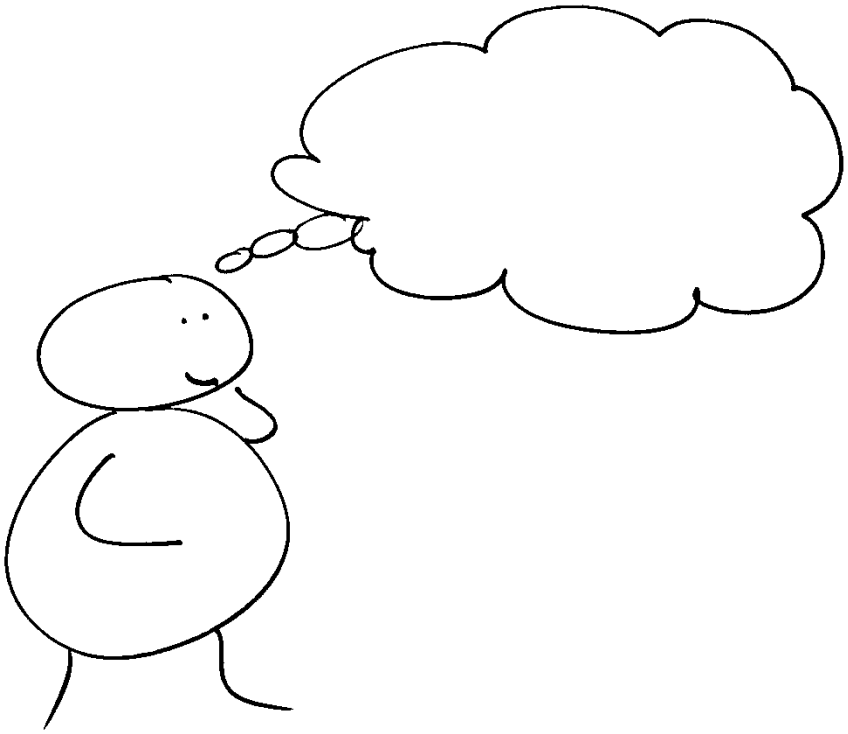
Participants in a group of 4 used a diamond-nine grid to sort a number of statements about the rights of animals, based on their own opinions. The nearer to the top, the more strongly they agreed with the statement. They justified the positioning of cards in a follow-up discussion.



**EXAMPLE 2** IN AND OUT THINKING



The image above could be used after an activity/session. Ask participants 'what will you say about this session when you have left'. Then 'What will you be thinking about the session when you have left'. Questions can also include 'What have I learnt?' or 'What do I think about x?'



This image can be used to capture what the facilitator of the event may be thinking. It can be done by participants, or the facilitator themselves as a self-evaluation.

**EXAMPLE 3 SENTENCE STARTERS**

| | |
|---|---|
| I learnt…<br><br>I liked the way the researcher….<br><br>When next teaching this topic I will try…<br><br>The session could have been improved by… | I learnt…<br><br>I liked the way the researcher….<br><br>When next teaching this topic I will try…<br><br>The session could have been improved by… |
| I learnt…<br><br>I liked the way the researcher….<br><br>When next teaching this topic I will try…<br><br>The session could have been improved by… | I learnt…<br><br>I liked the way the researcher….<br><br>When next teaching this topic I will try…<br><br>The session could have been improved by… |

This sentence starter activity was developed for school teachers involved in the University of Exeter's SUPI project. It was designed to measure success of/feed into two of our impact goals – i/ impact on teachers' capacity to bring contemporary research into the classroom, and ii/ impact on ECRs' skills in communicating research to young people.

**EXAMPLE 4** SELF-EVALUATION: REFLECTIVE LOG

The main focus of this booklet has been on how we can access and harness participant voice in the evaluations of activities and events. However, facilitators themselves can also act as a great source of evaluation data. Many of the tools above can be used by the facilitator as a reflective practitioner, someone who seeks to improve their own practice. As part of the SUPI project, the University of Exeter team developed a reflective log for the Early Career Researchers who took part in school-based work to reflect on their practice after each engagement. We include it here with adaptations to suit anyone facilitating public engagement activities.

Each time you lead a public engagement event you could use a variety of the questions listed below to evaluate/reflect on your experiences. Do not feel that you have to answer each question, rather, reflect on some that are pertinent to you. Perhaps look at a different section after each session?

You could reflect on your THOUGHTS AND FEELINGS about the event. Or you could EVALUATE the session, using your own thoughts, but supplementing it with the views of others. Or you could try to draw up an ACTION PLAN to make your next session even better.

| **What?** | **Description** |
|---|---|
| …happened? … did I see/ do?...was my reaction?...did other people do? | Where was I, who else was there, why was I there, what was I doing, what happened?<br>Provide a clear description of the teaching activity(ies) that you led. *At this stage resist the temptation to make judgements or to try to draw conclusions: simply describe.* |
| **So what?** | **Thoughts And Feelings** |
| How did I feel at the time?<br>Do I still feel the same? | How was I feeling at the beginning? What was I thinking about?<br>What did other people's actions make me think / feel? How did I feel about the outcome? What do I think about it now?<br>What were your initial thoughts and feelings about the experience of teaching?<br>*Again don't try to analyse what went on yet.* |
| **So what?** | **Evaluation** |
| What where the effects of what I did (or did not do)? | What was good about the experience for me, the participants, others?<br>What was bad about the experience for me, the participants, for others?<br>What went well and what could be improved?<br>*At this stage you start to make value judgements.* |
| **It's also useful at this stage to draw on evidence other than your own thoughts and feelings if possible. What did the participants think of the session? If you were observed by a peer or mentor, what were their views?** | |
| **So what?** | **Analysis** |
| What have I noticed about my practice?<br>What have others noted about my practice? | What did I do well / not so well? What did others do well? Did it go as expected? Why / why not?<br>What sense can you make of what happened? How does your experience relate to that of others? |
| **At this stage it is useful to draw on the literature and research relating to learning and teaching. What theory/research helps me understand the experience?** | |

| | **Conclusions (General)** |
|---|---|
| | What can be concluded (if anything) in a general sense from your experiences of teaching and the analysis you have just undertaken? |
| **Now what?** | **Conclusions (Specific)** |
| What are the implications of what I have described and analysed– for me and others? | What can be concluded about your own specific, unique and personal way of teaching? What are the key things I have learned from this incident - about me, my performance, others and their performance? Could I have done anything differently? How might you change your future practice? |
| **Now what?** | **Action plan** |
| What information / skills would I need to cope with similar experiences?<br>What help would I need to acquire these? What is the main learning from this experience and reflection?<br>How can I modify my practice?<br>What if I do nothing? | What would I do in a similar situation in the future? What aspects of my knowledge / skills could I develop? How will I do this?<br>What goals can I set myself for the future? What outcomes / competencies do I need to focus on now? |

(Based on Driscoll, 2000; Driscoll & Teh, 2001; Gibbs, 1988)

## FURTHER READING:

BERA (2011) *Ethical guidelines for educational research*
http://www.bera.ac.uk/wp-content/uploads/2014/02/BERA-Ethical-Guidelines-2011.pdf

BSA (2006) *Statement of ethical practice for the British Sociological Association – Visual Sociology group*
http://www.visualsociology.org.uk/BSA_VS_ethical_statement.pdf

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# AUTHOR BIOGRAPHIES

Helen Featherstone, PhD

Helen has extensive experience of evaluating public engagement activities, preferring a mixed methods approach to evaluation. Her research and practice interests lie in the people involved in public engagement with research: the public participants, the researchers, the partner organisations… For three years (2009-20012) Helen was Chair of the Visitor Studies Group which promotes and supports an audience-centred approach to cultural activities in museums, galleries and other visitor attractions. See visitors.org.uk for more information. Helen is keen to share experiences of evaluation and regularly delivers workshops for public engagement practitioners.

Helen is currently Head of Public Engagement at the University of Bath. Prior to this she held a similar role at the University of Exeter. In these roles she supports and enables researchers to involve the public with their research.

Alison Black, PhD

Alison is project manager of the University of Exeter's SUPI project which aims to communicate university level research to enhance the school curriculum and to raise aspirations of young people from diverse backgrounds, as well as to facilitate the career development of Early Career Researchers. This project involves input from subject experts, education experts, schools and ECRs. Alison helps manage and facilitate the project, and is responsible for developing its evaluation strategy.

Alison worked as a teacher in primary and secondary schools prior to commencing her post-graduate studies, and works as a lecturer and a research associate at the University of Exeter and Plymouth University. A range of her research projects have involved creative evaluations and innovative ways of accessing participant voice.