

# QUICKGUIDE TO USING THE EVALUATION TOOLKIT FOR ARTS ORGANISATIONS IN SOMERSET

---

## Introduction

---

Somerset County Council with Sedgemoor District, Mendip District, South Somerset District Councils, Taunton Deane Borough Council and Artlife (Cultural Development Agency for West Somerset) and Arts Council England, South West have commissioned Annabel Jackson Associates to carry out a review of social impact evaluation in the arts, produce a toolkit and carry out case studies of key arts organisations. This document presents a quick guide to our first draft of the evaluation toolkit. The evaluation toolkit is based on earlier evaluation toolkits written for the Arts Council of Northern Ireland in 2004 and the Arts Council of Wales in 2006.

After the evaluation finished, arts organisations in Somerset decided to continue collecting the data for their own collective benefit.

## The content of the Toolkit

---

The toolkit contains:

- A set of principles to frame evaluation in a way that is beneficial to arts organisations (Introduction).
- An explanation of the purpose and benefits of evaluation (Background).
- A set of thought and actions for each stage of a project or programme (Main text).
- Guidance on evaluation methods and tasks (Appendix One).
- Standard questionnaires (Appendix Two).
- Spreadsheets for entering the data from the Activity Form and the Outcome Questionnaire.

This Quickguide covers the essential elements of applying the Evaluation Toolkit.

## Benefits of the Evaluation Toolkit

---

The toolkit has increased the consistency of evaluation work, enabled individual arts organisations to better understand and explain their effects, and also helped the entire sector to make a stronger case in difficult times. The Evaluation Toolkit provides reference material for arts organisations that would like to devise their own questionnaires or evaluation plans.

---

## Setting the scene

---

Please tell users/participants and artists/workshop facilitators that you evaluate your work. Explain evaluation to them in a positive way, emphasising the way information is used for organisational learning. Emphasise that you are evaluating the organisation not them.

Please feed back key facts from evaluation forms to users/participants: this will show them the value of their input. Feedback does not need to be a report or other formal structure: it could be just a paragraph or announcement in a newsletter or website either relating to their comments or your proposed changes to your programme.

---

## NOTES FOR THE ACTIVITY FORM FOR PROJECTS

---

Please complete one form/column per project, whether it is a workshop, course or residency. You might also find it helpful for your own purposes to compile information on your other projects using this form.

The Activity Form applies to all projects, not just education or community arts. You should complete enough Activity Forms to cover all of your participative work. We appreciate that some of you will have a hundred or more projects. Once you have information compiled in this format for all your projects you should be able to use it for your own purposes too.

If your work is more continuous, and is not composed of projects, then you need to think about how to define units of activity: these could be according to time periods (terms), target group (age ranges), areas or partnerships.

The Activity Form should ideally be completed by the person who is running the session, or by any other member or staff or volunteer who is present during the session. The same person could complete the Activity Evaluation Form and any observation forms you are using. It is important that forms are completed during the session when events are fresh, rather than afterwards. You should check the form at the end of the session to ensure that it is complete.

Please complete one form/column of the spreadsheet for each project. Please complete one questionnaire/column on the spreadsheet per project, starting with 1 for the beginning of the financial year, and number them consistently so that we can see that we have information on all the projects you carried out.

Notes on specific questions:

- **Question 3: Partners, if any:** This should include organisations involved in the delivery of the programme, but not funders.
- **Question 4: Is there a possibility we will receive more than one activity form for this project?** (from different partners): this would happen where, for example, Somerset local authorities are funding a touring company and a venue.
- **Question 11: Local authority area(s) where the project was delivered:** This should be the local authority area for the venue(s).
- **Question 12: Post code of target community, if any:** Your project is **targeted** if you specifically tailored your marketing, content and/or delivery to an area or interest group. If your project is not targeted spatially write "na".
- **Question 13/14: Start and end dates for the delivery of the project: Start date** - Exclude planning work. Only include contact with participants. **End date** - Only include contact with participants.
- **Question 15: Total number of sessions:** A **session** is a continuous period of contact of half a day or less. There are three sessions in a day: morning, afternoon and evening.

- 
- **Question 16: Total contact hours per participant:** Only include **contact** with participants. Exclude any homework or practicing.
  - **Question 17: Target number of participants:** This is your reasonable estimate of the number of participants the project should have been able to attract.
  - **Question 18: Actual number of participants:** Please give the total number of people who attended the project **consistently** rather than the average in any given session. Consistently means that the participants should have attended at least half of the total sessions of the project.
  - **Question 19: Any targeting:** Your project is **targeted** if you specifically tailored your marketing, content and/or delivery to an area or interest group. If your project is not targeted tick "I" No targeting.
  - **Question 27: Any methods to support access:**
    - a. **Outreach** - Working in the community, taking programme activity to target participants e.g. to a venue that they already use
    - b. **Group targeting** - Carrying out specific marketing or programming activities or designing delivery to attract a particular cohort within community e.g. minority group, children, socially excluded
    - c. **Childcare** - Providing a staffed crèche or nursery for participants.
    - d. **Affordability** - Deliberately subsidising attendance so as to make a project accessible.
    - e. **Help with transportation** - Picking participants up from their homes or paying for their transportation
    - f. **Publicity available in different languages** - Providing literature in different languages (e.g. Ulster Scots, Irish).
    - g. **Publicity available in different formats** - Providing literature in accessible formats (e.g. Braille, large print, audio cassette and signed video cassette).
    - h. **Accessible venues** – Ensuring the venue complies with legislation.
    - i. **Communication support** - Providing a signer or subtitles.
    - j. **Support worker costs** - Paying for, or organising, a worker who attends with a disabled person to look after their personal or communicational needs.
    - k. **Sensory interaction** - For example touch-tours of exhibitions, behind the scenes touch-talks at theatres, sound beams etc.
    - l. **Audio described** - Description of visuals in performances, films, exhibitions, etc, for visually impaired people.
    - m. **User generated content on website** includes - reviews from audience members, art works and questions to the artists.

Please complete the data on the Excel spreadsheet.

## ACTIVITY FORM FOR PROJECTS

1. Name of the organisation		
2. Name of the project		
3. Partners, if any		
4. Is there a possibility we will receive more than one activity form for this project? (from different partners)	Yes No	
5. Were any volunteers involved in the project?	Yes No	
6. If yes, how many?		
7. Art form(s) of project ( <i>Please tick all that apply</i> )	a. Dance b. Theatre c. Literature d. Music e. Opera/musical theatre	f. Live/inter-disciplinary art g. Visual art h. Film or media i. Other, please specify:
8. Venue(s) for the project ( <i>Please tick all that apply</i> )	a. Theatre b. Concert hall c. Gallery d. Arts centre e. Studio space f. Media centre g. Cinema h. Museum i. Library j. Other cultural venue k. Street/open air/landscape l. College of further or higher education	m. Community centre n. Village hall o. Church hall/religious building p. Youth club/centre q. School r. Nursery/pre-school centre/children's centre s. Leisure centre t. Hospital u. Day care centre v. Residential home w. Hostel x. Prison y. Online z. Other venue, please specify:
9. If school is this:	a. Primary b. Secondary c. First	d. Middle e. Special f. Don't know

10. Post code of venue		
11. Local authority area(s) where the project was delivered	a. Mendip b. Sedgemoor c. South Somerset	d. Taunton Deane e. West Somerset f. Other, please specify:
12. Post code(s) of target community, if any		
13. Start date for the delivery of the project		
14. End date for the delivery of the project		
15. Total number of sessions		
16. Total contact hours per participant (number of hours times number of sessions)		
17. Target number of participants		
18. Actual number of participants		
19. Any targeting	a. Early years ( under 4) b. Children (4-19) c. Older people (50-64) d. The elderly (65+) e. Women f. Men/boys g. People living in an area of multiple deprivation h. Rural groups	i. Ethnic minorities j. Mental health service users k. Offenders/ex-offenders l. Disabled people m. Carers n. Victims o. No targeting p. Other, please specify:
20. Number of participants who are early years (under 4)		
21. Number of participants who are children 4-19		
22. Number of participants who are older people (aged 50-64)		
23. Number of participants who elderly (65+)		

24. Number of participants who are disabled		
25. Number of participants who are from ethnic minorities		
26. Number of participants who are from areas of multiple deprivation		
27. Any methods to support access	<ul style="list-style-type: none"> <li>a. Outreach</li> <li>b. Group targeting</li> <li>c. Childcare</li> <li>d. Affordability</li> <li>e. Help with transportation</li> <li>f. Publicity available in different languages</li> <li>g. Publicity available in different formats</li> <li>h. Accessible venue</li> <li>i. Use of sign language</li> <li>j. Support worker costs</li> <li>k. Sensory interaction</li> <li>l. Audio described</li> <li>m. User generated content on website</li> <li>n. None</li> <li>o. Other, please specify:</li> </ul>	
28. Charge paid by participants	<ul style="list-style-type: none"> <li>a. No charge</li> <li>b. Reduced charge (concession)</li> <li>c. Other subsidised</li> </ul>	<ul style="list-style-type: none"> <li>d. Full charge</li> <li>e. Other, please specify:</li> </ul>
29. Number of participants who gained a qualification		
30. Was there an end product?	<ul style="list-style-type: none"> <li>a. No</li> <li>b. Yes, a performance</li> <li>c. Yes, an exhibition of art work or craft work</li> <li>d. Yes, a film, video or music recording</li> </ul>	<ul style="list-style-type: none"> <li>e. Yes, individual art work e.g. song, poem, picture</li> <li>f. Yes, a publication or CD</li> <li>g. Yes, participants attended a show</li> <li>h. Yes, a website record or archive</li> <li>i. Other, please specify:</li> </ul>
31. If there was a performance or exhibition, please estimate the audience numbers		

THANK YOU!

---

## NOTES FOR THE ACTIVITY FORM FOR PERFORMANCES/ CONCERTS

---

If you are a venue hosting a theatre company then the venue should fill in the Activity Form for Performances/Concerts and the theatre company should fill in the Activity Form for Productions.

Notes on specific questions:

- **Question 4: Partners, if any:** This should include organisations involved in the delivery of the programme, but not funders.
- **Question 12: Any targeting:** Your project is **targeted** if you specifically tailored your marketing, content and/or delivery to an area or interest group.
- **Question 13: Any methods to support access:**
  - a. **Outreach** - Working in the community, taking programme activity to target participants e.g. to a venue that they already use
  - b. **Group targeting** - Carrying out specific marketing or programming activities or designing delivery to attract a particular cohort within community e.g. minority group, children, socially excluded
  - c. **Childcare** - Providing a staffed crèche or nursery for participants.
  - d. **Affordability** - Deliberately subsidising attendance so as to make a project accessible.
  - e. **Help with transportation** - Picking participants up from their homes or paying for their transportation
  - f. **Publicity available in different languages** - Providing literature in different languages.
  - g. **Publicity available in different formats** - Providing literature in accessible formats (e.g. Braille, large print, audio cassette and signed video cassette).
  - h. **Accessible venues** – Ensuring the venue complies with legislation.
  - i. **Language / speech-to-text** - Providing a signer or subtitles.
  - j. **Support worker costs** - Paying for, or organising, a worker who attends with a disabled person to look after their personal or communicational needs.
  - k. **Sensory interaction** - For example touch-tours of exhibitions, behind the scenes touch-talks at theatres etc.
  - l. **Audio described** - Description of visuals in performances, films, exhibitions, etc, for visually impaired people.
  - m. **User generated content on website** includes - reviews from audience members, art works and questions to the artists.

Please complete the data on the Excel spreadsheet.

---

**THE ACTIVITY FORM FOR PERFORMANCES/ CONCERTS/SCREENINGS (ONE FORM PER VENUE)**


---

1. Name of organisation		
2. Name of production		
3. Art form(s) of project ( <i>Please tick all that apply</i> )	a. Dance b. Theatre c. Literature d. Music e. Opera/musical theatre	f. Live/inter-disciplinary art g. Visual art h. Film or media i. Other, please specify:
4. Partners, if any		
5. Is there a possibility we will receive more than one activity form for this production? (from different partners)		
6. Were any volunteers involved in the performance?	a. Yes b. No	
7. If yes, how many?		
8. Where was the venue for the performances?	a. Our home base: main studio/space b. Our home base: other studio/space	c. Other, please specify:
9. Type of venue ( <i>Please tick all that apply</i> )	a. Theatre b. Concert hall c. Gallery d. Arts centre e. Studio space f. Media centre g. Cinema h. Museum i. Library j. Other cultural venue k. Street/open air/landscape l. College of further or higher education	m. Community centre n. Village hall o. Church hall/religious building p. Youth club/centre q. School r. Nursery/pre-school centre/children's centre s. Leisure centre t. Hospital u. Day care centre v. Residential home w. Hostel x. Prison y. Online z. Other venue, please specify:

10. Post code of venue		
11. Local authority area(s) of the venue(s)	a. Mendip b. Sedgemoor c. South Somerset	d. Taunton Deane e. West Somerset f. Other, please specify:
12. Any targeting	a. Early years ( under 4) b. Children (4-19) c. Older people (50-64) d. The elderly (65+) e. Women f. Men/boys g. People living in an area of multiple deprivation h. Rural groups	i. Ethnic minorities j. Mental health service users k. Offenders/ex-offenders l. Disabled people m. Carers n. Victims o. No targeting p. Other, please specify:
13. Any methods to support access	a. Outreach b. Group targeting c. Childcare d. Affordability e. Help with transportation f. Publicity available in different languages g. Publicity available in different formats h. Accessible venue i. Use of sign language j. Support worker costs k. Sensory interaction l. Audio described m. User generated content on website n. None o. Other, please specify:	
14. Date of first performance		
15. Date of last performance		
16. Total number of performances at this venue		
17. Seating capacity		

---

18. Percentage of available tickets sold	
19. Total number of tickets sold	
20. Number of full price tickets sold	
21. Number of discounted or free tickets distributed	
22. Number of concessionary tickets sold	
23. Minimum ticket price	
24. Maximum ticket price	
25. Total audience numbers	

THANK YOU!

---

## NOTES FOR THE ACTIVITY FORM FOR EXHIBITIONS

---

Please complete one questionnaire/column on the spreadsheet per exhibition, starting with 1 for the beginning of the financial year, and number them consistently so that we can see that we have information on all the exhibitions you carried out.

Notes on specific questions:

- **Question 3: Partners, if any:** This should include organisations involved in the delivery of the programme, but not funders.
- **Question 11: Targeting:** Your project is **targeted** if you specifically tailored your marketing, content and/or delivery to an area or interest group. If your project is not targeted choose 'I' none.
- **Question 12: Any methods to support access:**
  - a. **Outreach** - Working in the community, taking programme activity to target participants e.g. to a venue that they already use
  - b. **Group targeting** - Carrying out specific marketing or programming activities or designing delivery to attract a particular cohort within community e.g. minority group, children, socially excluded
  - c. **Childcare** - Providing a staffed crèche or nursery for participants.
  - d. **Affordability** - Deliberately subsidising attendance so as to make a project accessible.
  - e. **Help with transportation** - Picking participants up from their homes or paying for their transportation
  - f. **Publicity available in different languages** - Providing literature in different languages (e.g. Ulster Scots, Irish).
  - g. **Publicity available in different formats** - Providing literature in accessible formats (e.g. braille, large print, audio cassette and signed video cassette).
  - h. **Accessible venues** – Ensuring the venue complies with legislation.
  - i. **Language / speech-to-text** - Providing a signer or subtitles.
  - j. **Support worker costs** - Paying for, or organising, a worker who attends with a disabled person to look after their personal or communicational needs.
  - k. **Sensory interaction** - For example touch-tours of exhibitions, behind the scenes touch-talks at theatres etc.
  - l. **Audio described** - Description of visuals in performances, films, exhibitions, etc, for visually impaired people.
  - m. **User generated content on website** includes - reviews from audience members, art works and questions to the artists.
- **Question 13: Date started:** This is the date the exhibition opened to the public.
- **Question 14: Exhibitions days:** This is the number of days the exhibition was open to the public, not just the difference between the date the exhibition opened and the date it ended.
- **Question 18: Where else touring:** Include touring of part of the exhibition or touring with local adaptations/customisation. Nationally means within England/the UK.

- **Question 21: How visitor numbers are produced:** This question tells us how precise the figures in question 15 are. Please put “estimate” if you have inferred attendance e.g. from taking all people who walk past an exhibition in a foyer.

Please complete the data on the Excel spreadsheet.

---

**ACTIVITY FORM FOR EXHIBITIONS**


---

1. Name of organisation		
2. Name of the exhibition		
3. Partners, if any		
4. Is there a possibility we will receive more than one activity form for this production? (from different partners)		
4. Were any volunteers involved in the performance?	Yes	No
5. If yes, how many?		
6. Where was the venue for the performances?	a. Our home base: main studio/space b. Our home base: other studio/space	c. Other, please specify:
8. Type of venue ( <i>Please tick all that apply</i> )	a. Theatre b. Concert hall c. Gallery d. Arts centre e. Studio space f. Media centre g. Cinema h. Museum i. Library j. Other cultural venue k. Street/open air/landscape l. College of further or higher education	m. Community centre n. Village hall o. Church hall/religious building p. Youth club/centre q. School r. Nursery/pre-school centre/children's centre s. Leisure centre t. Hospital u. Day care centre v. Residential home w. Hostel x. Prison y. Online z. Other venue, please specify:
9. What was the post code of the venue?		

10. Local authority area(s) of the venue(s)	a. Mendip b. Sedgemoor c. South Somerset	d. Taunton Deane e. West Somerset f. Other, please specify:
11. Any targeting	a. Early years ( under 4) b. Children (4-19) c. Older people (50-64) d. The elderly (65+) e. Women f. Men/boys g. People living in an area of multiple deprivation h. Rural groups	i. Ethnic minorities j. Mental health service users k. Offenders/ex-offenders l. Disabled people m. Carers n. Victims o. No targeting p. Other, please specify:
12. Any methods to support access	a. Outreach b. Group targeting c. Childcare d. Affordability e. Help with transportation f. Publicity available in different languages g. Publicity available in different formats h. Accessible venue i. Use of sign language j. Support worker costs k. Sensory interaction l. Audio described m. User generated content on website n. None o. Other, please specify:	
13. Date started		
14. Date ended		
15. Exhibitions days		
16. Charge paid by visitors	a. No charge b. Reduced charge (concession) c. Other subsidised	d. Full charge e. Other

---

17. Origin of performance	a. Own production b. Co-production c. Tour from English company d. Tour from company based outside England
18. Where else touring	a. Regionally b. Nationally c. Internationally d. No touring
19. Number of artists exhibited	
20. Total number of visitors	
21. How visitor numbers are produced	a. Counter b. Estimate c. Sample count

THANK YOU!