Toolkit for streamlining your evaluation planning

Flying Geese
Marketing & Development Consultancy

Introduction

All organisations need to evaluate at some point. It could be a condition of your funding or it could be part of your cycle of learning from your experience and developing good practice.

We know that organisations often know that evaluation is important and want to do it well, but it can feel overwhelming. This toolkit helps you

- Make evaluation more efficient, streamlined and meaningful
- Understand what to evaluate and why
- Understand HOW to evaluate
- Understand what metrics to use

This toolkit will give you top tips and resources to make evaluation easier, start you asking the right questions and have you well on your way to embedding best evaluation practices into your day-to-day.

Step by step guide

- Work your way through completing the information in the tables that follow
- For the stakeholder mapping exercise you might find it helpful to cut out and paste the coloured circles onto your stakeholder map.
- If you don’t know the answers to some of the questions or how to complete the exercises, consider working with a consultant who can help you
- Work with your team, and everyone in your organisation to ensure that everyone is part of the conversation - when it comes to stakeholder mapping and the big questions, you’ll need each other.

Guidance.....

Each of these coloured circles represents a group who are either part of your organisation's stakeholders or, you might prefer to call them audiences.

Stakeholders are individuals and organisations who are actively involved with your organisation or whose interests might be positively or negatively affected as a result of the things that you do. Simply put, stakeholders are any people and organisations who are impacted by what you do or have an impact or level of influence over the work that you do.

Each of these groups will have various and varying levels of importance to your organisation as well as different levels of engagement with you.

There could be other groups which you feel are missing and you could add them here in a circle of their own.

Start with the basics

Guidance.....

This worksheet helps you to drill down into who belongs in each of these stakeholder groups.

The people and organisations that you fill in here will be unique to you.

Add any of the extra groups that you thought were missing on the previous page to the bottom of this table.

Fill the table in by thinking through each group and adding into the table the names of all or examples of the different people or organisations who belong to each of the groups.

How does each of these groups want to hear from you? For example, funders might have particular reporting timescales and templates.

What metrics will they want from you to assess your impact? The media might be interested in human interest stories and dynamic visuals whereas your board might want to see quantitative information collected over a longer period of time which assesses in a measurable way the impact particular things you have done have had on your target audiences.

Stakeholder communications planner

Stakeholder Group	Examples	What is important to them	What metrics do we think they will use	How do they want to hear our story	How often do they want to hear our story
Funders					
Collaborators and partners					
Competitors					
Sector influencers					
Board and governance					
Policy makers					
Public audiences					
The media					
…					

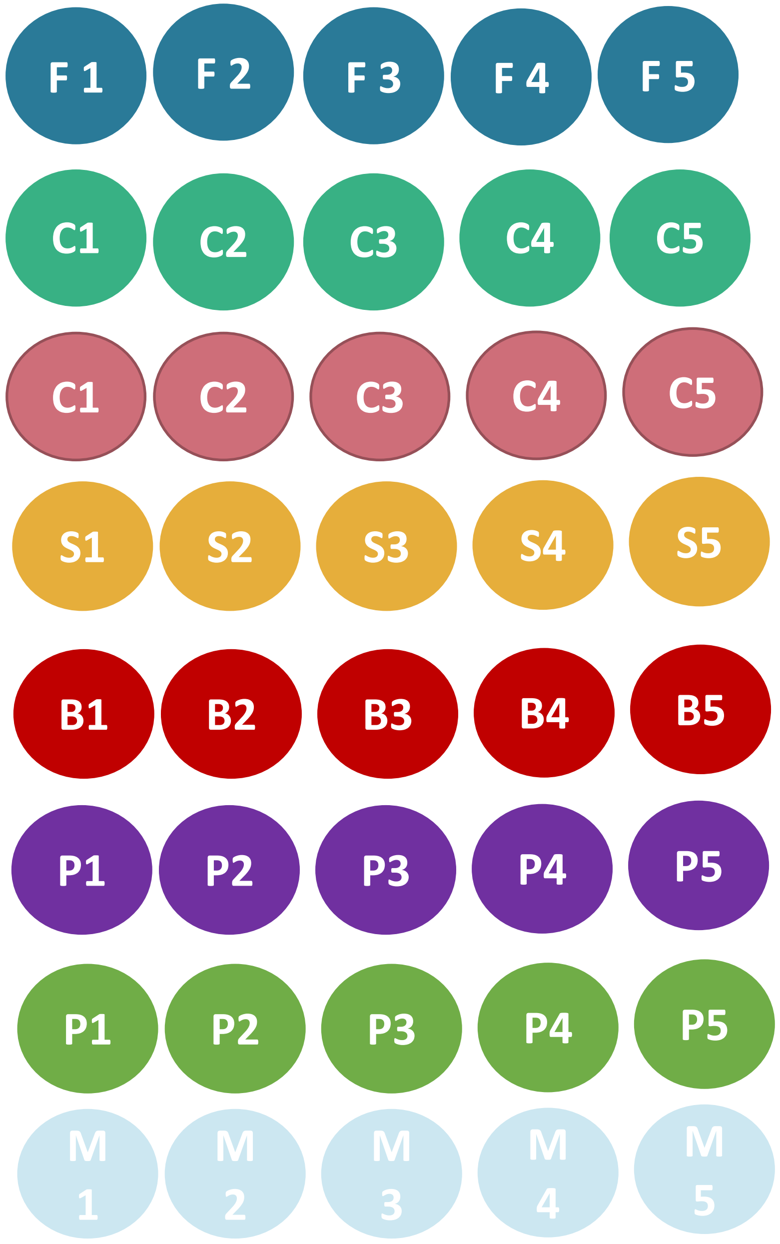
Relationship mapping

Guidance…..

This worksheet helps you to assign each of the names from the table on the previous page to a coloured dot, which you can use to visually map where each of these stakeholders sits in terms of their engagement with and importance to you. You'll be able to do this on the map on the next page.

The colours and letters correspond to the stakeholder groups on page 4. Refer to the table on the previous page and write the names or a symbol or initial onto each circle.

If you have printed this out you can cut out the circles to physically stick onto the map on the next page. If you are using the Word document version of this toolkit you can drag and drop these circles onto the next page.



Guidance…..

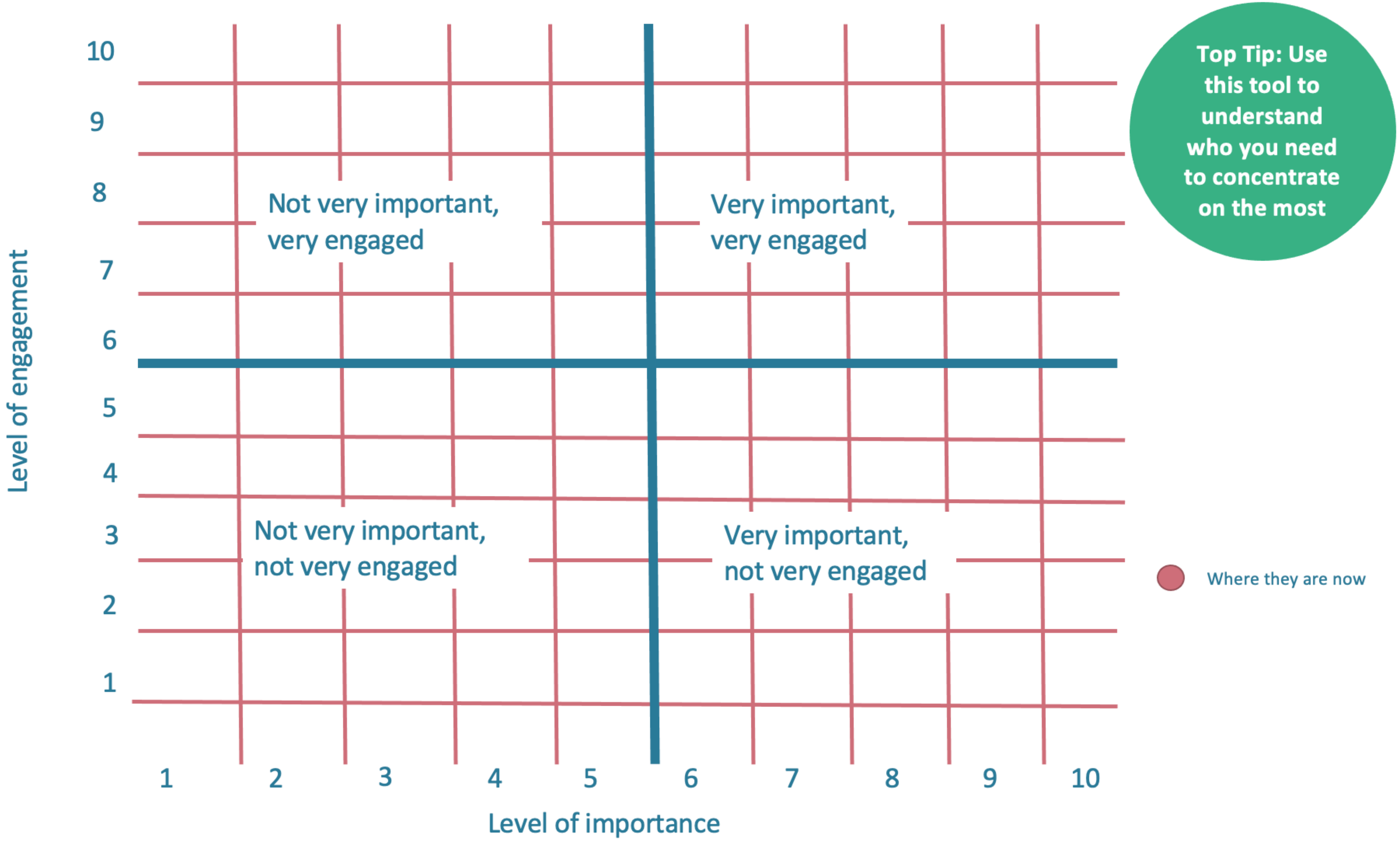
This worksheet is an exercise for you to complete using the dots on the previous page. The map helps you to visually divide up your stakeholders into those who are very important and those who are not very important and then further arrange them into those who are very engaged and those who are not very engaged with you. You need to fill in this map using the circumstances as they are right now.
For example, some of your most important stakeholders might not currently be very engaged with you. If that is the case you need to map them where they are now (lower right hand quadrant) and the next step of this exercise will be to look at where you want them to be in the future.

The lower left hand quadrant on this map is where you will place the dots that correspond to those who are not very important to you and also currently not very engaged with you. Above this, as you can see on the left-hand side, the level of Engagement is increasing according to the scale and in the top left quadrant you will put those who are not very important to you but are actually very engaged.

It might seem hard to decide who is important and who is not very important but because we are thinking about evaluation you need to think about **Impact**. Some stakeholders might be important "out there" - but the questions you are asking are: "How much does what we do impact X?" AND "How much does what X does impact us?"

The next step here is to look at where the dots are concentrated. Are they in the right places? If you want them to move, you can draw arrows to where you want them to be.

Stakeholder mapping exercise



Guidance…..

This page helps you see - at a glance - all the categories of data you currently collect, report on and use to inform your evaluations.

Once you know what data you're already collecting you can see what else you need to collect. In addition, you'll be able to use the data you already have to answer your evaluation questions. The data you already collect might help inform your questions, for example if you know that your ticket sales are decreasing you might put some marketing campaigns in place to overcome this. You'll need to carry on collecting this information to evaluate the success of your marketing.

Some of the data overlaps categories. For example, information you collect about your donations can fit into the income category, but if you're looking at how likely it is that people donate when they buy a ticket, then that information might also belong under audience insights and audience behaviour. This is less about finding the "right" place for data and more about collecting the data while knowing what you want it to tell you about. Donations data can be looked at through the lens of almost any of the categories on this page.

Reporting and evaluation categories

Income

This is quantitative data about money that comes into your organisation from all sources.

Numbers

This is quantitative/numerical data about how many people, tickets, events, volunteers etc you have and how these numbers are changing. This will include all the things you can count numerically that form part of what you do.

Audience Insight

This is basic information about your audiences and who they are, where they come from and what motivates them.

Audience behaviour

This is information about how audiences behave, booking patterns and engagement with you.

Performance and ROI

This is all about the success or otherwise in monetary or numerical terms of your campaigns and marketing activities and the ROI (Return on Investment) that you have achieved.

SROI

Social Return on Investment uses Social Value as a broader understanding of value. It moves beyond using money as the main indicator of value, instead putting the emphasis on engaging people to understand the impact of your activities on their lives.

Audience development

Audience development is using a strategic marketing approach to increase the size and diversity of audiences for arts, cultural and heritage organisations. It differs from conventional marketing in its focus on fulfilling charitable objectives as well as maximising revenue.

Project based outcomes

Project-based outcomes for arts, cultural, or heritage organisations refer to the specific and tangible things or positive changes that are produced through a project, such as exhibitions, performances, preservation work, educational programmes, or community engagement initiatives.

Qualitative feedback

Qualitative feedback is descriptive feedback based on personal opinions and observations from your audiences and stakeholders, focusing on the quality and characteristics of your offer rather than numerical data.

Planning and management behaviour

This is anything to do with administration and strategic direction in terms of training, staff and audience development or data maturity. It is what the organisation does at the top level, to facilitate the processes which affect the whole organisation.

How to fill in these worksheets:

All these worksheets help you think through and document the data you **currently** collect about your activities. The columns with the questions below are the same on all the sheets and this information is here to help you to fill all the worksheets in.

What do you currently report?

You can add your own things to this list and remove those that are not relevant to your organisation.

How do you report it?

Think about your usual reporting activities that contain these things. Do you do an annual report? Do you have spreadsheets which populate a dashboard? Or, perhaps you do not currently report them. Not everything will currently be relevant to you.

How often do you report it?

Quarterly, monthly, weekly or perhaps ad hoc or even never!

What do you get the information from?

It could be your ticketing provider, an automated report that is emailed to you at regular intervals or you might manually download the data from somewhere. Perhaps you have paper surveys or online ones. What tools or data collection methods do you have that collect this data?

What’s the process?

If there is a process or reporting cycle, how does that work? Who is responsible for it? Where does the information get stored and how is it shared across the organisation?

Notes / Integration

This column is for you. Maybe you don’t currently report or collect this data but you want to remind yourself that it might be worthwhile. Maybe you think this links to another category across the worksheets. Maybe you want to talk to someone about this. This is the place to write all of these thoughts down.

Guidance…

This is quantitative/numerical data about how many people, tickets, events, volunteers etc you have and how these numbers are changing. This will include all the things you can count numerically that form part of what you do. Here are some examples:

The number of visitors, participants, or audience members attending events, exhibitions, or programs.

Your total number of members or subscribers

The number of participants engaged in activities, workshops, or outreach programs.

The number of volunteers, hours contributed, or staff involved in specific projects or activities.

Website traffic, page views, unique visitors, click-through rates
The number of partnerships established with other organisations, artists, or community groups.

The number of artworks, artifacts, or collections, as well as loans or acquisitions made by the organisation.

The number of different ticket types sold. The number of events and workshops.

Numbers

What do you currently report?	How do you report it?	How often do you report it?	What do you get the information from?	What's the process?	Notes / Integration
Performances/ Events					
Workshops					
Advance sales					
Doors tickets					
Ticket types					
…					
…					
…					

Guidance…

This data could include ticket sales, funding and grants, income from lettings, donations and memberships and this data can be reported in different ways.

Perhaps you're interested in your high-value customers and how much they spend with you annually. Perhaps you're interested in income from tickets booked in family groups.

Maybe you want to know how much ticket income comes from your members.

This data all fits under incom**e.**

Income

What do you currently report?	How do you report it?	How often do you report it?	What do you get the information from?	What's the process?	Notes / Integration
Performances					
Workshops					
Advance spend					
Income by ticket					
ROI					
Fundraised					
…					
…					

Guidance…

This is data includes information about your audiences such as where your audiences come from - it could be postcode data from their ticket purchases or it could be location data from your website and social media analytics.

Similarly you could collect their ages and other data like protected characteristics information, and those could come from many different sources.

If you've done any audience segmentation work based on postcode data or engagement motivations, then you might know what Audience Agency segments you've been targeting and what motivates them to attend your events.

Audience insight

What do you currently report?	How do you report it?	How often do you report it?	What do you get the information from?	What's the process?	Notes / Integration
Demographics					
Geographics					
Spectrum segment					
Donations					
3rd party attendance					
Diversity					
Protected characteristics					

Guidance…

Data about repeat bookings or lapsed attenders would fit here and other behaviour related information such as group size when they attend and also bookings - who books for a family group and how many tickets does one booking contain on average?

If you look at your bookings data by the number of tickets bought at one time, how can this help your understanding of how your audiences behave?

If you collect information about engagement on social media and with your email campaigns, this data also fits here - but it's not about how well particular campaigns have done, it's more about how much particular people engage with them and then being able to segment your marketing efforts to reach low and high engagers in different ways.

Audience behaviour

What do you currently report?	How do you report it?	How often do you report it?	What do you get the information from?	What's the process?	Notes / Integration
Repeat/lapsed attendance					
Advance booking					
Group size					
Motivations					
Donations					
3rd party attendance					
Engagement with marketing outputs					
…					

Guidance…

What percentage of people open your emails and how many people click?

What is the reach of your social media activity?

When you spent x amount on a marketing campaign for a particular event, what was the income that event generated?

Return on Investment (ROI) is calculated by subtracting the initial cost of the investment from its final value (net income), then dividing this new number by the cost of the investment, and finally, multiplying it by 100.

Performance

What do you currently report?	How do you report it?	How often do you report it?	What do you get the information from?	What's the process?	Notes / Integration
Email performance					
3rd party email stats					
Social media stats					
Referrals					
Reach					
Engagement					
ROI on spend					

Guidance…

Social Return on Investment is broadly agreed to encompass the categories given here. The people's perspective is critical.

You will always create good and bad experiences, but on balance our aim should be to create a net positive impact in the present and for a sustainable future. Social Return on Investment allows you to measure your impact and use this understanding to make better decisions for people. Social return on investment aims to quantify value to people, communities and planet beyond simply measuring profit.

SROI

What do you currently report?	How do you report it?	How often do you report it?	What do you get the information from?	What's the process?	Notes / Integration
PEOPLE AND PLACE Identity, Civic pride					
ENGAGEMENT AND DECISIONS Civic participation, consultation, influence, volunteering, giving					
ECONOMY					
EDUCATION					
PERSONAL DEVELOPMENT Confidence, initiative, positive future					

Guidance…

The goal of audience development is to establish meaningful connections with existing and potential audiences, fostering relationships that go beyond mere attendance and extend to active involvement and ongoing support. It entails understanding the needs, preferences, and barriers of different audience segments and tailoring programming, marketing, and outreach efforts accordingly, potentially to meet charitable objectives or funding conditions.

Your audience development strategies and activities could encompass various approaches, such as targeted marketing campaigns, community outreach, educational programmes, accessibility initiatives, digital engagement, collaborations with diverse groups or artists, audience research, and evaluation itself.

Do you have an audience development plan or strategy? If you do, any data you collect needs to be linked back to the plan to see the link between what you're doing and the effect on your audience growth or deepening of engagement.

Audience Development

What do you currently report?	How do you report it?	How often do you report it?	What do you get the information from?	What's the process?	Notes / Integration
Brand awareness					
Target segments					
Surprise entries					
Database growth					
Referrals					
Against Aud. Dev. plan					
3rd party Aud. Dev. objectives					
…					

Guidance…

Any descriptive feedback you collect that provides subjective opinions, perceptions, and observations from your audiences fits here. Qualitative feedback in this context aims to capture the nuanced and personal aspects of audience experiences, helping you gain deeper understanding, improve your offering, and enhance the cultural impact you create.

Feedback forms, interviews, focus groups, online surveys, audience observations and participation, social media comments, reviews and messages, artist/performer feedback and any data collected through post-event discussions, panels, or Q&A sessions could all be sources for this kind of data.

Qualitative feedback

What do you currently report?	How do you report it?	How often do you report it?	What do you get the information from?	What's the process?	Notes / Integration
Quality of performance					
Value for money					
Overall experience					
3rd party venue					
Questionnaires, surveys					
Focus groups/ stakeholder interviews					
Reviews					

Guidance…

What does your organisation know about their data maturity, staff capacity and strengths?

What training do you do and how do you determine what is needed?

Do you have organisation-wide processes in place to make these kinds of strategic plans and decisions? What informs those processes?

It's the answers to these questions that you need to fill in here. Some ideas have been given to you, but you might have different things happening in your organisation and some of these may not currently be relevant for you.

Planning and management

What do you currently report?	How do you report it?	How often do you report it?	What do you get the information from?	What's the process?	Notes / Integration
Data / Aud. Dev maturity					
Strategic / Campaign delivery					
Staff confidence / ability / training / connections					
Reactive / proactive					
Mental health and wellbeing					
Focus groups / stakeholder interviews					
Capacity					

Beckie Smith
Consultant

Call: 0777 187 5524
Email: Beckie.smith@flyinggeese.co.uk
Follow: @BeckieSmith_7

Flying Geese
Marketing & Development Consultancy