We can't read minds... but we can ask what visitors think and study their behaviours. This guide explains how to use evaluation to create really engaging interpretation. It's not rocket science: everyone can evaluate as long as you are open, willing to talk to people and follow the principles outlined in these pages.
Thanks to Emma Pegram, evaluation consultant, Morris Hargreaves McIntyre, and all the contributing National Trust property teams, advisors and consultants.
Know what works

Introducing a robust evaluation framework to inform and measure your interpretation.

Evaluation is a way of listening to our visitors. It’s about being curious. What are they interested in? What techniques and content will they respond to? How can we achieve our vision in a way that resonates (this is not a matter of simply doing what we’re told)? Through evaluation we can keep testing and honing our approach, developing experiences in conversation with our audiences, not in isolation from them. It is key to understanding how we can really move, teach and inspire people. It gives us the confidence to be bold.

Whether you want to hold a single focus group or track the best visitor routes around your site, the process and methods described in this guide explain how to conduct (or commission) your own evaluations with rigor and focus. It is accompanied by the Regional Insight Handbook, which explains how to use the data gathered by the Audience Insight team and how to brief agencies.
**Why evaluate?**

Evaluation is usually associated with measuring results. In fact, it’s useful at all stages of your work.

**To develop relationships with visitors.**

The very process of asking people for their views involves them, creating a stronger connection with the story and our cause.

**To test ideas and interpretative techniques.**

Before you commit to a plan of action, put your ideas to the test. Do people ‘get it’ or is there any confusion? Are any practical issues raised? Or ideas proposed to strengthen the approach?

**To iron out any glitches or barriers to engagement.**

You may have recently launched something, or you may just have a hunch that an aspect of your interpretation could be more effective. Where are the barriers? Do you need to rethink anything? What tweaks would make a difference?

**To build knowledge within the team.**

The more evaluation you do, the more you’ll develop an intuitive understanding of what works – useful for all future projects.

**To decide how to focus your interpretation.**

Find out what interests your target audiences – what resonates, what’s relevant, what methods will they respond to? What ideas come up that we could build on?

**To demonstrate outcomes to funders, partners and peers.**

How much did people engage on an emotional level? What evidence do you need for funders and partners to prove their investment has been worthwhile? What tips could you pass on to peers embarking on similar projects?

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Getting started

Every evaluation process should follow five basic steps.

1. **Purpose.** What do you need to find out from visitors? Write evaluation aims and objectives that will help you deliver your interpretation goals. (See page 6).

2. **Plan.** Design evaluation methods that fit your objectives. Be realistic: what will you have time and resources to do? When do you need feedback so that you can act on it? (See page 10).

3. **Collect evidence.** Gather data from your sample audience. Will you do the research in-house or do you need to bring in specialist external support? (See pages 16-30).

4. **Understand.** Understand what the data means. What information does it give you? What can you learn? (See pages 32-34).

5. **Learn and share.** The most important bit: use the results! Summarise your findings, share with your team and others across the Trust and agree the lessons learned. If you need to introduce changes, repeat the evaluation cycle. (See pages 36-37).
Defining your purpose

Base your evaluation objectives on the learning outcomes you define.

Use the Arts Council England’s ‘Generic Learning Outcomes’ to structure the desired outcomes of your interpretation:

- **Knowledge and understanding:** knowledge about something, learning facts, making sense of something, deepening understanding, making links or relationships between things.

- **Skills:** knowing how to do something new, intellectual skills, information management skills, social skills, communication skills, physical skills.

- **Enjoyment, inspiration and creativity:** fun, inspiration, innovative thoughts, creativity, exploration, experimentation, making, surprise.

- **Attitudes and values:** feelings, perceptions, opinions or attitudes (towards ourselves, other people, organisations or an experience), tolerance, empathy, motivation.

- **Action, behaviour and progression:** influencing actual, intended, reported or observed actions; inspiring a change in the way people manage their lives.

Interpretation aims and objectives

Describe the purpose of the interpretation (write these from the National Trust’s perspective). These will directly support your project aims and objectives.

Learning outcomes

Define your learning outcomes. What do you want your visitors to take away from an experience? (Write these from the visitor’s perspective, referring to the Arts Council England model).

Evaluation objectives

What do you need to find out to help you achieve your evaluation aims and learning outcomes?

Be clear on definitions: we want to evaluate learning outcomes, not outputs (income generated, website hits, volunteer hours or visitor numbers are all examples of outputs).

Evaluation aims

Why are you doing the evaluation and who is the audience? For example, is it to meet the requirements of your funders or partners? Or to help the project team design a more emotionally engaging experience? Summarise how the evaluation will inform and improve your work.
Case study
The Drawing Room at Speke Hall

How could music be used to subtly evoke a melancholic state of mind?

The team at Speke Hall wanted to conjure the sad story of former resident, Ada Watt, who had mysteriously died alone and far away from her husband and new baby.

When she was alive, the Drawing Room was very much Ada’s domain. How could the team create a setting and atmosphere that would suggest her emotional state? Here’s how the team broke down the outcomes, aims and objectives of the project:

Interpretation aims and objectives
• Increase emotional engagement.
• Redevelop the presentation of the drawing room.
• Increase awareness of the Victorian Watt family story (as distinct from the Tudor story).

Learning outcomes
• Knowledge and understanding: visitors will learn about Ada’s sadness through the room’s presentation and atmosphere.
• Behaviour and progression: visitors will stay longer in the drawing room.
• Attitudes and values: there will be a sensory experience in the room, visitors will feel an emotional connection with Ada’s story.

Evaluation aims
• Understand how we can use music in the drawing room to suggest Ada Watt’s melancholia.

Evaluation objectives
• What emotions do visitors experience in the drawing room without music?
• What kind of music triggers Ada’s melancholic mood?
• Do different audiences respond in different ways?
• What’s the best playback method?
• What’s the impact on adjacent spaces?
• What’s the impact on a visitor’s mood during the rest of their visit?
Deciding when to evaluate

Beginning, middle or end? At what stage of your project will evaluation be useful?

Evaluation can be carried out at different stages of a project: at the beginning (front-end), during (formative), and at the end (summative). You don’t have to evaluate at every stage – just when it’s going to be most helpful.

Do you really need to evaluate?
Before you begin, check whether the research will really be useful to you. For instance:
• Dig out evaluation results from any similar projects – do they already answer your questions?
• Will you actually use the results or are you just ticking a box?
• If you haven’t introduced anything new, it’s unlikely that summative evaluation will be useful.

Why do it?
Evaluate before you embark on planning a project to understand what will make an experience successful and to avoid wasting time and money on projects that don’t meet audience needs.

What we want to know
At this stage, we’re looking to understand visitors’ interest levels, prior knowledge of subject areas and expectations. You can develop and test stories and messages in advance of detailed planning work. You can also pin down the right learning outcomes and interpretive approaches for your project.

Example methods
Focus groups; surveys; observing an existing programme to understand what works and where the barriers lie.

Deeper connections at Calke
The team at Calke Abbey evaluated at the front-end of a project to understand how they could make stronger emotional connections between visitors and the “un-stately home”. Through surveys, they discovered that while people appreciated the abbey’s authentic atmosphere, there was the potential to make a much deeper impression by redeveloping the visitor guides and using “hidden” interpretation and living history approaches.
Why do it?
Test ideas during the development stage to understand where improvements can be made (for instance, how to better meet audience needs and expectations or better achieve learning outcomes).

What we want to know
Work with representatives from your target audience to gauge responses to elements of the proposed interpretation (as mock ups or dry runs) and to test timings, stories and so on. There’s no point in testing at this stage unless you can actually make changes. Factor in time to make adjustments to your approach.

Example methods
Observation; interviews; accompanied visits.

During (formative)

Why do it?
Evaluation at the end of a project is essential when you need to demonstrate the impact of your interpretation, and very helpful when you’ve tried something new and want to learn from the experience. Produce findings and lessons to share with funding partners, colleagues and the wider organisation – this builds enthusiasm and momentum among your team and supports fundraising efforts.

What we want to know
Understand how well you have achieved your interpretation aims and objectives, what learning outcomes have resulted, and the success factors, barriers and areas for improvement. To understand longer-term impact, think about repeating the evaluation in three to six months.

Example methods
Surveys; interviews; and participatory and embedded methods.

After (summative)

The impact of art
In 2015, a Luke Jerram installation – a flotilla of abandoned fishing boats titled Withdrawn – appeared in Leigh Woods, Bristol. The exhibit was part of the ‘Contemporary Art in Heritage and Landscape Settings’ series, commissioned by the ‘Trust New Art’ programme and funded by the Arts Council England. At the end of the project, evaluation was conducted to understand the impact of experiencing art in the woods. Visitors were positive: the juxtaposition of art in unusual surroundings enhanced people’s appreciation of both.
Choosing methods

Choose research methods to support your evaluation aims and objectives. Keep it simple and manageable.

Which methods do I choose?
There are many ways you can gather information from visitors. We look at eight methods (summarised on the next page and explained in detail on pages 16-30). It’s not an exhaustive list and you may be inspired to adapt these methods, create your own, or use a technique you’ve seen elsewhere. Refer back to your evaluation objectives and choose methods that will give you the right kind of information (see pages 8-9).

Be pragmatic as you choose your methods: will you have time to analyse and use the results? And be careful about bombarding visitors with too many questions at any given time. If there’s a lot of information you need to gather, use some methods that don’t impinge on a visitor’s experience at a property (for instance tracking or observation).

A mixed method approach
Different research techniques will appeal to different audiences and also produce different insights. So it’s usually sensible to use a mix.

Evaluation methods are either quantitative or qualitative.

Quantitative methods
Quantitative research produces numerical data that can be converted into statistics, for instance: ‘The number of people who hold a view’ or ‘The number of people who had this kind of experience.’
Methods include:
• closed questions on feedback forms
• voting
• counting behaviours when tracking or observing visitors.

Qualitative methods
Qualitative methods are used to understand the underlying reasons for behaviours, opinions and motivations. It can take more time to collect and analyse qualitative data, but it will often give you a crucial explanation of what lies behind your quantitative findings.

Methods include:
• open-ended questions in interviews and focus groups
• responses expressed creatively, such as drawings or photographs.

First principles
Remember to be inclusive: create materials in large print or audio; hold any sessions at times that are convenient for your target audience; and cater for any specific needs, for instance child care.

Introduction | Planning | Collecting | Ethics | Understanding | Sharing | Resources
The method mix

Use the combination of methods that will best support your objectives.

1. Observation
   - Watch people do the thing you are evaluating.
   - You witness the experience as it unfolds, seeing behaviours, emotions, interactions.
   - You don't know what people are thinking or why they do things.

2. Tracking
   - Note times spent and behaviours in different areas.
   - Helps you understand the current use of a space.
   - Very time consuming unless using digital tracking methods.

3. Questionnaires and surveys
   - Digital or paper, the surveys can vary in length, from a question or two on a postcard to two sides of A4.
   - You can gather responses from large groups quickly and relatively cheaply.
   - Unlikely to result in a representative sample.

4. Interviews and vox pops
   - Interviews are recorded conversations with visitors around key themes. Vox pops are quick interviews, captured on film or audio.
   - Richer descriptions of the experiences of participants, with an understanding of ‘why’.
   - The approach takes time and confidence.

5. Accompanied visits
   - Participate in a visit, behaving as if you are part of the group.
   - Helps you think and feel like a visitor and understand their perspective.
   - Takes time, could influence visitor behaviour – and you may be expected to be their guide.

6. Focus groups
   - Discussion with a group of your target audience, facilitated by the evaluator who has a set of questions to explore.
   - Richer responses, allowing you to explore attitudes, experiences and beliefs.
   - Requires strong and skilled facilitation.

7. Embedded or participatory
   - An activity that invites visitors to express their knowledge, attitudes, emotions or values.
   - Can become a seamless part of an experience. Visitors can see and discuss the results and feel they are being listened to.
   - Requires time and space to develop. Invest in quality presentation.

8. Peer reviews
   - Invite other professionals (internal or external) to evaluate the project.
   - Professional insights and constructive feedback.
   - Time and bias – obviously the views will not be representative of your audiences.

Resources

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- Planning
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- Understanding
- Sharing
- Resources
Asking questions

Most evaluation methods will involve asking a series of carefully structured questions.

Open questions
Open questions can start with ‘How...’ and ‘What...’, or with verbs such as ‘Describe...’ or ‘Explain...’ They ask visitors to think, reflect, to give opinions and feelings. A participant answers in their own words, or they may be asked to express their response in other creative ways, like a photo, drawing or even a story.

Open questions give you rich and descriptive feedback, helping you explore opinions and ideas, even raising issues or themes you hadn’t thought of.

Examples of open questions:
- Front-end evaluation
  - ‘What would you be interested in knowing about x?’
  - ‘What strong feelings do you have about this topic or activity?’
  - ‘What good examples have you seen elsewhere?’
- Formative evaluation
  - ‘Do you know what to do?’
  - ‘What do you think this is about?’
  - ‘What do you dislike about x?’
- Summative evaluation
  - ‘How can we improve it?’
  - ‘Is there anything you don’t understand?’

Be prepared...
It takes longer to answer open questions (survey participants may be reluctant to answer them). During interviews, you’ll need to introduce prompts and follow-up questions to understand what people mean by their answers (don’t assume you know). And it’s more time consuming to analyse responses to open questions.

Tips for writing good questions:
Invest the time in getting your questions right, whatever your research method. Ambiguous or poorly-directed questions will result in useless answers.

Do:
- use short sentences in clear language
- use the future rather than the conditional tense – ‘How will you …’ rather than ‘How would you…’
- test first with colleagues or friends.

Don’t:
- use jargon, abbreviations, double negatives, or be ambiguous
- use leading questions, phrased in a way that suggests the right answer
- ask two questions in one
- use hypothetical questions
- ask visitors to predict future behaviours (focus instead on concrete experiences).
Closed questions

A closed question can be answered in a single word or short phrase. We sometimes give participants a choice of predetermined responses. These could take the form of rating scales, multiple choice questions or yes/no answers.

Closed questions are often used in self-completed questionnaires or in structured interviews, where interviewees may be shown response options on a card.

Usually viewed as faster to complete and easier to analyse, the drawback with closed questions is that, by design, they are restrictive. Visitors won’t have the opportunity to respond in a way you hadn’t anticipated and you’re unlikely to gain any insight into why people have responded in a certain way. If you want to explore motivations, follow a closed question with an open question.

Using ratings scales

A common device used in closed questions is a ratings scale. A statement is followed by a choice of options, usually designed to understand attitudes (for example ‘Strongly agree’ ranging to ‘Strongly disagree’).

Odd or even options?

An odd number of options (for instance 7), gives people the chance to pick the middle ground. An even number will force people to commit to either a positive or a negative response. You can choose either, as long as you are clear you will meet your evaluation objectives. Sometimes you will need to add an option, such as ‘Not applicable’ or ‘Don’t know’.
Defining audiences and sample size

Gather responses from a representative sample of your target audience so that your results are an accurate reflection of their views.

Who are you targeting?
Decide how many responses you’d like to collect from each of your target audiences and how you’ll keep track of responses so you know when you’ve hit your quota.

Deciding sample size
For quantitative research, the higher the number of responses you gather, the more confidence you can have that results are representative. If you want to present information as percentages ('% of visitors would like to see more interpretation on y'), you’ll need at least 100 responses.

If you are gathering qualitative data, you will probably begin to see patterns and themes in responses quite quickly – it’s not usually necessary to talk to large numbers of people (30 could be enough).

Reaching the right audiences
Some of your target audiences will be easy to reach because they’re already visitors or you already know them. For instance, if you need to recruit a panel of teachers or parents, use links with local school groups.

If you want to reach people who don’t currently visit, approach local community groups and ask your local authority about public engagement panels.

Use our standard audience segmentation questions (for example, those used in the VE survey) if you want to categorise your sample by visitor segment.

A representative sample
It’s easy for bias to creep into your research, which could lead to a failure to collect a representative sample of responses. Examples of bias include: an interviewer who just approaches people who look helpful; a questionnaire is only picked up by people who have more time; or evaluation is carried out at a time that’s convenient for you, rather than when you know your target audience will be on site.

Adapting your questions and methods
You may need to adapt the length, language or data gathering method to fit your audience. For instance if you want to understand what children think, the questions you design for adults probably won’t be appropriate. Instead, invite children to draw responses to a question, or choose stickers or photos to express what they prefer or how they feel.

Two ways to avoid bias:
• Approach every third (for example) adult to cross an imaginary line
• Use your knowledge of visitor patterns: what’s the right time of day, week or year to catch your target audience?
Who can do it?

Make sure you’ve got the right skills in your team to carry out the evaluation. Could your volunteer team help? Will you need external help?

What’s the scale of your evaluation? How complicated will it be to analyse data? How quickly do you need the results? Ask these questions to help you decide how to resource your evaluation.

The planning process
Follow the process outlined on page 5 to put your plan together. If you think you need a specialist to help you, get in touch with your visitor experience consultant.

A great job for volunteers?
Some methods of data gathering (for example simple interviews, surveys, observation) could be carried out by a team of your volunteers.

Many volunteers enjoy working on evaluation projects and there’s another advantage to their involvement: it will be much easier to bring volunteers on board with any bold new approaches if they’ve been involved in the original research.

Use experienced hands
Methods such as focus groups and more complex interviews require an experienced hand. Consider appointing a specialist (from within your own consultancy or externally).

Preparation
When data is gathered at a property, it becomes a part of the visitor experience, so make sure the impact is positive, for instance by keeping any questionnaires short and using well-briefed and professional researchers.

External help
If you don’t have the time or skill in-house, you can either:
- contract an external specialist, usually a heritage evaluation consultant or an audience insight agency
- consider setting up a partnership with a local university or college – your project could dovetail nicely with their public engagement work or provide real life projects for students.

Refer to the Regional Insight Handbook or speak to your visitor experience consultant for advice on working with partners and agencies. The central Audience Insight team can suggest external specialists if you need a list.
1 Observation

**What is it?**

Observation is when a researcher watches visitors participate or engage with something and makes notes on their behaviours. You can choose to make visitors aware you are observing them (for example when testing prototypes). Or, you may decide not to tell visitors that they’re being watched (for instance if you want to see how people naturally behave in a space).

**Create a recording sheet**

This might be a list of behaviours to tick off (quantitative data) or be a blank space with notes on what to look out for (qualitative data). Do a trial run to make sure your recording sheet is easy to use.

**Example behaviours**

Here are some examples of behaviours you might be looking out for:

- **What route do they follow through the space or exhibition?**
  - Do they just go with the flow?
  - Where and why do they make decisions?
  - Do you notice any problems navigating the area?
  - What do people do between stopping points?

- **Which things or areas are people drawn to?**
  - What do people look at or glance at?
  - What do people touch?
  - What makes them smile or frown?
  - Do people appear to read the text?
  - Do visitors appear to use a display as it was designed?
  - Are there any barriers to their engagement with something?
  - How long do they spend in a particular place?
  - Are any behaviours repeated?
  - Do people call over others in their party to look at something?

- **How do groups interact?**
  - Who said what to whom?
  - Do you see any marked reactions, for instance laughter or a groan?
  - Do people move around the space separately or together?
  - To what extent do people interact with National Trust staff, volunteers and other visitors:
    - Who, when and why?
    - How? For instance, looked at them, spoke with them...

- **Tips:**
  - Make sure you are consistent (what you record, the way you record it)
  - When you analyse results, look for heavy, medium or light use of different areas or sections of the space, as well as patterns of activity
  - Beware of making assumptions about what’s in a visitor’s head
  - Be prepared for visitors to ask about what you’re up to and answer their questions (you’ll just have to exclude their data from your research).

**Resources**

- Blank paper or a sheet listing the behaviours to look out for (these will be pre-defined); pen and clipboard.
- Put up a sign saying ‘Evaluation is taking place today in x space. This will help us improve our x y and z. If you want to find out more ask a member of staff.’
Through observation, you will get to see how something is experienced by your visitors, without making an impact on their behaviours and emotions. You will be able to see what visitors do; and equally important, what they don’t do. Observation is more accurate than asking people to report what they did, because they are unlikely to remember everything or won’t remember the details that are important to you.

**Benefits**

Through observation, you will get to see how something is experienced by your visitors, without making an impact on their visit. You will witness first-hand their behaviours and emotions.

**Limitations**

The observation method won't give you any insight into people's thoughts or motivations. Combine with other methods, for example interviews at the end of an accompanied visit.

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### Observation at Ickworth

Ickworth's Smoking Room was designed to display paintings to guests. This gallery-style presentation prompted the team to try out picture labels. Volunteers stood in a corner of the room and used this sheet to observe how visitors used object labels versus room sheets and how closely they studied the paintings.
2. Tracking

What is it?

Like observation, tracking is a method of recording the way people behave in a space. Tracking will usually encompass a whole room or property, and records time spent.

Tracking helps you see if visitors use areas in the way you expect them to. It produces data on, for instance, dwell times and the number of times a certain behaviour is observed.

Resources

- Low-tech: a space plan, plus paper, pens, clipboards and a stopwatch.
- High(er)-tech: a tablet; GPS tracker (for outdoors, most regions have one you can borrow); Bluetooth or digital tags can also capture data on who stops where and for how long.

What are you tracking?

The most common form of tracking is to observe visitors (without their knowledge). It enables you to report on dwell times and behaviours, and how these might vary by audience and factors such as time of day and weather.

How do you record observations?

Create a recording sheet that shows the plan of the space (such as the room layout) and list the behaviours you are looking out for, giving space for comments. Use this sheet to record movements (usually one person at a time) as they work their way through a space. Do a trial run to make sure your recording sheet is easy to use.

Sample size

You will need a large sample (50 or more). Smaller samples are useful to give an indication of behaviour patterns.

Anglesey Abbey sky benches

Formative evaluation using GPS tracking

Anglesey Abbey gave visitors GPS trackers to record their routes around the garden. The results highlighted the quiet spots where the target audience could pause and contemplate the sky peacefully, even on busy days.
Developing a coding system
Create a list of behaviours you might expect to see and then give each a coded letter or symbol that you can quickly and easily record onto your map.

Date: 26/3
Observer: EJ
Busy: low/mid/high
Time in: 11:59
Time out: 11:30
M/F: M
Estimated age
<7
7-11
11-14
14-16
16-18
18-24
25-34
35-44
45-54
55-70

Behaviour codes:
G: Glance <5 secs
L: Look >5 secs
R: Read >5 secs
T: Touch
C: Conversation/talk
P: Point
Ph: Photo
M: use mobile phone
S: sit

Comments/Notes
Conversation with man at fireplace about how comfortable the new field and about the mirror (or garden hose). They also looked out of the window together but couldn’t hear conversation.

Pros and cons
Benefits
Tracking gives you a visual map of where visitors go, what they do and how long they spend in each section. It can be a useful starting point, showing you how people currently use a space so you can work out what needs to change. It will help you highlight features that are popular (and conversely, ignored) and spot trends (audience preferences, what happens at different times of day, in different weather conditions). It is simple to carry out and the paper method is very affordable.

Limitations
It can be a time consuming approach unless you’re capturing data digitally. You will need to observe a large number of people (50+) to ensure you’ve got a representative response. The exercise can be demanding.
3. Questionnaires and surveys

What are they?
Surveys contain a series of carefully-structured questions designed to assess how well your evaluation objectives have been met. They can be as short as one or two questions on a postcard, or as long as two sides of A4.

Resources
• Printed: copies of the questionnaire, pens or pencils and a box for completed questionnaires (or details of who to hand it to).
• Digital: provide a screen at the end of an activity or email the questionnaire to participants.
• If you want to create an online survey (and expect more than 100 responses), get in touch with the Audience Insight team who manage the National Trust’s Survey Monkey account. Sample questions are included.

Designing a questionnaire
Before you begin, remember every property can add up to five questions to the National Trust visitor survey. Could you make use of these? If you do need to design a separate questionnaire, here are some tips:

Keep it short
People are more likely to fill in a survey if they can see it’s short. If you can, fit all of your questions on one side of paper. If you can’t, put your most important questions on the front and make it obvious people need to turn over.

Don’t be tempted to squeeze more questions onto a sheet by using a small font size. It will deter some of your audiences. Use 12pt font where you can, as recommended by our brand guidelines.

Explain why
Add a short introduction to explain why you are running the survey and how you’ll be using the results. For instance: ‘We’d appreciate it if you could take five minutes to tell us what you thought about this activity. We’ll be using your feedback to plan future activities.’

Give instructions
Guide people by giving instructions on how to fill in the form correctly, for instance: ‘Tick each box that applies’. Tell people what to do with their completed questionnaire (for instance, point out the survey returns box or where to hand it in).

Don’t collect personal details
Strict laws on data protection mean that it’s best not to ask for personal information, such as contact details. If you think these details are essential, ask the Audience Insight team for advice.

Use standard questions where you can
Use the phrasing from our central surveys (such as the VE survey) for questions on demography (age and so on), motivations and how people heard about an activity. That way, you can compare responses with other properties. You can tweak wording or add response options if relevant to your project or any funding partner.

Structure questions logically
Order questions in a way that will make the most sense to respondents. Make sure one question doesn’t affect a visitor’s response to a subsequent question.

Number your questions
It’s an obvious point, but don’t forget to number your questions – it will make your data input much simpler.

Use open-ended questions sparingly
Respondents often skip open-ended questions because it takes more thought to complete them, so use sparingly. Could you find out the same information through a closed question? If you find you need to ask a lot of open questions, think about whether holding interviews would be a better method (see pages 12 and 22).

Ask the big questions in different ways
It’s a good idea to ask your ‘killer question’ in a number of ways (for example, a closed question followed by an open one).

Say thank you
Finally, don’t forget to say thank you at the end of your survey.
We've one last question if you have time...

**Nostell Priory**

**Before and after survey**

Thank you for taking the time to complete this short survey. Your input helps us to keep improving.

Please complete this page and the next page before you visit the house. If you have already been into a house, even if there’s no tour, we would still like you to take part. In total, there are 20 questions.

When you have completed the first two pages, please hand your completed questionnaire back to a volunteer, or in place the box provided.

**Introduction**

Thank you. Please complete this after your visit. Please complete this before you start your visit.

Please put today’s date here: **Day** **Month** **Year**

**Planning**

Thank you. Please hand your completed questionnaire back to a volunteer, or in place the box provided.

**Collecting**

Please complete this before you visit the house.

**Ethics**

Please complete this after your visit.

**Understanding**

Before

Please complete this before you start your visit.

What are your expectations of your visit to the house today?

Tick only one

- None
- Little
- General
- Good
- Excellent

After

Please complete this after your visit.

Having been on your visit, how would you describe your knowledge of the following now?

Tick all that apply

- The guide book I’ve bought
- Hands on or interactive displays
- The free mini-guide
- Speaking to a room guide
- Printed information sheets in rooms
- The Winn family and their servants
- The architect James Paine
- The architect Robert Adam
- Rococo design
- Neoclassical design
- Nostell’s collection
- The guide book I’ve bought
- Hands on or interactive displays
- The free mini-guide
- Speaking to a room guide
- Printed information sheets in rooms
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- Nostell’s collection

Benefits

Surveys enable you to gather responses from a large group of people relatively quickly and cheaply (printing costs for paper surveys). You can use them for one-off and repeat (or rolling) evaluation exercises.

Limitations

You’ll need to encourage people to complete the surveys – don’t be surprised if forms left on a table top are just ignored.

It’s also unlikely that you’ll collect a representative sample of views this way. You are likely to attract people with strong opinions (positive or negative), or people with time, which may rule out more distracted family audiences. Expect low return rates.

**Pros and cons**

**Before and after survey**

Thank you for taking the time to complete this short survey. Your input helps us to keep improving.

Please complete this page and the next page before you visit the house. If you have already been into a house, even if there’s no tour, we would still like you to take part. In total, there are 20 questions.

When you have completed the first two pages, please hand your completed questionnaire back to a volunteer, or in place the box provided.

Please complete this before you visit the house.

Please complete this after your visit.

**Introduction**

Thank you. Please complete this after your visit. Please complete this before you start your visit.

Please put today’s date here: **Day** **Month** **Year**

**Planning**

Thank you. Please hand your completed questionnaire back to a volunteer, or in place the box provided.

**Collecting**

Please complete this before you visit the house.

**Ethics**

Please complete this after your visit.

**Understanding**

Before

Please complete this before you start your visit.

What are your expectations of your visit to the house today?

Tick only one

- None
- Little
- General
- Good
- Excellent

After

Please complete this after your visit.

Having been on your visit, how would you describe your knowledge of the following now?

Tick all that apply

- The guide book I’ve bought
- Hands on or interactive displays
- The free mini-guide
- Speaking to a room guide
- Printed information sheets in rooms
- The Winn family and their servants
- The architect James Paine
- The architect Robert Adam
- Rococo design
- Neoclassical design
- Nostell’s collection
- The guide book I’ve bought
- Hands on or interactive displays
- The free mini-guide
- Speaking to a room guide
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4. Interviews and vox pops

What are they?

Interviews are conversations with visitors around the themes set by your evaluation objectives. They can be structured (pre-defined questions); semi-structured; or informal, exploring areas you have decided you want to understand.

Vox pops are recordings (film or audio) of people responding to one or two questions. It’s a fun way of capturing an immediate response to an event. Voices can be recorded using video or audio, in person or over the phone.

Set targeted questions

Refer back to your learning outcomes (see page 4) to structure your questions. You can find lots of examples on the Arts Council England website. Typical questions include:

- What did you discover through the experience?
- What was memorable?
- What surprised you?
- How did it make you feel?
- How will the experience affect you?
- What do you think this exhibit is trying to show people?

You can also explore:

- reactions to elements of an experience
- whether anything got in the way of learning and understanding
- reasons for behaviours recorded during observations.

Ask people to participate

Most people are naturally wary when they are approached by a stranger. Put people at ease as you introduce yourself by:

- making sure your staff ID is visible
- explaining who you are and how long (realistically) the interview or vox pop will take
- explaining the purpose of the interview – people relax when they know you’re not trying to sell them something
- asking for the right permissions (see ‘Evaluation ethics’, page 3)
- and remembering that people are perfectly entitled to say no.

Use a quiet (but not isolated) spot

Think about the best place to talk – a place to sit that’s not too noisy. Do you need to be close to the activity? Or can you move to a quiet corner of the café and buy them a drink? Avoid isolated places and make sure a colleague is nearby, just in case you need assistance.

Create a relaxed atmosphere

Visitors are usually happy to chat with friendly staff and volunteers. They’re more likely to give thoughtful and detailed answers if you’ve established a good rapport and are genuinely interested in their responses.

Use consistent prompts and probes

If you are doing structured interviews, it’s useful to agree the wording of prompts to clarify or follow up on each question. For example:

- Question: What surprised you about this activity? Prompt: ‘Was there anything that was new to you?’
- Question: ‘What do you think this exhibit is trying to show people?’ Probe: ‘Tell me more about that…’

This brings more consistency to the way interviews are conducted (important if you are using a team of interviewers).

Record responses

Decide how you will record the interview – notes, voice recording or video? If you decide to take notes, record what people say (not your interpretation).

Stay neutral

The role of an interviewer is to prompt and record, not get into debate. Remember to refrain from offering your own opinions.
Pros and cons

Benefits
• Interviews give a much richer understanding of a participant’s experience. You can explore motivations and attitudes.
• You can select a representative sample (you control who you approach).
• It’s often a positive experience for interviewees and stakeholders.

Limitations
• Interviews take time and this will put off some respondents.
• It takes skill and confidence to interview well.
• Be prepared for refusals (some people find interviews uncomfortable) and expect low return rates.
• Some audiences, such as families with small children, will find it harder to participate. Try approaching them in a play area.

An exhibition on globalisation?
In 2016, the team at Dyrham commissioned research into four concepts for developing the house experience. Research included self-completion surveys and short interviews on site. Questions they asked included:

• What were you hoping to get out of your visit to the house today? Were your expectations fulfilled? If not, why?
• How do you rate the current house experience on a scale of 1 to 5 if 1 is poor and 5 is excellent? What works and what doesn’t work for you?
• Are you aware of any of these historical events/issues in the list (interviewee is shown a list)? What can you say about them? What draws you in?
• Which of the historical events/issues would you like to know more about? Why?

An example introductory script
• ‘Hello, my name is… I am a volunteer at the National Trust. We are carrying out short interviews with visitors to find out what they think of this room. Would you mind helping us? It will only take about ten minutes of your time and we can sit at the bench over there.’

• ‘The information is just for our own use and I won’t be asking for any personal information so it is not used for sales or marketing purposes.’

• ‘I didn’t design the interpretation in this room so please be completely honest with your responses, I won’t be offended. Your responses will help us make improvements/inform future plans.’

• ‘There are no right or wrong answers: we really want to know what you think.’

‘There are no right or wrong answers: we really want to know what you think.’
5. Accompanied visits

What is it?

An accompanied visit is when someone from your team takes part in an experience alongside visitors. Part observation, part informal interview, you get to experience where people go, what they do and which facilities they use, how long they spend in each area, decision points, high and low points, features and frustrations.

Usually, you would join a group for the whole or a part of their visit. To set this up you can either:

• approach a group in advance of their visit (for example a school group, local member association)
• or approach a group at the start of their visit.

Resources

• Record observations using a notebook and property map.
• Dress to blend in.
• Consider an incentive.

Refer to your evaluation objectives to define what you are looking for during the accompanied visit. For instance, you might be looking for feedback on:

• How easy it is for people to orient themselves and find their way around.
• How people react generally to different elements of the experience, their highs and lows.
• What people choose to take part in and skip over or miss.
• The kind of social interaction you observe (who leads, the roles adults and children take, what they talk about).
• Your impression of what people got out of an experience, what inspired them or moved them (refer to all of the Generic Learning Outcomes, listed on page 6).
• Any barriers to their enjoyment, either physical, intellectual or motivational.
• And generally, what people were interested in and why.

Make notes of observations and comments. If it’s not clear why people behave in a certain way, ask the visitors about their decisions and impressions.

Case Study Croome co-creates

Accompanied visits
First, we met with staff from four specialist schools to plan the visits in a way that supported the needs of the children and to make sure all staff, parents and carers were prepared.

Thirty-five of the school children then came to Croome. During their visits, we watched and noted their moments of joy, identifying 12 key sensory opportunities across the parkland.

Next, we asked the children to select an artist to illustrate the map so it would appeal to their view of the world. The teachers made sure every child (most of whom were non-verbal) could signal their choice – through a giggle, a gesture or an eye movement.

The clear favourite was artist William Hanekom, who then came to Croome. During their visits, we watched and noted their moments of joy, identifying 12 key sensory opportunities across the parkland.

Outcomes
We have seen a boost in repeat visits and visitors with additional needs, with over 600 new audience family visits in the five (winter) months since launch.
Here, you will feel the wind blow. There, you will hear the bird song at its best. And this is a great spot to feel the leaves... Sensory maps introduce people to a place using the senses. They are a brilliant stimulus for people with disabilities and a great alternative, mindful guide for all visitors.

Pros and cons

Benefits
• Putting yourself in the shoes of a visitor really helps you understand the visitor’s experience: their movements, decisions, order of activities, interests, how they find out more, what they don’t like.

Limitations
• It takes a lot of time.
• Visitors may treat you as their guide and ask you questions. If they do, refer to maps, panels and other staff to help them find out.
• The presence of the observer could affect visitors’ behaviour.
6. Focus groups

What are they?
During a focus group, representatives from your target audiences will be led in a discussion on topics arising from your evaluation objectives. The session is run by a facilitator, who follows semi-structured questions and key discussion topics.

Recruiting participants
Decide whether you want to target one specific audience segment (for example, young families), or the mix of audience segments who are likely to make up your visitor profile.

It can be hard work signing people up to join a focus group because of the time and effort involved (you’ll probably be asking visitors to come back in an evening or on another day, not during their visit).

A good way to recruit people is through your existing connections – ‘friends’, members associations, community or social groups, local schools. Alternatively, you can hire a market research consultant to recruit participants for you.

Numbers and duration
- The ideal size for a focus group is eight (a maximum is 12) and the ideal duration is 90 minutes.
- Recruit more people than you need: there are sure to be last-minute cancellations.
- Send out reminders of the time, date and venue a day beforehand.

Recording
It’s a good idea to record the discussion even if someone is taking notes. It’s easy to miss key points. If it’s going to be useful for the project team to hear the discussion first hand, consider filming the focus group (if you do this, remember to ask for participants’ permission ahead of time).

Facilitation
It takes two people to run a focus group: one to facilitate and one to take notes and deal with any practical issues.

Use a ‘topic guide’ to lead the discussion. A typical structure is:
- ice-breaker
- housekeeping
- aims of the focus group
- between 12-15 discussion questions.

The role of the facilitator is to lead the conversation and keep things on topic. Use open-ended questions (rather than leading questions, like ‘Do you agree that...’) and remain neutral (don’t express opinions). Ask for clarification rather than assuming you understand what participants mean.

Refreshments and incentives
Provide refreshments during the session and reimburse people for their time and travel expenses (for example, a £50 payment or a voucher).

Resources
You will need:
- A list of questions or key discussion topics
- Stimulus boards, for example, mock ups of displays or images of content to help people visualise plans or to encourage discussion.
- A facilitator and a note taker
- Refreshments
- A venue that’s convenient for participants (focus groups usually take place outside of work hours)
- A fixed incentive (usually around £50 per hour plus travel).
Rainham’s research panels
When Rainham Hall opened to the public in 2015, the team wanted the local community to refer to Rainham as ‘Our big house’. Input from research groups and advisory panels (made up of people from the community) steered the focus and style of the interpretation approach.

Pros and cons

Benefits
• Focus groups give you a rich understanding of people’s views – you can explore attitudes, beliefs and experiences.
• They are good for gathering feedback at the beginning of a project or at the testing phase because the format enables people to bounce around ideas and opinions.
• They take less time than interviewing the same number of people.

Limitations
• Focus groups require careful management: discussions can easily go off topic or over time.
• They won't produce statistical data (you are likely to be using small groups that may not fully represent your target audience).
• They take time to set up.
7. Embedded, participatory

What is it?
Embedded or participatory research methods invite people to respond to interpretation in a way that’s fun or creative.

Resources
- These will vary depending on the design of your activity, but will often involve craft materials.
- Space – activities are preferably an integral part of the visitor journey (rather than placed in a separate room).
- It may be useful to place an evaluator in the area so they can facilitate, take notes, observe or ask follow-up questions.
- You may wish to photograph or video people’s responses.

Make sure your activity has a point: design an exercise that will inform your evaluation objectives and ask specific questions (rather than a general question like, ‘Give us your feedback...’). For instance:

- ‘How could we improve the spring trail?’
- ‘Share your memories of...’
- ‘Give us your opinion by voting...’
- ‘Which object would you like to own and why?’

Could you use the theme of your interpretation as inspiration? By inviting a creative response to your interpretation – through making, drawing or writing in some way – you can get a real insight into how people think, what they know, or as a result of the experience.

- Use a wall
  Invite people to write comments on a board, or add their doodles to a wall, stick up post-it notes, add smiley faces (and sad). A small touch can make the activity feel more creative and relevant. Here are examples from the Wellcome Collection (above) and Allan Bank (left).

- Create
  Pose a question, such as: “Share your memories of...” and ask people to respond by drawing a picture, making a model, writing a poem, taking a picture and sharing it. The picture above shows the comment tree at the Longshaw Estate, with visitor comments on leaves.

- Ask people to vote
  After “Science Uncovered” open evenings at the Natural History Museum, visitors were invited to vote on their response.
Take inspiration from the property
The team at Leith Hill Place invite visitors to give feedback on paper plates inspired by their Wedgwood ceramics (below). At Standen (below left), comments are posted like letters.

Put a label on it!
In Birmingham, people are invited to write and tie their response to a specific object or scene. Some museums in America call these ‘Anarchy tags’.

Use an object
Some of the spice jars at Kew Gardens are left empty for people to write their personal spice stories (above). Comments are invited on bookmarks at the Wellcome Collection (above right).

Pros and cons

Benefits
• Evaluation can become a fun part of the experience rather than an ‘add-on’ at the end.
• People are often interested in other people’s experiences – it can provoke thought and reflection and helps people feel their views are valued.
• The activities can be a good way of capturing the responses from people of all ages and abilities.

Limitations
• Avoid creating what feels like a primary school activity – apply good design and use quality materials.
• Some activities may be time-consuming to complete.
• Responses can be tricky to analyse;
• You won’t attract a representative sample – only visitors motivated to take part in this kind of activity.

Reflect
“What does home mean to you?” is the question in a notebook at Allan Bank (above). You will inspire the best responses from visitors if you ask a specific question. On the left, Nostell’s The Clock Stops exhibition encourages and evidences deep engagement by asking whether or not to restore their important clock.
8. Peer reviews

What are they?
During a peer review, you would typically invite a person or a team who have led a similar project to experience the interpretation as if they were a visitor, and then talk with key staff, volunteers and maybe some visitors.

Resources
Set aside time for your team to plan, host, reflect on and share the findings of the visit.

Invite constructive feedback on your interpretation from professionals with comparable experiences.

Advice for the reviewers
• Be prepared for open and honest feedback.
• Make sure your reviewers are clear about what you would like feedback on, for example:
  - your interpretation and evaluation aims and objectives
  - areas of interest, such as the content, the interpretive approach, the visitor experience, accessibility and emotional engagement
  - what’s successful and where the barriers might be.

Advice for reviewers
When you are reporting back (both in person and in your written report), celebrate what works, identify where improvements can be made, and make recommendations for next steps.

Case Study
Croome co-creates

Our specialist advice network
Kingston Lacy is a house of treasures. How can the team breathe new life into their presentation?

Invite a fresh perspective from a subject-matter specialist.

In 2016, the team at Kingston Lacy embarked on a ten-year investment programme designed to transform the property experience. As they began to form ideas, they called on specialists in collections, conservation, architecture and interpretation to help them develop their vision.

The National Trust’s specialist advice network lists our internal and external ‘go to’ experts. Subjects range from the specific (such as interpreting 17th century paintings and accommodating bats), to the strategic (such as developing the vision for a landscape or approaches to planning the management of a property portfolio).

Through a series of visits, the Kingston Lacy team called on experts to challenge and stretch their thinking. Here are some of the questions they explored together:

• ‘Do the interpretation themes we’re proposing feel right?’
• ‘What BIG questions can we ask that will make the place feel relevant today?’
• ‘Are the interpretation methods we’re considering appropriate and achievable?’
• ‘How else could we use these spaces? What other forms of engagement could work?’
• ‘Who could we partner with to help make things happen?’

The discussions helped the team broaden their ambitions, focus their plans and gave them the confidence to test their ideas.
Evaluation ethics

Here's a summary of the ethical and professional standards we need to follow.

**Personal details**
Keep all responses confidential and anonymous. Avoid collecting personal details (such as names and addresses). If you think these details are essential, ask the Audience Insight team for guidance and refer to the data protection pages on the intranet.

**Permissions**
Ask for written or verbal permission if you plan to:
- take and use a picture of someone (see model release form on the intranet)
- use an attributed quote (we usually use anonymous quotes)
- film or audio record a visitor's responses
- interview a child or vulnerable adult in the visitor's care.

Make sure visitors consent to take part in research knowing:

- **What it's for.** Always explain why you are carrying out the evaluation and how you will use someone's feedback. This could be part of your verbal or written introduction, or be explained on a sign (for example, during observations)

- **How long will it take.** If your evaluation is taking place during someone's visit, be considerate – minimise the disruption.

- **That they can stop at any time.** If a participant wants to stop half way through an evaluation, that's their right. If you want to persuade them to continue, do it with care.

**Children or vulnerable adults**
When interviewing a vulnerable adult or a child, make sure they fully understand the process and you have the consent of their guardian or responsible adult.

**Reporting etiquette**
Don't falsify evidence, 'sensationalise' or distort findings.

**Incentives**
If you're planning to offer an incentive, make sure it's fitting and realistic. The standard rate focus group attendance is around £50 per participant (covering the cost of travel and time).

Never offer incentives that require the respondent to spend any money, such as discount vouchers.

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**Sweet incentives**
Most people are happy with a simple incentive to take part in research, like the promise of a free cup of tea or coffee in the cafe.
Understanding qualitative data

What story does the data tell you? Follow these steps to analyse your research findings.

**Qualitative data**
- **Prepare the data.** This could mean transcribing voice recordings, taking pictures of the things people have made or writing up recorded observations. Give each participant a unique number to keep track of who said what.
- **Read through.** Read all of the responses to get a general sense of what people are saying and the tone of their responses.
- **Identify themes.** Look at responses section by section (or question by question) for a number of the participants. List the underlying themes that emerge.
- **Cluster the themes.** Sort the themes into distinctive categories. Try to keep the number of themes to a minimum by grouping them under umbrella themes. Abbreviate each theme.
- **Sort responses.** Organise the data under the themes you’ve developed. You can do this by cutting and pasting data into columns in Excel, or physically cutting and pasting paper.
- **Look at variance.** Look at whether there are any differences in responses between target groups, for example, adult-only versus family groups. Look for patterns and trends. You may find that new themes emerge.
- **Describe findings.** Explain your findings and the relationships or patterns you have discovered. You can illustrate this using graphs, tables or quotes.
- **Sum up lessons.** Finally, extrapolate what the data means in the context of the evaluation objectives, asking: ‘What did we learn?’

**Avoid bias**

Take care not to overlay a finding that supports your personal opinion – stay neutral and balanced in your analysis and reporting.
Case study Clustered themes

Analysis feedback at Ickworth
A survey at Ickworth asked visitors the following question: ‘What other area would you be interested in hearing about?’

Responses were clustered into four themes (see right). Results showed that visitors wanted to hear more about a range of subjects, but were particularly interested in gardens and stories about people working in the house and on the estate.
Understanding quantitative data

Crunching the numbers produced by quantitative research can be a more straightforward task.

Quantitative data

1. Enter data on a spreadsheet. If you captured responses on paper, the first step is to enter them onto an Excel spreadsheet. (See right for the most efficient way of doing this).

- Look at the detail. Add up the results to create percentages or other statistics to compare responses by audience (for example age groups) and times (for example weekend versus weekday visitors). Do you spot any differences or consistent trends?

- Describe and visualise the results. Create graphs to compare or track results and summarise the findings.

- Sum up the findings. Assess the results in the context of your evaluation objectives. A simple question to ask is: “What are the lessons learned?”

Analysing spreadsheets

a) Give each participant a unique number, with one column per participant.
b) Use each row to list the questions (one option per row). c) Record “2” in the response given by the participant and “0” in the other options. d) Use the software functions to add up responses, find the average score, and so on.
Drawing conclusions

Reflect on the results and discuss your initial conclusions with colleagues. Have you missed anything? Were there any surprises?

Get different perspectives
It’s often useful to talk about your findings with colleagues. Questions to stimulate your discussion could include:

- What were the learning outcomes for visitors? Are they what you hoped for? Were there any unexpected findings?
- Which features seemed to promote the learning outcomes?
- Is any of the data contradictory?
- What are the limits to the findings?
- What recommendations can we make as a result of the findings?

Present the context
It may be important to include contextual information, such as the volume of visitors on the day, the weather, or comparisons with similar properties or the same period in a previous year.

Cause and effect
Don’t assume that an improved result is a direct result of the interpretation you are evaluating. What other factors could have influenced the outcomes? For instance, prior knowledge of a subject, children’s mood or weather.

Case study Nostell goes free flow

Until 2016, visitors had to follow a fixed route through Nostell Priory. It made sure they saw everything, but was it the best way to experience the 18th century mansion?

In 2016 the Nostell Priory team evaluated ‘free flow’ access through the mansion by running two one-week trials. They used surveys and observation sheets to record visitor and volunteer behaviour and compared engagement levels with data collected during fixed route access. Results of the trial showed a slight improvement in the intellectual, emotional and spiritual impact of the experience. The sample sizes were low, so it was hard to trust a 7% increase in people who ‘improved their own knowledge of the place’. But the result that 5.4% more people ‘enjoyed the peace and tranquillity’ was supported by comments that the house was more calm and relaxing, even when visitor numbers were high. The new free flow approach was launched in time for the 2017 season.
Use and share your findings

Use what you’ve learned to improve your interpretation and share your experience with other teams.

*Make time to share*
It’s an obvious thing to say, but evaluation is only worthwhile if you act on your findings and share what you’ve learned. Who else in the organisation could benefit from your experience? How could your findings help us innovate? How can you build lessons about what has and hasn’t worked into all future projects?

*Reporting*
Don’t assume you need to produce a big document – choose a format that fits your aims and audience. Options include:

- **A presentation**
  If you are running evaluation at the front-end of a project you may just need to produce a PowerPoint presentation of the main findings (words and photographs).

- **A discussion**
  If you are testing a prototype exhibit, through observation for example, all you may need is a detailed discussion on how things are working.

- **A picture album**
  If you captured visitors’ emotional responses (for example using drawings) you could take pictures and make a photo album as a record.

- **A report**
  If you need to produce a report, structure it to address the readers’ questions and make sure the argument is logical.

- **Structure**
  The report structure recommended on the next page is most useful for summative evaluation, but the same principles apply whatever stage you evaluate. Make sure your report:

  - **Is easy to read.** Use graphs, short captions, quotes, photographs to illustrate the points you are making. Make your main points in the headlines.

  - **Includes the salient details.** You don’t need to report every detail, just the evidence to support your findings.

  - **Doesn’t hide bad news.** If your results show that aspects of your interpretation didn’t work (or the objectives weren’t met), include the finding as a valuable lesson learned.

*Use it!*
Don’t let your report gather dust. Here are some of the ways teams share their experiences:

- Use email groups, such as VE chat, countryside chat and art chat.
- Give a presentation at the VE conference.
- Enter for an external or internal award, using your evaluation as evidence of your impact on audiences.
- Run a workshop or sharing day for interested teams (for instance an innovation group, regional transformation groups, marketing clusters, local peer organisations).

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**Introduction**
**Planning**
**Collecting**
**Ethics**
**Understanding**
**Sharing**
**Resources**
### Executive Summary
- Evaluation aims.
- A short description of the activity.
- A summary (up to two pages) of the main findings from your evaluation. You can write this up as a narrative, or mirror the structure of the report so that it’s easy to find the detail in the relevant section.

### Unexpected Outcomes
- Were there any unexpected outcomes (positive or negative)?
- What can we learn from these?

### Conclusions
Sum up the key findings, for example:
- strengths and weaknesses
- what worked well and why
- what didn’t work and why
- what difference the project made (for instance, to visitors’ learning or emotional engagement).

### Lessons Learned
- What you would do differently next time and why?
- Key learning points for others.

### Appendices
Include as appropriate:
- details of methods used, such as questionnaires, interview schedule
- additional photographs.

---

**Depth of Engagement in the Smoking Room**

<table>
<thead>
<tr>
<th>Type of Visitors</th>
<th>Percentage</th>
</tr>
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<tbody>
<tr>
<td>Engaged</td>
<td>54%</td>
</tr>
<tr>
<td>Not Engaged</td>
<td>46%</td>
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**Use of Object Labels**

<table>
<thead>
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<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Did not read a label</td>
<td>17%</td>
</tr>
<tr>
<td>Read 1 object label</td>
<td>14%</td>
</tr>
<tr>
<td>Read 2-4 object labels</td>
<td>33%</td>
</tr>
<tr>
<td>Read 5 or more object labels</td>
<td>36%</td>
</tr>
</tbody>
</table>

**Use of Laminates**

<table>
<thead>
<tr>
<th>Use of Laminates</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Did not read laminate</td>
<td>67%</td>
</tr>
<tr>
<td>Read it properly</td>
<td>14%</td>
</tr>
<tr>
<td>Had a quick look</td>
<td>19%</td>
</tr>
</tbody>
</table>

---

**Engagement and Interpretation**

- **Depth of Engagement**
  - **Engagement**
    - Discovery: 44%
    - Exploration: 30%
    - Orientation: 26%
  - **Not Engaged**
    - Discovery: 30%
    - Exploration: 14%
    - Orientation: 56%

- **Use of Object Labels**
  - Did not read a label: 17%
  - Read 1 object label: 14%
  - Read 2-4 object labels: 33%
  - Read 5 or more object labels: 36%

- **Use of Laminates**
  - Did not read laminate: 67%
  - Read it properly: 14%
  - Had a quick look: 19%
Further resources

If you want to delve into more detail, here's a list of useful bodies, articles and guides.

**Professional organisations**

**Evaluation toolkits and guides**
- A guide to evaluating arts education projects, Felicity Woolf (1999)

**Useful articles**

**Learning Outcomes**

**Research and evaluation examples**

**Ethics**
Ethical Guidelines for Educational Research

**National Trust resources**
You can also ask for advice from our Audience Insight team, visitor experience consultants, volunteering and participation consultants and grants and fundraising consultants.
Glossary

A quick guide to the technical terms commonly used in evaluation and interpretation.

Closed questions
Answered in a single word or short phrase, or by selecting multiple choice responses or rating scales.

Open-ended questions
Answered in a participant’s own words.

Evaluation aim
A broad question or statement about your ambition for the project. For example:
• “How can I better connect my visitors to the spirit of my place?”
• “How can visitors emotionally connect with this place?”

Evaluation objectives
Subsets of the evaluation aim, specifying what you need to find out. For example:
• “What do visitors understand by the spirit of this place?”
• “How does this overlap/differ from ours?”
• “What are different aspects of our ‘spirit’ relevant to different audiences?”
• “What themes, stories or objects interest visitors and why?”

Interpretation aim
A statement of intent. What do you want your interpretation to achieve? Written in broad terms and from the Trust’s perspective (what we will do). For example: ‘We will develop a programme to support local people with dementia.’

Interpretation objectives
Goals or steps you need to take to achieve your interpretation aims. Written from the Trust’s perspective (what we will do). For example, ‘We will partner with local care organisations to understand the needs of people with dementia.’

Learning
‘A process of active engagement with experience. It is what people do when they want to make sense of the world. It may involve the development or deepening of skills, knowledge, understanding, values, ideas and feelings. Effective learning leads to change, development and the desire to learn more.’ (Campaign for Learning).

Learning outcomes
The desired impact on participants (such as emotional response, changed attitude, new knowledge). Written from the visitor’s perspective (what they’ll take away). For example, participants will show they have engaged with an aspect of this place.

Front-end evaluation
Testing ideas before you start planning your project to help define it.

Formative evaluation
Testing during the project to help refine it.

Summative evaluation
Explores whether you have achieved your aims, objectives and learning outcomes at the end of your project.

Informal interviews
Conversations with your target audience, based around your research questions.

Structured interviews
Questions are planned out in advance. You might want to stick to the defined questions strictly, or allow the interviewer to use them as a guide (semi-structured).

Qualitative data
Evidence that explains the underlying reasons behind behaviours, motivations and opinions.

Quantitative data
Numerical data that can be converted into statistics or show quantities.