

Self Evaluation Toolkit

This version of the toolkit is for Organisations, Networks and Partnerships wishing to evaluate a completed project or service.

Quality and impact

Vision

Did this work contribute to your organisation's vision? Was it exciting and inspiring?

A shared vision helps people work together towards the same goals.

Was the vision inspiring and up to date during the project? How did you know?

Activities to help improve your evaluation

NHS Scotland

Work to consider your stakeholders using stakeholder mapping.

http://www.isdscotland.org/About-ISD/About-Our-Statistics/_docs/PHI-Guidance-on-Consulting-v0-3-20151203.pdf

University of Warwick

Work to consider your stakeholders using stakeholder mapping.

https://www2.warwick.ac.uk/services/ldc/leadership/change/toolkit_4_stakeholder_mapping.doc

CIPD

Work to consider the context using PEST (Political, Economic, Sociological, Technical, Legal and Environmental analysis).

<https://www.cipd.co.uk/knowledge/strategy/organisational-development/pestle-analysis-factsheet>

Open University

Work creatively on a 'rich picture' vision.

<http://systems.open.ac.uk/materials/T552/pages/rich/richAppendix.html>

Better Evaluation, Australia

Work creatively on a 'rich picture' vision.

www.betterevaluation.org/en/evaluation-options/richpictures

NCVO

Think about campaigning and communications in developing a vision.

<https://knowhownonprofit.org/campaigns>

Quality and impact

Impact

How confident are you that the project had an impact?

A project should make a difference to its stakeholders, should not negatively impact the environment, and should not exclude people.

Did the project:

- make a difference to its audiences, participants or local economy?
 - avoid negatively impacting the environment - better still, did it promote better care of the environment?
- include rather than exclude people - even better, did it actively promote diversity, for example ethnicity, faith, age, socio-economic groups, disability, sexual orientation and gender?

Activities to help improve your evaluation

NPC

Work to plan for impact and then review using a Theory of Change.

<http://www.thinknpc.org/our-work/our-services/theory-of-change/>

NPC

Use a self assessment tool specifically to review your impact practice.

<http://inspiringimpact.org/measuringup/>

Happy Museum

Work to plan impact in a more creative and flexible style using a Story of Change.

<http://happymuseumproject.org/story-of-change/>

MLA

Use cultural sector expertise on Generic Learning and Social Outcomes

<http://www.artscouncil.org.uk/measuring-outcomes/generic-learning-outcomes#section-1>

Make Culture Work

Work to develop evaluation practice by sharing with others.

<http://www.makingculturework.org.uk/>

NCVO

<https://knowhownonprofit.org/organisation>

Culture Case

Use cultural research for general evidence of impact.

www.culturecase.org

Happy Museum

67

<http://happymuseumproject.org/resources/tools/>

Social Value UK

<http://www.socialvalueuk.org/>

NEF, Charities Evaluation Service.

<http://www.proveandimprove.org/>

Arts Enterprise with a Social Purpose (Aesop)

<http://www.ae-sop.org/>

Quality and impact

Quality

How confident are you about the creative or cultural quality of the project?

The project should be of the best quality possible to meet the needs of its diverse stakeholders.

Was the quality of the processes and finished product right for all of the organisation's stakeholders?

Activities to help improve your evaluation

ACE

Work systematically on quality across the organisation using a quality framework.

<http://www.artscouncil.org.uk/quality-metrics/quality-metrics>

ACE

Work systematically on quality for young people using Quality Principles.

<http://www.artscouncil.org.uk/cultural-education-challenge/cultural-education-challenge-resources#section-4>

Quality and impact

Repeat audiences

How well did the project serve its regular audiences, visitors, customers, participants or community?

Regular audiences provide support and a reliable income stream. In return, they must have the opportunity to progress.

Consider how well the project served its repeat audiences, whatever their level of interest.

Activities to help improve your evaluation

DCMS, ACE, Historic England, Sport England

Use cultural sector data to inform audience decisions.

<http://www.artscouncil.org.uk/taking-part-survey>

Audience Agency

Use cultural sector market segmentation to inform audience decisions.

<https://www.theaudienceagency.org/>

Arts Marketing Association

Sign up to cultural sector marketing expertise.

<http://www.a-m-a.co.uk/>

Arts Marketing Association

Use cultural sector case studies for shared practice.

<http://www.culturehive.co.uk/>

Office for National Statistics

Use national, regional or local data to inform audience decisions.

<https://www.ons.gov.uk/>

Public Health England

Use national, regional or local data to inform audience decisions.

<http://fingertips.phe.org.uk/profile/health-profiles>

Quality and impact

New audiences

How well did the project reach and include new audiences, visitors, customers, participants or communities?

New audiences are essential for future income and artistic development.

Consider how well the project reached new audiences and whether they fell within your targeted demographic groups.

Activities to help improve your evaluation

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<https://www.ons.gov.uk/>

Public Health England

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<http://fingertips.phe.org.uk/profile/health-profiles>

CIPD (Ansoff)

Use risk management expertise whilst deciding how to develop new audiences.

<http://www.conceptdraw.com/examples/marketing-matrix-and-schedules>

People development

The team

Did the project have the right team members to deliver the vision and reach regular or new audiences authentically?

Making sure you have the right project team is essential for quality and impact, and must be regularly reviewed.

Project members also need to reflect existing and new audiences and communities, and include a range of learning methods to meet different needs. This means that recruitment at all levels - from board to volunteers - should use best equality and diversity practice.

Think about the skillset, experience, diversity and styles of different project members, from the board to volunteers.

Activities to help improve your evaluation

NCVO

Audit the skills in your team.

<https://knowhownonprofit.org/people/staff/managing-performance-learning-and-skills-development/development>

Office for National Statistics

Use data from the Office of National Statistics to understand your local population.

<https://www.ons.gov.uk/>

NCVO

Use established expertise for recruiting and managing staff and volunteers.

<https://knowhownonprofit.org/people>

People development

Roles and performance

Did all team members know their role, their relationship to others and how well they were performing?

People need up-to-date information about where their role sits within the project; more so as team working becomes more common. Good team working and clearly defined roles can have a huge impact on how projects function and how organisations attract and keep the right people.

Consider board members, managers, practitioners, freelancers and volunteers, and how each got to know how their role interconnected with others.

Activities to help improve your evaluation

NCVO

Audit the skills in your team.

<https://knowhownonprofit.org/people/staff/managing-performance-learning-and-skills-development/development>

CIPD

Use established expertise for making sure good people management leads to excellence.

<https://www.nsai.ie/NSAI/files/7f/7f6730e9-d0df-4231-ab1e-76b6aa26e035.pdf>

NCVO

Use established expertise on leadership and managing change.

<https://knowhownonprofit.org/leadership>

Belbin

Work with the team to understand different team working styles and strengths.

<http://www.belbin.com/>

Myers Briggs

Work with the team to understand different team working styles and strengths.

<http://www.myersbriggs.org/>

People development

Professional development

Did everyone in the project get training or on-the-job support for their role and to achieve their potential?

Professional development should inspire people as well as deliver the organisation's vision and plans. When resources are short, the right culture may make up for formal training.

Think about professional development, including its role in enabling people to achieve their full potential. And consider whether the project's culture supported and inspired everyone to deliver the vision, from board members to volunteers.

Activities to help improve your evaluation

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CIPD

Use established expertise for making sure good people management leads to excellence.

<https://www.nsai.ie/NSAI/files/7f/7f6730e9-d0df-4231-ab1e-76b6aa26e035.pdf>

GROW model

Work with individuals in a coaching style to support their development.

https://www.google.co.uk/#safe=active&q=grow+coaching+model&*>

CIPD

Use a 360 degree review approach for a team perspective on people's performance.

<https://www.cipd.co.uk/knowledge/fundamentals/people/performance/feedback-factsheet>

Gallup

Work with people's strengths.

<http://strengths.gallup.com/110440/About-StrengthsFinder-20.aspx>

Quick MBA

Work with practical guidance on effectiveness.

<http://www.quickmba.com/mgmt/7hab/>

School for Social Entrepreneurs

<https://www.the-sse.org/>

ACEVO

Sign up to leadership support.

<https://www.acevo.org.uk/>

People development

Wellbeing and job satisfaction

Did team members enjoy their work and find it satisfying?

Whether people enjoy their work is one of the best indicators of success in a sector which depends on its workforce.

Thinking about job satisfaction, how happy and satisfied were the project's members?

Activities to help improve your evaluation

Happy Museum

34

<http://happymuseumproject.org/resources/tools/>

Wellbeing at work (CIPD)

<https://www2.cipd.co.uk/NR/rdonlyres/DCCE94D7-781A-485A-A702-6DAAB5EA7B27/0/whthapwbwrk.pdf>

NICE guidance

<https://www.nice.org.uk/guidance/ph22>

People development

Partnerships

If your project was in partnership, was it the right partnership to best deliver the vision?

Collaboration with partners will be a feature of the future funding landscape and it's also good for staff and audiences.

Think about the strength of partnerships, including depth and breadth, and the ability of partnerships to improve diversity, capability or capacity.

Activities to help improve your evaluation

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University of Warwick

Work to consider your stakeholders using stakeholder mapping.

https://www2.warwick.ac.uk/services/ldc/leadership/change/toolkit_4_stakeholder_mapping.doc

Big Lottery

Use expertise on working in partnership generally.

http://www.biglotteryfund.org.uk/pub_good_practice_guide.pdf

NCCPE

Use expertise on working in partnership with HE.

<https://www.publicengagement.ac.uk/do-it/working-partnership>

Process development

Planning and monitoring

Did the project have the plans it needed for cultural or artistic, social, financial and environmental legacy?

While the arts and culture sectors must be responsive and seize opportunities, reliable planning and delivery provide the secure base from which to launch innovation.

Thinking about plans for cultural and artistic, social, financial and environmental areas - were the plans up to date and effectively reported against? Did they feedback into the planning process?

Activities to help improve your evaluation

Tutorials Point

Use expertise from many years of project management experience.

http://www.tutorialspoint.com/management_concepts/project_management_triangle.htm

NVCO

Use expertise on non-profit project management.

<https://knowhownonprofit.org/people/your-development/professional/projectman>

Process development

Information management

How well did the project collect, catalogue, store, retrieve and share information?

Effective information collection, storage and sharing can really inform the way projects work and can help them run smoothly.

Think about whether the project's information management supported efficient, ethical and effective working practice, whether it helped the project in its local context and whether it can help future projects.

Activities to help improve your evaluation

NPC

Use a self assessment approach to planning your use of evidence.

<http://inspiringimpact.org/measuringup/>

HM Govt.

Use data protection legislation to ensure information is safe.

<https://www.gov.uk/data-protection/the-data-protection-act>

Arts Professional

Use a box office system that meets your needs. There are many on the market and this comparison may help.

<http://www.artsprofessional.co.uk/taxonomy/term/699/all>

Collections Trust

Use expert guidance on collections management.

<http://collectionstrust.org.uk/product/collections-management-a-practical-guide/>

Online Sharing: Dropbox

<https://www.dropbox.com/home>

Communications: Mailchimp

<https://mailchimp.com/>

Online Sharing: Box

125

<https://www.box.com/home>

<https://www.surveymonkey.co.uk/>

Database: Artifax

<http://www.artifax.net/>

Database: CivicCRM

<https://civicrm.org>

Database: Lamplight

<http://www.lamplightdb.co.uk>

Online Conferencing: Skype

<https://www.skype.com>

Online Conferencing: Google Hangout

<https://hangouts.google.com/>

Process development

Communications

How well did the project communicate its messages, both externally and internally?

Communication plans should start with the target market and the market's needs, but also be clear on the key message and how the project can evidence it persuasively. Internally the project must be clear about 'who needs to know' so that it operates effectively and involves the right people.

Think about both external and internal needs, and the use of digital channels.

Activities to help improve your evaluation

NCVO

Work on a broad communications strategy using non-profit expertise.

<https://knowhownonprofit.org/campaigns/communications/communications-strategy>

IPA

Work on campaigning communications specifically.

<http://www.ipa.co.uk/Document/communication-strategy-best-practice-guide>

Government Communication Service

Work on internal communications specifically.

<https://communication.cabinetoffice.gov.uk/ic-space/strategy-and-internal-communications/developing-an-internal-communications-strategy/>

Process development

Resources and facilities

Did you use your physical and other assets creatively, sustainably and to achieve value for money?

Physical assets like venues and collections are central to the audience experience, but they are costly to look after and some see them as exclusive. Protecting intangible assets like brand and intellectual property is an ongoing task, and cultural and environmental resources are even harder to maintain.

Did you consider different types of assets in making sure you the project achieved the best value for money and the most creative results? Did the project safeguard assets for the future, including protecting the organisation's intellectual property (if relevant) and brand? Did you extend these approaches to suppliers?

Activities to help improve your evaluation

Julie's Bicycle

Work to ensure the sustainability of your venue and approach.

<http://www.juliesbicycle.com/services>

BREEAM

Use a recognised model of sustainable practice for building.

<http://www.breeam.com/>

Intellectual Property Office

Use guidance on your intellectual property approach.

<https://www.gov.uk/government/organisations/intellectual-property-office>

Ethical Property Foundation

Use guidance from experts in managing property for charities.

<http://www.ethicalproperty.org.uk/content.aspx?CategoryID=246>

Process development

Financial management

How strategic and effective was the project's financial planning, monitoring and reporting?

Financial and budget management has a role at every stage of your project's work - for example, allocating funds properly using the full cost recovery method is essential to show the true cost of services, while monitoring how things are going and reporting on surpluses or losses are basic project management. Budget management should be strategically linked to cultural and artistic work. More sophisticated financial management should also account for social and environmental assets and impact.

Think about all these elements before, during and after spending.

Activities to help improve your evaluation

Big Lottery.

Use guidance on Full Cost Recovery for managing finances as well as fundraising.

<https://www.biglotteryfund.org.uk/funding/funding-guidance/applying-for-funding/full-cost-recovery>

Association of Chartered Certified Accountants.

Use the Cost Volume Profit analysis approach to manage a portfolio of projects.

<http://www.accaglobal.com/uk/en/student/exam-support-resources/fundamentals-exams-study-resources/f5/technical-articles/CVP-analysis.html>

Chartered Institute of Public Finance & Accounting.

Sign up to CIPFA newsletters for regular updates on the public finance.

<https://www.cipfa.org/>

NCVO

Use guidance on non-profit financial management.

<https://knowhownonprofit.org/organisation/operations/financial-management>

Process development

Technical systems

Did the project's technical systems allow it to run smoothly, keep things safe and respond to the modern world?

Good processes make a huge difference to productivity, from speeding up administration to capturing learning for sharing.

Were the project's processes and systems efficient, up to date and enabling, both with audiences and behind the scenes with team members and resources?

Activities to help improve your evaluation

Sign up to membership organisations especially for technical staff, so they can stay up to date with new developments.

AmbITION

Work on an overview of your digital transformation.

<http://www.getambition.com>

Online Collaboration: Google

<https://www.google.co.uk/docs/about/>

Online Sharing: Box

125

<https://www.box.com/home>

Online Sharing: Dropbox

<https://www.dropbox.com/home>

Meeting management: Doodle Poll

http://doodle.com/en_GB/

Project Management: Teamwork

<https://www.teamwork.com/>

Communications: Mailchimp

<https://mailchimp.com/>

Communications: Survey Monkey

Project Management: Basecamp

<https://basecamp.com/>

Project Management: SmartSheet

<https://www.smartsheet.com/>

Database: Artifax

<http://www.artifax.net/>

Database: CivicCRM

<https://civicrm.org>

Database: Lamplight

<http://www.lamplightdb.co.uk>

Database: Tessitura

http://welcome.tessituranetwork.com/?gclid=Cj0KEQjwiI3HBRDv0q_qhqXZ-N4BEiQAOTiCHgNrms6zFcazGaRIB3A6wKH_mVv6C9nm5UPw9S1gLBYaArNS8P8HAQ

Online Conferencing: Skype

<https://www.skype.com>

Online Conferencing: Google Hangout

<https://hangouts.google.com/>

Process development

Legislation

How up to date was the project's understanding of the legislation that affects it?

Legislation is a huge and varied issue for projects, ranging from equality and diversity to child protection, financial management and environmental obligations.

Think about who was responsible for what in your project and whether policies were applied and up to date.

Activities to help improve your evaluation

Charity Commission

Use free resources from the Charity Commission.

<https://www.gov.uk/government/organisations/charity-commission>

NCVO

Use free resources from NCVO.

<https://www.ncvo.org.uk/policy-and-research/charity-law-and-regulation>

HM Govt

Use free resources from the Department for Business, Energy & Industrial Strateg.

<https://www.gov.uk/government/organisations/department-for-business-energy-and-industrial-strategy>

Legal Advice Centre

Use free resources from the Legal Advice Centre

<http://www.legal-advice-centre.co.uk/>

LASA

Use free resources from LASA

<http://lasa.org.uk/>

Copyright User

Use free resources from Copyright User

<http://copyrightuser.org>

LMSC

<http://www.lmsconline.org/>

FSB

Sign up to the Federation of Small Businesses.

<http://www.fsb.org.uk/>

Business development

Internal alignment

Was the project aligned and consistent internally and with your organisation generally?

Over years policies and practice tend to multiply and diverge. Making sure that project plans are consistent with the organisation's goals makes projects more efficient and effective.

Consider how well these things link: the needs of repeat or new audiences, the needs of partners, the vision, mission and governance, intended outcomes, 'stewardship' obligations, people development and artistic, learning, business and other plans.

Activities to help improve your evaluation

NPC

Work to plan and review using a Theory of Change.

<http://www.thinknpc.org/our-work/our-services/theory-of-change/>

Happy Museum

Work to plan impact in a more creative and flexible style using a Story of Change.

<http://happymuseumproject.org/story-of-change/>

Association of Independent Museums

66

<http://www.aim-museums.co.uk/>

NCVO

<https://www.ncvo.org.uk/practical-support/quality-and-standards/pqasso>

Inspiring Learning for All

<http://www.artscouncil.org.uk/advice-and-guidance/inspiring-learning-all-home-page>

Cabinet Office

<http://vcsestrengthchecker.org.uk/>

British Library

<http://www.bl.uk/business-and-ip-centre>

Social Enterprise UK

<https://www.socialenterprise.org.uk/>

Work in a large organisation towards international standards.

https://www.iso.org/files/live/sites/isoorg/files/archive/pdf/en/iso_9000_selection_and_use-2009.pdf

Mindtools

Use systematic approaches to decision making.

https://www.mindtools.com/pages/main/newMN_TED.htm

Business development

National context

How up to date was the project's knowledge about its wider context?

If awareness of the wider world was important to the project, think about its political, funding, cultural, social economic and environmental learning. Consider whether the organisation can learn anything from the project.

Activities to help improve your evaluation

CIPD

Work to consider the context using PEST (Political, Economic, Sociological, Technical, Legal and Environmental analysis).

<https://www.cipd.co.uk/knowledge/strategy/organisational-development/pestle-analysis-factsheet>

Wikipedia

Sign up to think tanks and institutes that are relevant to you.

https://en.wikipedia.org/wiki/List_of_think_tanks_in_the_United_Kingdom

Business development

Local context

How well did the project understand its local, place-based role and its 'markets'?

Knowledge of the locality and how the project fits into it are central to a successful project. Children, young people and those who are socially disadvantaged may be especially important, along with other groups, like older people.

Consider whether local audiences, partners and stakeholders felt inspired and involved in the project. Did the the project increase the diversity of access and the targeting of specific groups?

Activities to help improve your evaluation

Office for National Statistics

Use data from the Office of National Statistics to understand your locality.

<https://www.ons.gov.uk/>

ACE

Use Arts Council England cultural education data.

<http://www.artscouncil.org.uk/research-and-data/children-and-young-people>

Use data from local partnerships and forums, like Health and Wellbeing Boards, Local Enterprise Partnerships (LEP), Chambers of Commerce and local Councils for Voluntary Service (CVS).

Business development

Research & evaluation

How well did the project reflect, evaluate, research and innovate?

Research and evaluation take many forms and are essential for improvement. However, without intentional planning, the project may have risked evaluation getting side-lined.

How well did evaluation assess the project's cultural and artistic, social, financial and environmental performance? How well did the evaluation communicate with diverse stakeholders to get their genuine views?

How well did learning flow through the project's working practice for ongoing improvement?

Activities to help improve your evaluation

Culture Case

Use cultural research for general evidence of impact.

www.culturecase.org

NCVO

Work on an overview of your impact.

<https://knowhownonprofit.org/organisation>

MLA

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Social Value UK

<http://www.socialvalueuk.org/>

NEF, Charities Evaluation Service.

<http://www.proveandimprove.org/>

Business development

Income generation

How effectively did the project generate income?

Projects can maximise income in many ways, all of which need robust skills to deliver.

Think about the range of skills required, from earning income to working profitably with partners to providing persuasive evidence to funders and commissioners.

Activities to help improve your evaluation

NCVO

Use national income generation guidance.

<https://knowhownonprofit.org/funding>

Arts Fundraising

Use national funding-raising guidance.

<http://artsfundraising.org.uk/>

Artwork, ROH Bridge, KentCC

Use commissioning guidance for the cultural sector.

<http://www.artscommissioningtoolkit.com/>

Beehive

Use a funder finder.

<https://www.beehivegiving.org/>

Business development

Risk

How well did the project contribute to a balance of risky and safe work?

Diverse projects can create a mixed delivery model to spread risk and to help maintain the interest of staff and audiences.

Did the project contribute to a range of entrepreneurial and reliable ventures and a range of delivery relationships and structures?

Activities to help improve your evaluation

Tutorials Point.

Work through established risk management processes with your team.

http://www.tutorialspoint.com/management_concepts/project_risk_management.htm

IRM

Sign up to the Institute of Risk Management.

<https://www.theirm.org/>

Business development

Future plans

Was the project relevant to your future delivery and has it contributed to future plans?

Projects should look both inwards and outwards to plan for what is a very changeable future in terms of creativity, politics, economics, society, technology, the law and the environment.

Think about the project's performance over time as well as the bigger external picture.

Activities to help improve your evaluation

Local Enterprise Partnership network

47

<https://www.lepnetwork.net/>

Local Authorities

none

NCVO

Work with your team to agree a business plan, however short.

<https://knowhownonprofit.org/tools-resources/business-plan-template>

CultureCase

Sign up to cultural data and research.

<http://www.culturecase.org/>

CIPD

Work to consider the context using PEST (Political, Economic, Sociological, Technical, Legal and Environmental analysis).

<https://www.cipd.co.uk/knowledge/strategy/organisational-development/pestle-analysis-factsheet>

TED Talks

Get inspired!

<https://www.ted.com/>