WHAT THIS TOOLKIT INCLUDES

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*See the Evaluation Toolkit Supplement for an Action Plan and Worksheet to help put these best practices to work for your project or organization.
Why does the Council ask you to evaluate?

Evaluation helps to guide your public humanities project’s development and enables you better learn from its implementation. “Did the project go how I expected? How would I plan differently next time? What worked well?” Answering questions like these will help you understand what you achieved with your project, how you achieved it, and ways you can improve future work. Considering evaluation as you design your project will strengthen your proposal to the Council. Ultimately, evaluation will help you improve your programs and make better organizational decisions.

Why a toolkit?

Toolkits are helpful. Whether you’re working on your car, or learning a new language, you need a framework to advance your skills. With this toolkit, the Council provides a framework to improve evaluation plans and measures. The toolkit shares best practices, encourages applicants and humanities practitioners to improve their projects, and provides everyone with pathways to advance their evaluative skillsets. We are grateful to the graduate students, community members, and evaluation professionals who worked with us to develop this toolkit.

How does this toolkit relate to the Council’s grants program?

The Council carefully considers every proposal and weighs each project on its unique impact, opportunities, and merits. We acknowledge and consider all the various limitations of a project, including staffing, project finances, experience, and bandwidth, during our decision-making processes. We also believe that a robust evaluation plan is a core pillar of a strong public humanities project.

In turn, reviewers at the Council expect evaluation plans to be representative of 1) thoughtful engagement with best practices in evaluation and 2) your organization’s capacity to evaluate: bandwidth, staffing, experience, finances, etc.

In our grant applications, we ask you to present an evaluation plan. An evaluation plan structures evaluative measures of a project. We encourage you to go through this toolkit as you construct your grant application. Remember: it is essential that an evaluation plan is organized at the onset of a public humanities project. It should never be an afterthought.

TIP: WHAT TO INCLUDE IN AN APPLICATION?

The Council does not have a set format for an evaluation plan, because grant-funded projects (by design) are all so varied. However, the Worksheet found in the Supplement can help you create your plan. If you keep notes and answer questions we pose in the Toolkit, you are well on your way to completing the grant application’s sections that focus on evaluation. If you still have questions after working through the toolkit, please feel free to call Council staff. We’re happy to discuss your project and ways we can help improve your evaluation plan!
This toolkit provides a broad introduction to evaluation and will help you devise a plan for meeting the Council’s evaluation expectations in your application and final reporting requirements. The toolkit takes you through the steps of evaluation, poses key questions, and provides worksheets and examples to help you think through evaluation from beginning to end—all to ensure you feel capable and inspired to evaluate your work! The toolkit is for those both new and experienced in evaluation. If you are more experienced with evaluation, the document provides a helpful overview, especially as you consider what the Council is specifically looking for in a strong evaluation plan.

In the next section, we introduce foundational ideas about evaluation, considering the question: Why do we evaluate? Then, the guide takes you through four standard steps in preparing an evaluation plan:

1. **Focus Your Project:** Reaffirm Project Goal, Outcomes, and Outputs

2. **Frame and Prepare:** Set an Evaluation Goal

3. **Set Benchmarks:** Develop your Evaluation Questions and Indicators and choose an Evaluation Method for collecting data

4. **Analyze Data and Communicate Impact:** Share your results and engage stakeholders

Although the Toolkit is targeted for public humanities practitioners in Rhode Island who plan to apply to the Council for funding, it does include general best practices applicable to all public humanities projects.
You already evaluate:

You might not know it, but you already evaluate your work, you just may not call it “evaluation.” In your practice of program planning, do you: reflect on your work; change aspects of your project; revise your budget for next year’s resources; change communication strategies to reach people who were missing at your last event; or overhear visitors discussing what they liked about your program and adapt it accordingly? If you answered yes to any of these questions, then you are already evaluating your work. Evaluation helps us get to ‘how’ and ‘why’ something is working or not working and provides concrete data of the function and outcomes of your project. This is the core of evaluation!

Evaluation is a way to learn:

Evaluating your project is an opportunity for you to grow with each decision you make. Professionals and academics agree that evaluating your project can help you:

- **Understand your project** - Evaluation answers questions like: What does your program or project actually do? What happened or did not happen? Was it what you expected? Why or why not? Evaluating your project can show how stakeholders experience your project.

- **Improve your project** - Evaluation helps to answer questions like: So what? and Now what? It asks: What do my findings mean? What part of my project was successful? What do my findings suggest for future projects? Understanding the strengths and weaknesses of your project through evaluation helps you with future decision making.

- **Test the theory underlying your program** - Your project is probably based on a certain theory you have: children become more engaged citizens through active learning activities, or a more innovative tour attracts new audiences. Evaluating your project will help you understand if your assumptions are correct.

- **Work towards your organization’s mission** - If you have an organizational mission, an evaluation plan will help you align the goals of your project to this charge. Evaluating your project helps you understand and articulate how you work toward the realization of your mission, and how you can improve your efforts.

- **Tell your organization’s story** - You collect both analytical and anecdotal information with evaluation. Numbers demonstrate your impact and reach. Stories introduce the humans behind the numbers. Together, this information paints a full narrative of your organization’s impact. With strong evaluation practices, you are a better advocate when sharing your work. Let the numbers and stories do the talking!

- **Share best practices** - You can help colleagues across the state and the country grow from what you have learned through evaluation.

- **Support fundraising efforts** - The better you know your work, the better you can advocate for it. The data you acquire through evaluation demonstrates the impact of your work. Funders and/or donors are excited to see concrete examples of your methods. An in-depth knowledge of your work highlights your expertise and experience. Stories and numbers from your evaluation are a great fundraising tool!

**Begin evaluation at the start of your project:**

By asking you to write an evaluation plan, the Council encourages you to evaluate your work from the onset of your project. Doing so will enable you to improve your project—even during the planning process. This type of formative evaluation—observing your process and evaluating its implementation—helps you keep track of allocated resources and stay in touch with the changing needs of the community.

**TIP:** Creating an evaluation plan using the **Supplemental Action Plan and Worksheet** simply allows you to be more intentional in reflecting on and improving your work.
CREATING AN EVALUATION PLAN

Steps to take and questions to answer:

On the next few pages, we go through all the different steps to consider when creating an evaluation plan. Throughout the document, we refer to examples and worksheets that you can find in the appendices of the Toolkit. If you are new to evaluation, or writing an evaluation plan for the first time, take a close look at the steps below. Take notes in preparation for your application to the Council.

**TIP:** Use the *Supplemental Worksheet* for your notes. When complete, the worksheet will be a great foundation for answering the evaluation questions in your application for grant funding from the Humanities Council.

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**Step 1: Focus Your Project**
- Reaffirm Project Goals, Outcomes, and Outputs.
- Think big!
- Connect the dots.

**Step 2: Frame and Prepare**
- Set an Evaluation Goal that is drawn from items in Step 1.
- What do you want to know and why?
- What resources do you have?

**Step 3: Set Benchmarks**
- Generate Evaluation Questions.
- Determine Indicators.
- Choose Evaluation Methods.
- Keep track of and organize the data you collect.

**Step 4: Analyze Data and Communicate Impact**
- Review and interpret your data.
- Share the impact of your project with stakeholders.
- Use findings to inform the planning of your next project.

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*Step 1: Focus Your Project*  
- p. 7 - 10

*Step 2: Frame and Prepare*  
- p. 11 - 12

*Step 3: Set Benchmarks*  
- p. 13 - 17

*Step 4: Analyze Data and Communicate Impact*  
- p. 18 - 19
Step 1 - Focus Your Project: Reaffirm Project Goals, Outcomes, and Outputs

Let's start at the beginning. In this step, we guide you through affirming your project goal, outcomes, and outputs. Having a clear project goal and strong outcomes and outputs will help you determine an evaluation goal, evaluation questions, indicators (i.e., what to measure), and how to do so via evaluation methods.

**Project Goal:** Broad statement describing the desired change in the community resulting from your project.

*What change do you want to achieve?*

**Project Outcomes:** Concrete and attainable changes in behavior, status, skill, knowledge, or circumstance in the community.

*What change in behavior/skill set do you want to see?*

**Project Outputs:** Tangible and concrete activities and products of your project.

*What will you do to achieve your goal?*

**Evaluation Goal:** Defined by your project goal, outcomes, and outputs, this will establish a core focus area for evaluation questions and indicators.

*What is the focus of your evaluation plan?*

**Evaluation Questions:** Broad guiding questions that determine the direction of your evaluation.

*What do you want to measure?*

**Indicators:** The data that will demonstrate the change in behavior, skillset, knowledge, etc., described in your outcome statement.

*What does success look like?*

**Evaluation Methods:** Surveys, pre-test/post-test, observations, focus groups, etc.

*How will you collect evaluative information?*

**End Result!** Analyzing data and communicating impact with shareholders

*What will you do with the findings and how will they be shared with stakeholders?*

**TIP:** Using the Supplemental Worksheet can help you move more easily from an abstract goal to a measurable outcome.
Most likely, you have an idea of what change you ultimately hope to achieve through your project. Those ideas can be abstract and hard to pin down, so it can help to look at your organization’s mission to determine your project’s goal. Basing your project’s goal off of your mission helps you to make it more specific and directly related to your organization’s charge. At the Council, we define a goal as a broad statement that describes the change you want to achieve in the community.

A goal establishes the overall direction for your project and defines the scope of what can be achieved. See the following examples:

**Example 1:** For a civic education project about race relations in Rhode Island, the goal might be *to reduce racist attitudes and misconceptions in Rhode Island.*

**Example 2:** For a documentary about local youth organizers in Providence, the goal might be *to increase civic agency of youth in Rhode Island.*

**Example 3:** For an exhibit about Pablo Neruda’s trip to Rhode Island, the goal might be *to increase Rhode Islander’s appreciation of bilingualism and celebrate Spanish-language poetry.*

**Example 4:** For research on local musicians of color in Woonsocket, the goal might be *to inspire new creative practices and create a historical basis for contemporary musicians of color in Northern Rhode Island.*

**TIP:** The goal can be big, but should be specific to the audience and project it serves!
As you can imagine, a large and abstract goal can be difficult to measure. After all, how do you combat racist attitude and how do you know if you’re succeeding? Developing your goal into outcomes can help you narrow down the scope of your project’s evaluation. **Outcomes are measurable and attainable changes you aim to achieve on the path to longer-term goals.** They are often changes in behavior, status, skills, attitude, knowledge or circumstance of your community or organization.

Outcomes are what you will measure with your evaluation. The examples below show various outcome statements. A project might have one goal but several outcomes.

| Example 1: For a civic education project about race relations in Rhode Island, with the goal to reduce racist attitudes and misconceptions in Rhode Island, outcomes might be: | • Students’ knowledge of systemic and historic racism in the nation and state is increased.
• Students’ capacity to stand up against racism on an individual, community, and national level is strengthened.
• The participating school increases relationships with local organizations whose mission is aligned with the project goal. |
|---|---|
| Example 2: For a documentary about local youth organizers, with the goal to increase civic agency of youth in Rhode Island, outcomes might be: | • Public knowledge about local youth organizers is increased.
• Young activists in Rhode Island are more empowered to continue their work.
• Youth interest in participating in political events and afterschool programs is increased. |
| Example 3: For a traveling exhibit about Pablo Neruda’s trip to Rhode Island, with the goal to increase Rhode Islander’s appreciation of bilingualism and celebrate Spanish-language poetry, outcomes might be: | • Rhode Islanders’ knowledge of and engagement with Spanish-language poetry is increased.
• More bilingual speakers in Rhode Island are empowered to do public speaking.
• Awareness of and respect for bilingual speakers in Rhode Island is increased.
• Knowledge of translation work and practice is increased.
• Spanish-language collections in local libraries are expanded. |
| Example 4: For research on local musicians of color in Woonsocket with the goal to inspire new creative practices and create a historical basis for contemporary musicians of color in Northern Rhode Island, outcomes might be: | • Expand and diversify Woonsocket historical narratives.
• Increase public knowledge of local music and its varied historical traditions.
• Engage new audiences with local Woonsocket history. |

**TIP:** Use action verbs in your goal statement, like: improve, strengthen, reduce or increase.
**Project Outputs or Activities**

Outputs are the **tangible activities you will do, or content you will produce in order to achieve your outcomes**. They are literally the products of your project: the exhibit, the field trip, the documentary, etc.

| Example 1: For a civic education project about race relations in Rhode Island, with the goal to reduce racist attitudes and misconceptions in Rhode Island, outputs might be: | • Produce high school curriculum around the book *The New Jim Crow*.  
• Host four guest lectures led by multicultural organizations.  
• Organize a direct-action workshop at the school with a local organization.  
• Set up post-grant meetings with local organizations and the school to discuss continuing work. |
|---|---|
| Example 2: For a documentary about local youth organizers, with the goal to increase civic agency of youth in Rhode Island, outputs might be: | • Produce a documentary film.  
• Host three public screenings at local high schools.  
• Create direct action guides to distribute at screenings.  
• Host one public panel about local politics and youth engagement. |
| Example 3: For a traveling exhibit about Pablo Neruda’s trip to Rhode Island, with the goal to increase Rhode Islander’s appreciation of bilingualism and celebrate Spanish-language poetry, outputs might be: | • Produce a traveling exhibit.  
• Host three translation workshops at libraries.  
• Organize an open mic for readings of English and Spanish poetry.  
• Create Spanish-language acquisition guides for libraries. |
| Example 4: For research on local musicians of color in Woonsocket with the goal to inspire new creative practices and create a historical basis for contemporary musicians of color in Northern Rhode Island, outputs might be: | • Write and publish an article about musicians of color in Woonsocket.  
• Host a public lecture in partnership with the Woonsocket Historical Society.  
• Invite three local musicians to play music composed by the researched musicians at the lecture.  
• Publish columns in “The Call” about the research process. |
**Step 2 - Frame and Prepare: Set Your Evaluation Goal**

To start planning, consider the following questions: Why do you want to evaluate? Who are the stakeholders and what are the stakes? What resources do you have?

### Why set an Evaluation Goal?

Evaluating ‘everything’ is not feasible, nor is it necessary. Critically consider what you want to reflect on in your project by asking yourself: What do I want to do with my findings? Why do I want to evaluate? Are there particular worries, theories, or questions that my organization or my partners are specifically interested in? Knowing why you want to reflect on something will keep you interested and invested during the evaluation process.

As a first step toward an evaluation plan, articulate your own goal. This statement will focus on why you want to evaluate (e.g. plan for a next exhibit; reaching new audiences; understand how you work toward your mission). Consider the following examples:

<table>
<thead>
<tr>
<th>Example 1: For a civic education project about race relations in Rhode Island, with the goal <strong>to reduce racist attitudes and misconceptions in Rhode Island</strong>, an evaluation goal might be:</th>
<th></th>
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</thead>
<tbody>
<tr>
<td>• I want to better understand the effectiveness of wrap-around programming that engages students, teachers, and administrators.</td>
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<tr>
<th>Example 2: For a documentary about local youth organizers, with the goal <strong>to increase civic agency of youth in Rhode Island</strong>, an evaluation goal might be:</th>
<th></th>
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<tbody>
<tr>
<td>• I want to better understand the the impact of my documentary film and its effect on local individuals and organizations connected to the subject matter.</td>
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<tr>
<th>Example 3: For a traveling exhibit about Pablo Neruda’s trip to Rhode Island, with the goal <strong>to increase Rhode Islander’s appreciation of bilingualism and celebrate Spanish-language poetry</strong>, an evaluation goal might be:</th>
<th></th>
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<tbody>
<tr>
<td>• I want to better understand my audiences in order to improve programmatic partnerships.</td>
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<tr>
<th>Example 4: For research on local musicians of color in Woonsocket with the goal <strong>to inspire new creative practices and create a historical basis for contemporary musicians of color in Northern Rhode Island</strong>, an evaluation goal might be:</th>
<th></th>
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<tbody>
<tr>
<td>• I want to better understand the impact of new research and public engagement methodologies on my work.</td>
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</table>

**TIP:** When creating your evaluation goal statements, consider using the structure provided above: “I want to know X, so that Y.” These statements function as a general guideline for your evaluation. In **STEP 3**, you will become more specific by establishing evaluation questions and indicators.
Who are the stakeholders and what are their stakes?

Your project has a lot of moving parts with different people involved. Even if you conduct individual historical research, you still collaborate with archivists, funders, community members and varied audiences. All these different stakeholders have an interest in the success of your project and insights to share. Reaching out to your stakeholders for evaluation shows that you value their input. This will only help to strengthen your relationship with them.

Think ahead about who you want to engage in evaluation and how they are best involved. Consider all of your project’s potential stakeholders: participants or audience members, community members, your staff, board, volunteers, partners and collaborators, humanities scholars, artists, and even funders.

What resources do you have? Be practical!

If you have not implemented evaluation in your projects before, it can seem daunting to add an extra task to your timeline. By planning for evaluation up front, you will know what to expect.

- Look at your resources carefully and ask yourself: what can I evaluate with what I have?
- Be realistic with how much time, money and labor you can put into evaluating your project.
- Decide who will be responsible. What does the expertise and support we have allow us to plan for?
- We encourage you to include a line item for evaluation in your budget.

And of course, you can always reach out to the Council for perspective; we do not want you to feel burdened by the task.
With the goal, outcomes, and outputs of your project on paper and your evaluation goal set, you can determine what you want to evaluate. We ask you to write **evaluation questions**, which will solidify the boundaries and scope of your evaluation plan. These questions are overarching and guide the evaluation plan, but they are not ones you would include in a survey or interview. **Ensure that the questions align with your project goal, outcomes, outputs, and evaluation goal.**

Simply ask yourself: **What do I want to evaluate? What is critically important to learn? What do I want to know this time next year that I don’t know today?**

You will probably have several evaluation questions; they should be answerable. Importantly, both you and your stakeholders should be interested in the answers. As always, it’s critical to be feasible in your expectations and considerate of the resources required to answer the questions. Example evaluation questions are below.

### Example 1:
For a civic education project about race relations in Rhode Island, with the goal **to reduce racist attitudes and misconceptions in Rhode Island**, evaluation questions might be:

- Was there evidence of an increase of change in knowledge about racism as a result of taking part in this program? For which participants: students, school administration, and anti-racism organizations?
- What was the value of participation in our program for the students?
- What were the particular parts of our project that made a difference in the school as a whole?

### Example 2:
For a documentary about local youth organizers, with the goal **to increase civic agency of youth in Rhode Island**, evaluation questions might be:

- What audiences did we reach, and was it as intended?
- What particular features of our project (guidebook, documentary screenings, panel) made the biggest impact?
- What was the value of participation in this project for the local youth organizers?

### Example 3:
For a traveling exhibit about Pablo Neruda’s trip to Rhode Island, with the goal **to increase Rhode Islander’s appreciation of bilingualism and celebrate Spanish-language poetry**, evaluation questions might be:

- What particular features of our project were effective for libraries? What features were important to the audience? What features made a difference for bilingual speakers?
- What lessons can we draw from collaborating with libraries and workshop facilitators?
- What did collaborating libraries learn from involvement in our project?

### Example 4:
For research on local musicians of color in Woonsocket with the goal **to inspire new creative practices and create a historical basis for contemporary musicians of color in Northern Rhode Island**, evaluation questions might be:

- What audiences did we reach?
- Is there any evidence of an increase in knowledge of local musicians of color in Woonsocket?
- What aspect of the project was particularly important?
- How did our project change the perceived narrative of local history in Woonsocket?

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**TIP:** Take a look at the complete example document in Appendix 1.
**Evaluation Indicators**

Now that you know what you want to achieve with your project, and what you want to measure with your evaluation plan, the next step is deciding which results indicate your project’s success. *Indicators are the ways you measure progress,* thereby demonstrating you achieved your project outcomes. With indicators, the more exact you can get, the easier it is to analyze your findings.

**Example 1:** For a civic education project about race relations in Rhode Island, with the goal to *reduce racist attitudes and misconceptions in Rhode Island*, indicators might be:

- 70 students read and reflect on the effects and racial problems of mass incarceration as discussed in *The New Jim Crow*.
- 70 students are introduced to four different anti-racism organizations doing work in their communities.
- 70 students attend a direct-action workshop. Two local multicultural organizations meet with the school at least once after the program has ended.
- Instances of insensitive comments, hate language, and confrontations rooted in race-based misconceptions are reduced in school.

**Example 2:** For a documentary about local youth organizers, with the goal to *increase civic agency of youth in Rhode Island*, indicators might be:

- Documentary film is finished by the set deadline; portrayed youth express excitement about the finished product.
- Three different local high schools host public screenings, each with at least 35 people attending.
- Within the six months after the first screening, the portrayed youth organizations experience an increase of people signing up or following their websites by three-times the normal rate.
- Youth organizers agree to sit on a panel with two politicians discussing local politics. 100 people attend the panel.

**Example 3:** For a traveling exhibit about Pablo Neruda’s trip to Rhode Island, with the goal to *increase Rhode Islander’s appreciation of bilingualism and celebrate Spanish-language poetry*, indicators might be:

- Three libraries host the exhibit, with 500 people visiting in total.
- 10 people perform at an open mic for readings of English and Spanish poetry, 75 people attend.
- Create Spanish-language acquisition guides for libraries and distribute to three local libraries. Have follow up meetings with all libraries.

**Example 4:** For research on local musicians of color in Woonsocket with the goal to *inspire new creative practices and create a historical basis for contemporary musicians of color in Northern Rhode Island*, indicators might be:

- Write and publish an article about musicians of color in Woonsocket that has a run of 500 copies.
- Host a public lecture in partnership with the Woonsocket Historical Society, with 80 attendees. 25% of attendees indicate never having attended a WHS event before.
- Invite three local musicians to play music composed by the researched musicians at the lecture. Hand out 25 free copies of the composition.
- During the research process, publish three columns in “The Call.”

**TIP:** See Appendix 2 for a list that includes useful examples of standardized indicators for youth development, performance art, and after-school programming. If you have any questions about what could indicate a specific change instigated by your project, the Council’s staff may be able to help.
Choose Your Evaluation Methods

Now that you know what your evaluation goal is, and what you want to measure, it’s time to select your evaluation methods.

Rather than pointing out the best evaluation methods, we want to share the process of how you can come to decide on methods of evaluation yourself. The following table includes some evaluation methods that are relevant to public humanities projects, and provides information to consider. With each method, it is important to consider other factors that might account for the change you are measuring. In other words, your project is not the only change instigator.

Don’t forget to decide up front who will be in charge of collecting and keeping track of the data. Maintaining an organized system will help you once it is time for analyzing and sharing what you accomplished!

<table>
<thead>
<tr>
<th>Method</th>
<th>Measures/Collects</th>
<th>Useful for</th>
<th>Consider</th>
<th>Resources</th>
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<tbody>
<tr>
<td>Participant or Audience</td>
<td>• Self-indicated change of behavior or knowledge - short term.</td>
<td>• Public projects: exhibits, lectures, one-time events</td>
<td>• Handing out a survey right after your project, or sending out emails with an online survey afterward.</td>
<td>• How to make a survey that measures a change in behavior.</td>
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<tr>
<td>Surveys</td>
<td>• Demographic data</td>
<td>• Civic education projects: workshops, lesson series, guest lecture, field trip</td>
<td>• When you are mainly interested in the long-term effects and knowledge, consider sending the survey, or calling participants with survey questions, after a couple of weeks.</td>
<td>This Reading Agency Toolkit includes extensive examples of survey questions connected to project outcome statements.</td>
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<td></td>
<td></td>
<td>• Documentary: public screening, pre-screen event</td>
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<td>This website provides an overview of how to build a survey from the start.</td>
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<tr>
<td></td>
<td></td>
<td>• Research: public event</td>
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<tr>
<td>Pre-test/Post-test</td>
<td>• Measures changes in knowledge, skills, or behavior, by comparing answers of the same questions before and after completion or participation in the project.</td>
<td>• Civic education projects: workshops, lesson series, guest lecture, field trip</td>
<td>• These types of tests take up more time for the participants: it includes filling out a survey before and after taking part in the project. However, you are able to use the same survey questions for the pre- and post-test.</td>
<td>This is an example of a survey that was used for both pre- and post-assessment, measuring change in behavior.</td>
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<td></td>
<td>• Public projects: series of events with a consistent group of participants, youth programming</td>
<td>• When using this method, take into account other influences on the changes that you measure, outside of participating in your project.</td>
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<tr>
<td>Method</td>
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| Retrospective Post-then-Pre Design | • Measures self-reported changes in knowledge, skills or behavior, asking participants to determine what they learned from the project, looking back to their knowledge pre-participation | • Civic education projects: workshops, lesson series, guest lecture, field trip Public projects: series of events with a consistent group of participants | • It is very similar to the pre-post assessment but asks participants after completion of the project to compare their knowledge now to what they (think they) knew before. | • This document gives a helpful overview of retrospective post-then-pre design.  
• These are tips for designing questions for a post-then-pre test |
| Program/Event Observation     | • Implementation of project  
• Witness level of skill/ability, program practices, behaviors  
• Determine changes over time (in implementation or in behavior) | Any project with an event, or series with an indicated change in skill or ability as part of a:  
• Public program  
• Civic education project  
• Documentary project | • If you are involved in the running of the event or program, ask someone else to observe!  
• Make sure to discuss together what to look for when observing: look back at your evaluation questions and indicators! | • This document talks you through the merits and aspects of program observation.  
• The Activation Lab created an Observation Protocol. It is specifically made with informal science projects in mind, but it can be a helpful model. |
| Interviews                    | • Detailed descriptions of project’s processes  
• Personal understanding of effect of project, by participants, staff, and other stakeholders | • Public projects: participants, audience, collaborators, volunteers, staff  
• Civic education projects: students/participants, teachers, administrators, partners  
• Documentary: viewers, subjects, collaborators  
• Research: audience, archivists, partners | • Can be conducted in person or over the phone.  
• Consider recording the interviews on video.  
• Questions are often open-ended, and answers are anecdotal or descriptive. You can conduct a structured or unstructured interview. | • Don’t know where to start? Consider this overview about conducting interviews.  
• BetterEvaluation has a very extensive online overview of what to consider when conducting interviews for evaluative measures. |
| Document or Records Review    | • Basic data on number of participants or the costs  
• Attendance rate change over time (if applicable)  
• Implementation of project | • Public projects  
• Civic education projects  
• Documentary  
• Research | • Documents to include in your review: grant applications, meeting notes, ticket sales, attendance records, outreach materials, and financial records. | • Here is an ‘evaluation brief’ on Document Review, explaining when to use it. |
<table>
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<tr>
<td><strong>Focus Groups</strong></td>
<td>• Perceptions, views, anecdotes, and opinions about your project or about the implementation process</td>
<td>• Public projects: participants, audience, collaborators, volunteers, staff</td>
<td>• Consider placing together people with a similar investment or role in your project: participants, volunteers, and staff.</td>
<td>• These are some quick tips about how to organize focus groups.</td>
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<td>• Civic education projects: students/participants, teachers, administrators, partners</td>
<td>• In 1.5 hours you can generally expect to address 5-7 questions.</td>
<td>• This document by the Applied Research Center gives some very concrete tips on how to conduct focus groups.</td>
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<td>• Documentary: viewers, subjects, collaborators</td>
<td>• Consider how you can compensate the participants for their time! Limit participation to groups of 6-10 people.</td>
<td>• This is a step-by-step guide for designing and facilitating a focus group, by Richard Krueger.</td>
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<td>• Research: audience, archivists, partners</td>
<td>• Consider using a journal for a public humanities project that aims to teach a certain skill or knowledge: invite participants to reflect on their learning. If participants in your project create and accumulate certain products consider reviewing participants’ portfolios</td>
<td>• This document gives facilitation strategies for leading stakeholders in a focus group.</td>
</tr>
<tr>
<td><strong>Journals or Portfolios</strong></td>
<td>• Skill, knowledge, or thought development</td>
<td>Program with regular participants:</td>
<td>• If you have any questions about using portfolios as an assessment tool, take a look here.</td>
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<tr>
<td></td>
<td>• Self-reflective tool</td>
<td>• Public projects</td>
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<td></td>
<td></td>
<td>• Civic education</td>
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**TIP:** Reference Appendix 1 for examples of evaluation methods relevant to sample projects. Take a look at Appendix 2 for a resource list of evaluation methods and tools.
Step 4 - Analyze Data and Communicate Impact

After you have collected all the information you need through your evaluation methods it is time to make sense of it all. Here, we lay out options for you to share the results of your evaluation with your various stakeholders: your participants, funders, volunteers, and partners. We also provide questions to help you consider what to do with the findings within your organization.

What to share with whom:

People are interested in your findings! Sharing evaluation results can help raise awareness of public humanities initiatives, they help attract volunteers and participants, and can be included in larger advocacy efforts for policy or political change.

Depending on your stakeholders’ stake, there are several ways you can share findings with them. Ask your stakeholders what methods of communication and scope of reporting are preferred. Your board might want to hear an extensive report, but your event volunteers prefer a more distilled version of your evaluation. Preferably, all these stakeholders have been included in your evaluation as well.

Some ideas for sharing your findings:

- Share a written report with your funders. The Council has a format for your final report and encourages you to base the report on your findings. Most likely, your other funders have formats they would like you to use.
- Depending on the preferences of your board, consider preparing a written report with an executive summary or a verbal presentation of your most important findings. Schedule time to discuss your findings in depth.
- Naturally, your staff has a large interest in your findings, and hopefully they have been involved in evaluating the project. Consider keeping them updated on your findings throughout the course of your project, and prepare a presentation with ample time for discussion once you have completed your evaluation. Take a look at the next page for guidelines on such a meeting with your staff.
- A distilled version or important aspect of your findings can easily be shared with your volunteers. A thank you note becomes all the more interesting with an anecdote from a participant!
- It is very likely that participants, audience members, or readers have participated in your evaluation. Consider sharing the most important findings, either in a final meeting or via email. Summarize the evaluation in a letter to the participants or, if possible, use graphs or tables to bring across the significant results.
- Make sure that your collaborators receive a summary of the findings as well, especially findings that are relevant to their role in the project.
- Write up your findings in a post on your website or highlight them in your newsletter. In that way, you will reach community members that might not have participated but are still invested in your success.
- Anecdotes and explicit data can be used in your fundraising efforts, either in your letters of appeal or in grant applications.
- In general, quotes, graphs and anecdotes are great marketing tools for communications!
- You might also consider sharing your findings with colleagues in other organizations, with local politicians for advocacy efforts, or with businesses for future partnership or sponsorship.
How to use your findings for your organization:

Using your findings to tell the story of your project is very important, but it is crucial to decide: What's next? Get your board, staff, volunteers or committee together and consider the following points:

1. **Ask orienting questions, ensuring everyone is on the same page:**
   - What do we see in our evaluation? What do the findings say?
   - Was it what we expected? How is it different or the same?
   - How does it compare to earlier findings or similar projects?

2. **Ask about the meaning of your findings. Have everyone consider:**
   - What do the findings say about our project? Did we succeed with our set indicators? Why or why not?
   - What do the findings say about our set goals and outcomes - were they attainable, did they fit our project? Did the indicators measure what we wanted to know?
   - How did we work together? Did the implementation of the project go as planned?

3. **Direct the Conversation. Discuss next steps:**
   - How should we budget for our next project? What were the gaps in our resources, or what was unnecessarily allocated?
   - What extra training or resources do we need for our next project? Do we need training or technological assistance or advancement? Where can we find that?
   - How can we better evaluate next time?
   - What should we change about our project implementation?
   - What part of our goal or mission did we not address in our project, this time?
CONCLUDING THOUGHTS

You made it!

This document provides a strong foundation for the evaluation of your Council-funded project, as well as your other funding pursuits. Of course, the Council’s staff is here as a resource for you should you have further questions.

Want more?

The information we provide in this evaluation toolkit is our condensed approach to the extensive field of evaluation research. We based what is represented here on a mix of outcome, summative, and formative evaluation: what we think are the most straightforward ways to evaluate public humanities projects. If you are interested in learning more about these and other evaluation methods, or in doing further research into evaluation yourself, see the resources provided in Appendix 2.

CREDITS AND THANKS

Special thanks to Rachael Jeffers, Cathy Saunders, and Touba Ghadessi for their time, consideration, and support. Thank you to Bill Harley for inspiring this work and to SueEllen Kroll for getting us started. We truly appreciate the feedback provided by Council grantees throughout this process. Finally, we’re especially indebted to Inge Zwart for undertaking this project as part of her graduate student work at Brown University’s John Nicholas Brown Center for Public Humanities and Cultural Heritage.

Logan Hinderliter, Associate Director, Grants and Partnerships
### Evaluation Plan - Civic Education

**PROJECT:** Schoolwide civic education project about race relations in Rhode Island

<table>
<thead>
<tr>
<th><strong>PROJECT GOAL</strong></th>
<th>• To reduce racist attitudes and misconceptions in Rhode Island</th>
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</thead>
</table>
| **OUTCOMES**     | • Students’ knowledge of systemic and historic racism in the nation and state is increased.  
                  • Students’ capacity to stand up against racism on an individual, community, and national level is strengthened.  
                  • The school increases relationships with local organizations whose mission is aligned with the project goal. |
| **OUTPUTS**      | • Produce high school curriculum for the book The New Jim Crow.  
                  • Host four guest lectures led by local multicultural organizations.  
                  • Organize a direct action workshop at the school with a local organization.  
                  • Set up post-grant meetings with local organizations and the school. |
| **EVALUATION GOAL** | • I want to better understand the effectiveness of wrap-around programming that engages students, teachers, and administrators. |
| **EVALUATION QUESTIONS** | • Was there evidence of an increase or change in knowledge about racism as a result of taking part in this program? For which participants: students, school administration and anti-racism organizations?  
                           • What was the value of participation in our program for the students?  
                           • What were the particular parts of our project that made a difference in the school as a whole? |
| **INDICATORS**   | • 70 students read and reflect on the effects and racialized problems of mass incarceration as discussed in The New Jim Crow.  
                  • 70 students are introduced to four different anti-racism organizations doing work in their communities.  
                  • 70 students attend a direct-action workshop.  
                  • Two multicultural organizations meet with the school at least once after the program has ended.  
                  • Instances of insensitive comments, hate language, and confrontations rooted in race-based misconceptions are reduced in school. |
| **EVALUATION METHODS** | • I will make use of observation methods, interviews, and retrospective post-then-pre design assessments. |
### Evaluation Plan – Documentary Film

**PROJECT:** Documentary film featuring local youth organizers in Providence

<table>
<thead>
<tr>
<th><strong>PROJECT GOAL</strong></th>
<th>To increase civic agency of youth in Rhode Island</th>
</tr>
</thead>
</table>
| **OUTCOMES**     | - Public knowledge about local youth organizers is increased.  
                  - Young activists in Rhode Island are empowered to continue their work.  
                  - Youth interest in participating in political events and afterschool programs is increased. |
| **OUTPUTS**      | - Produce a documentary film.  
                  - Host three public screenings at local high schools.  
                  - Create direct action guides to distribute at screenings.  
                  - Host one public panel about local politics and youth engagement. |

**EVALUATION GOAL**
- I want to better understand the impact of my documentary film and its effect on local individuals and organizations connected to the subject matter.

**EVALUATION QUESTIONS**
- What audiences did we reach, and was it as intended?  
- What particular features of our project (guidebook, documentary screenings, panel) made the biggest impact?  
- What was the value of participation in this project for the local youth organizers?

**INDICATORS**
- Documentary film is finished by the set deadline; portrayed youth express excitement about the finished product.  
- Three different local high schools host public screenings, each with at least 35 people attending.  
- Within the six months after the first screening, the portrayed youth organizations experience an increase of people signing up or following their websites by three times the normal rate.  
- Youth organizers agree to sit on a panel with two politicians discussing local politics. 100 people attend the panel.

**EVALUATION METHODS**
- I will make use of surveys, interviews, and event observations.
**Evaluation Plan – Public Program**

**Project**: Traveling exhibit about Pablo Neruda’s trip to Rhode Island

<table>
<thead>
<tr>
<th><strong>Project Goal</strong></th>
<th>• To increase Rhode Islander’s appreciation of bilingualism and celebrate Spanish-language poetry</th>
</tr>
</thead>
</table>
| **Outcomes**     | • Rhode Islanders’ knowledge of and engagement with Spanish-language poetry is increased.  
• More bilingual speakers in Rhode Island are empowered to do public speaking.  
• Awareness of and respect for bilingual speakers in Rhode Island is increased.  
• Knowledge of translation work and practice is increased.  
• Spanish language collections in local libraries are expanded. |
| **Outputs**      | • Produce a traveling exhibit.  
• Host three translation workshops at libraries.  
• Organize an open mic for readings of English and Spanish poetry.  
• Create Spanish-language acquisition guides for libraries. |
| **Evaluation Goal** | • I want to better understand my audiences in order to improve programmatic partnerships. |
| **Evaluation Questions** | • What particular features of our project were effective for libraries? What features were important to the audience? What features made a difference for bilingual speakers?  
• What lessons can we draw from collaborating with libraries and workshop facilitators?  
• What did collaborating libraries learn from involvement in our project? |
| **Indicators**   | • Three libraries host the exhibit, with 500 people visiting in total.  
• 10 people perform at an open mic for readings of English and Spanish poetry, 75 people attend.  
• Create Spanish-language acquisition guides for libraries and distribute to three local libraries. Have follow up meetings with all libraries. |
| **Evaluation Methods** | • I will make use of surveys, focus groups, and observation to collect evaluative data. |
## Evaluation Plan – Individual Research

**PROJECT: Research on local musicians of color in Woonsocket**

<table>
<thead>
<tr>
<th><strong>PROJECT GOAL</strong></th>
<th>To inspire new creative practices and create a historical basis for contemporary musicians of color in Northern Rhode Island</th>
</tr>
</thead>
</table>
| **OUTCOMES**     | Expand and diversify Woonsocket historical narratives  
|                  | Increase public knowledge of local music and interest in composing in local historical traditions.  
|                  | Engage new audiences with local Woonsocket history. |
| **OUTPUTS**      | Write and publish an article about musicians of color in Woonsocket.  
|                  | Host a public lecture in partnership with Woonsocket Historical Society.  
|                  | Invite three local musicians to play music composed by the researched musicians  
|                  | Publish columns in “The Call” about the research process. |

| **EVALUATION GOAL** | I want to better understand the impact of new research and public engagement methodologies on my work. |

| **EVALUATION QUESTIONS** | What audiences did we reach?  
|                         | Is there any evidence for an increase in knowledge of local musicians of color in Woonsocket? What aspect of the project was particularly important?  
|                         | How did our project change the perceived narrative of local history in Woonsocket? |

| **INDICATORS** | Write and publish an article about musicians of color in Woonsocket that has a run of 500 copies.  
|                | Host a public lecture in partnership with Woonsocket Historical Society (WHS), with 80 attendees. 25% of attendees indicate never having attended a WHS event before.  
|                | Invite three local musicians to play music composed by the researched musicians, at the lecture. Hand out 25 free copies of the composition.  
|                | During the research process, publish three columns in “The Call.” |

| **EVALUATION METHODS** | I will make use of online analytics data, a personal research journal, and observation methods. |
# Appendix 2: Resource List

<table>
<thead>
<tr>
<th>Resource</th>
<th>URL</th>
<th>Content Area</th>
</tr>
</thead>
<tbody>
<tr>
<td>How Do We Select the Right Evaluation Approach for the Job: This downloadable pdf from Grantmakers for Effective Organizations offers a matrix to guide thinking about evaluation and what tools and methods to use.</td>
<td><a href="https://www.geofunders.org/resources/how-do-we-select-the-right-evaluation-approach-for-the-job-665">https://www.geofunders.org/resources/how-do-we-select-the-right-evaluation-approach-for-the-job-665</a></td>
<td>Any</td>
</tr>
<tr>
<td>Institute of Museum and Library Services Evaluation Resources: This IMLS resource includes program planning tools, evaluation definitions, methodologies, and a tutorial on evaluation design.</td>
<td><a href="https://www.imls.gov/research-evaluation/evaluation-resources">https://www.imls.gov/research-evaluation/evaluation-resources</a></td>
<td>Museums, Libraries, and Cultural Institutions</td>
</tr>
<tr>
<td>Program Development and Evaluation at University of Wisconsin-Extension: This resource has templates, tutorials, and ‘quick tips’ about many aspects of evaluation.</td>
<td><a href="https://fyi.uwex.edu/programdevelopment/">https://fyi.uwex.edu/programdevelopment/</a></td>
<td>Any</td>
</tr>
</tbody>
</table>

**Key to Chart Headers**

<p>| Program Design &amp; Logic Models | These resources help you think about the design of your project and how to use logic models to inform your process. |
| Evaluation Planning          | Evaluation is easier and more effective if it is carefully planned. These resources will walk you through the steps of creating an evaluation plan. |
| Indicators &amp; Outcomes        | Need help selecting indicators that will measure progress? Want to better understand how to set attainable and measurable outcomes for your project? These resources will help you. |
| Data Collection Instruments  | These sites have samples of surveys (and other instruments) as well as tips for creating your own. |
| Evaluation Results           | Want to see what other people have done in your area of interest? A number of sites public studies (evaluation results) from their projects. |</p>
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<tr>
<th>Resource</th>
<th>URL</th>
<th>Content Area</th>
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</thead>
<tbody>
<tr>
<td>Humanities Indicators: The American Academy of Arts &amp; Sciences provides overviews of humanities data in the United States. This resource is helpful for further reference, advocacy, and placing your project and evaluation in a national context.</td>
<td><a href="http://www.humanitiesindicators.org/default.aspx">http://www.humanitiesindicators.org/default.aspx</a></td>
<td>Humanities</td>
</tr>
<tr>
<td>IssueLab: This collection of free research from social sector organizations around the world is compiled by the Foundation Center. The “Measure Results Collection” has reports on Evaluation Planning.</td>
<td><a href="https://www.issuelab.org/">https://www.issuelab.org/</a></td>
<td>Arts/Culture, Education, Judicial Reform, Race/Ethnicity, etc.</td>
</tr>
<tr>
<td>Evaluating Participatory Projects: This chapter from “The Participatory Museum” addresses the unique considerations of evaluating process and results of projects, where participants are actively engaged in contributing ideas and objects.</td>
<td><a href="http://www.participatorymuseum.org/chapter10/">http://www.participatorymuseum.org/chapter10/</a></td>
<td>Community Participation Projects</td>
</tr>
<tr>
<td>CIRCLE Tools for Practice: Center for Information and Research on Civic Learning and Engagement (CIRCLE) has extensive resources about evaluating civic engagement.</td>
<td><a href="http://civicyouth.org/tools-for-practice/">http://civicyouth.org/tools-for-practice/</a></td>
<td>Civic Engagement, Youth</td>
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</table>
### Appendix 2: Resource List Cont’d.

<table>
<thead>
<tr>
<th>Resource</th>
<th>URL</th>
<th>Content Area</th>
<th>Program Design &amp; Logic Models</th>
<th>Evaluation Planning</th>
<th>Indicators &amp; Outcomes</th>
<th>Data Collection Instruments</th>
<th>Evaluation Results</th>
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</thead>
<tbody>
<tr>
<td><strong>Informal Science</strong>: This searchable database of project, research, and evaluation resources is designed to support the informal STEM education community in a variety of learning environments. In the search tool, select “Resource Type” to find research and evaluation resources.</td>
<td><a href="http://www.informalscience.org/">http://www.informalscience.org/</a></td>
<td>STEAM</td>
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<tr>
<td><strong>From Soft Skills to Hard Data: Measuring Youth Outcomes</strong>: The Forum for Youth Investment has published 10 instruments on how to measure youth development.</td>
<td><a href="http://forumfyi.org/files/soft_skills_hard_data_single.pdf">http://forumfyi.org/files/soft_skills_hard_data_single.pdf</a></td>
<td>Youth</td>
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<td><strong>PerformWell</strong>: Developed by the Urban Institute, Child Trends, and Social Solutions, this resource provides measurement tools and practical knowledge that human services professionals can use to manage their programs’ day-to-day performance.</td>
<td><a href="http://www.performwell.org">http://www.performwell.org</a></td>
<td>Child &amp; Youth Development, Civic Engagement</td>
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<tr>
<td><strong>Rhode Island Program Quality Assessment Tool (RIPQA)</strong>: Providence After School Alliance uses this tool to assess after-school programs.</td>
<td><a href="https://www.edutopia.org/pdfs/PASA/edutopia-PASA-lesson4-RIPQA.pdf">https://www.edutopia.org/pdfs/PASA/edutopia-PASA-lesson4-RIPQA.pdf</a></td>
<td>Afterschool</td>
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<tr>
<td><strong>Museum Exhibit Design – Evaluation</strong>: This resource gives a brief overview of considerations for evaluating exhibits.</td>
<td><a href="https://museumplanner.org/museum-exhibition-design-part-vi/">https://museumplanner.org/museum-exhibition-design-part-vi/</a></td>
<td>Exhibits</td>
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**Online Survey Tools:**
- [Google Forms](http://www.informalscience.org/)
- [SurveyMonkey](http://forumfyi.org/files/soft_skills_hard_data_single.pdf)
- [SurveyGizmo](http://www.performwell.org)
- [Qualtrics](https://www.edutopia.org/pdfs/PASA/edutopia-PASA-lesson4-RIPQA.pdf)
- [Questionpro](http://omec.uab.cat/Documentos/com_desenvolupament/0151.pdf)
- [Online Survey Tools](https://museumplanner.org/museum-exhibition-design-part-vi/)
Find the EVALUATION TOOLKIT Supplemental Action Plan and Worksheet at rihumanities.org/grantmaking.

Questions? Contact Council staff at 401-273-2250