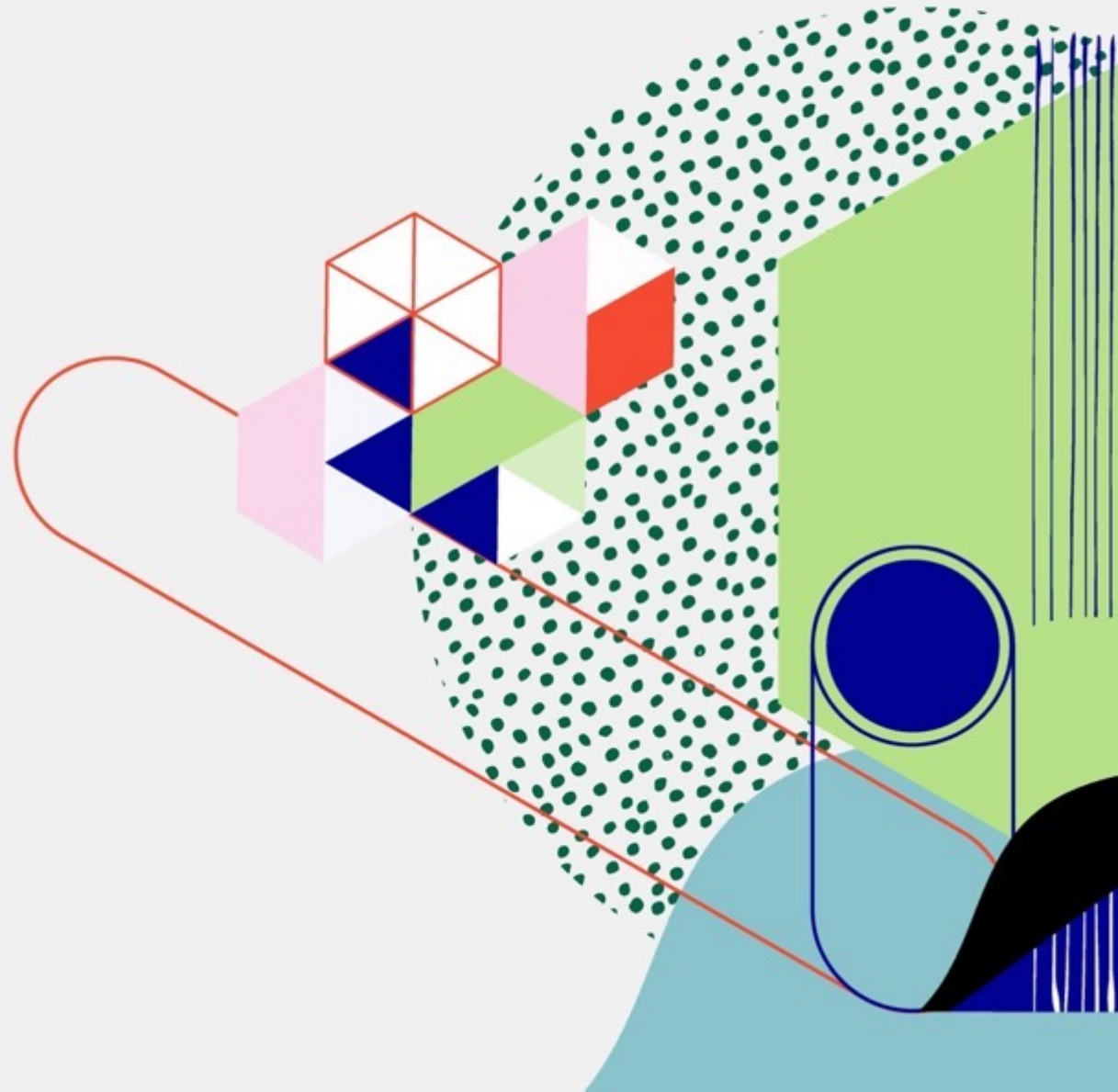# PATTERNMAKERS

Data Culture 101:
The what, how and why of evaluation in the arts

Tandi Palmer Williams

May 2023

What we'll cover

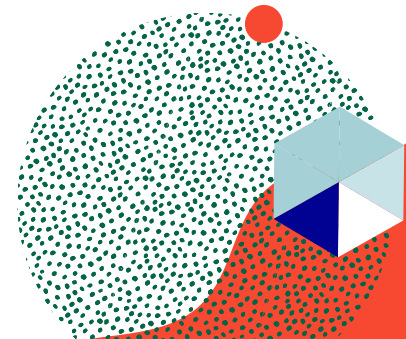1. A little background

2. Why evaluate?

3. Applying evaluation in arts management

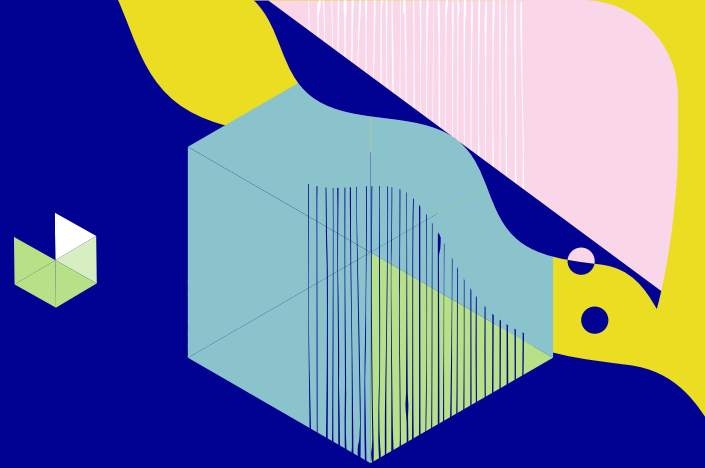4. Evaluation frameworks

5. Resources

6. Collecting data

My goal is to leave you with insight into research in arts management...

and ultimately to help our sector build a strong, ethical, creative **data culture**.

A little background

1.

Patternmakers was founded in 2016 to support growth of a strong and vibrant data culture in the arts and creative industries

If you're going to change the world, you need powerful insights.

Patternmakers is a research agency that leverages data for the greater good. We're here for big ideas, bolder creativity and connected communities.

What is evaluation?

Evaluation is a systematic and intentional process of gathering and analysing data (quantitative and qualitative), to inform learning, decision-making and action.

Why evaluate?

2.

Evaluating the impact of schools touring

Terrapin

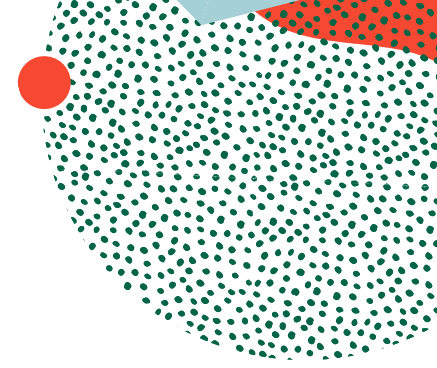Unlimited Commissions Program (UK)

Impact Evaluation: Making A Difference?

Australian Theatre for Young People

The Power of Youth Arts: A Review of the Evidence

Artists and organisations that include evaluation in their work…

- Can get more in tune with more parts of their audience and community – including those less engaged
- Can be bold in asking questions… and ready themselves to hear answers they aren't expecting
- Genuinely want to know if they are making a difference… and how they can do better
- Generate goodwill with their audience by actioning the feedback they get
- Grow more and more confident in their role and value – and recognised for their achievements
- Attract in-bound opportunities for their community, their organisation and their staff members

- Have good relationships with funders and find it easier to develop great funding application
- Find reporting easier and more useful
- Achieve their goals, in less time
- Create more and more good in the world.

According to 'Our Community':

- A program that is properly evaluated gives twice: first, in the impact it has, and second, in making it possible for you - and others - to do better next time.
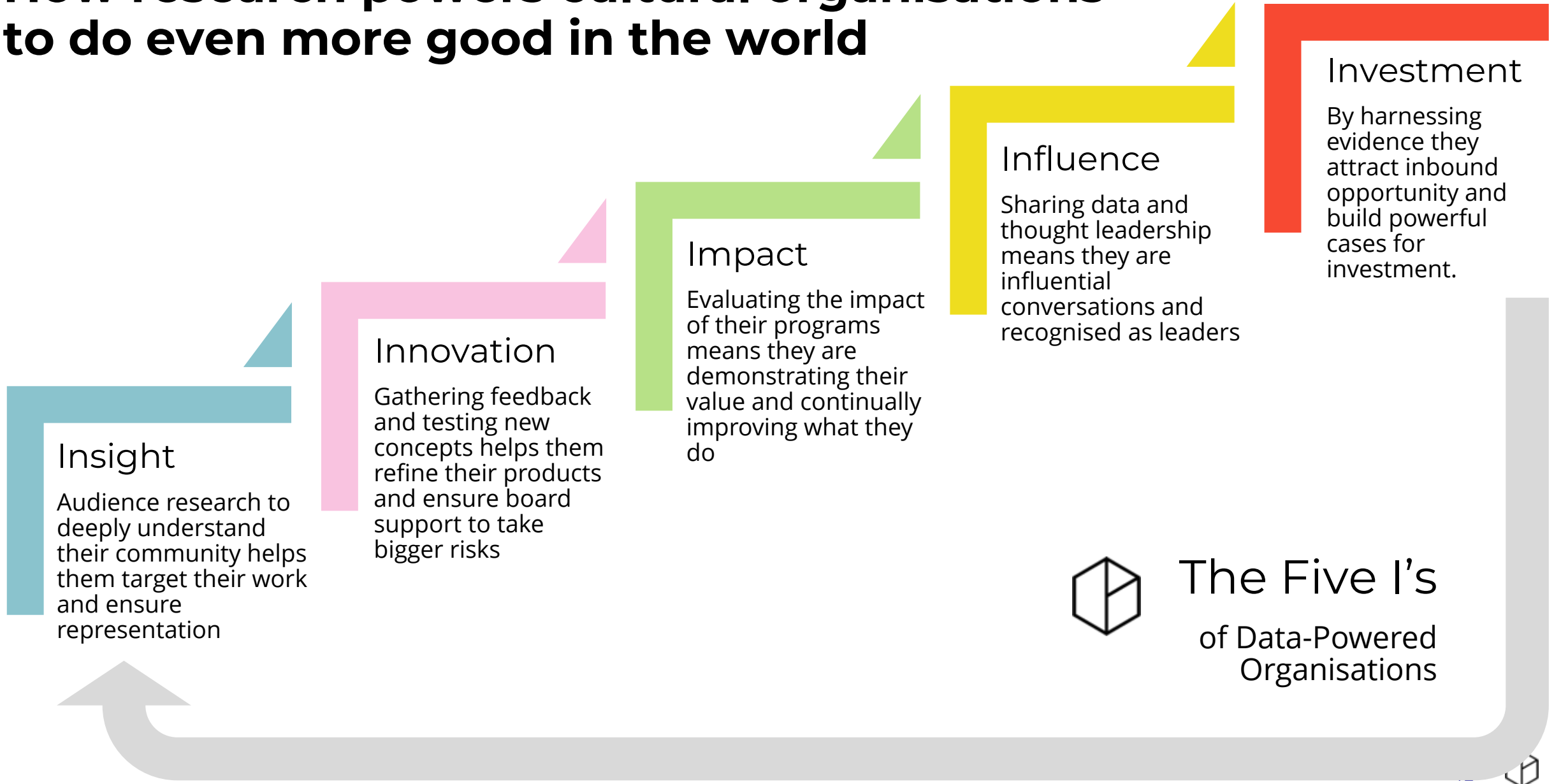
Applying evaluation in arts management

3.

How research powers cultural organisations to do even more good in the world

Insight
Audience research to deeply understand their community helps them target their work and ensure representation

Innovation
Gathering feedback and testing new concepts helps them refine their products and ensure board support to take bigger risks

Impact
Evaluating the impact of their programs means they are demonstrating their value and continually improving what they do

Influence
Sharing data and thought leadership means they are influential conversations and recognised as leaders

Investment
By harnessing evidence they attract inbound opportunity and build powerful cases for investment.

The Five I's
of Data-Powered Organisations

Expectations for evaluation and outcomes measurement are growing

According to the Institute of Community Directors:

‣ Outcomes measurement is an achievable and necessary activity for not-for-profits

‣ The process is now well-established and expected by many funders and government agencies

‣ They advise: 'Don't get lost in the definitions: get started and learn along the way'

‣ There are risks for organisations that fail to measure outcomes and rewards for those that do

‣ Best-practice practitioners should aim to allocate 10–20% of their program budget to outcomes measurement

‣ Not-for-profits should seek to appoint a dedicated outcomes specialist or a staff member with time dedicated to the role

‣ Resources, training and peer support are available for organisations prepared to do their homework

6 challenges with evaluation in the arts, which can hold us back from growing our impact

The fact that some art is **simply about creating**, not about having an impact or causing an effect

We're rewarded for using big numbers or **'vanity metrics'** that make us look good, even though we know quality is more important than quantity

Many arts workers want and need to **focus on the creative aspects of their work**. Numbers and analysis simply isn't everyone's cup of tea.

We send out surveys when we know we **don't have time** to actually analyse the responses or use the data – and we fatigue our audiences

Building **evidence requires resources**, and a lack of resources has led to a lack of evidence, which in turn weakens the case for investment

Poorly incentivised surveys lead to skewed responses, creating an **'echo chamber'** with an inner circle of supporters

Ways to approach evaluation

WHY:

‣ Consider the rationale for you or your organisation to take on evaluation – and consider the risks

‣ Develop an evaluation framework for your work or organisation, to identify the 3-4 most important questions to ask, and how you will answer them

WHEN:

‣ Have a plan or roadmap for fulfilling the evaluation framework over time – e.g. taking on achievable but incremental steps each year ('little and often') or allocating a bigger investment once every 3/5/10 years ('big bang')

HOW:

‣ Build it into grant applications and add a line into project budgets – start with 3-5 %

‣ Identify resources (time, money and skills) and decide on a professional or DIY approach
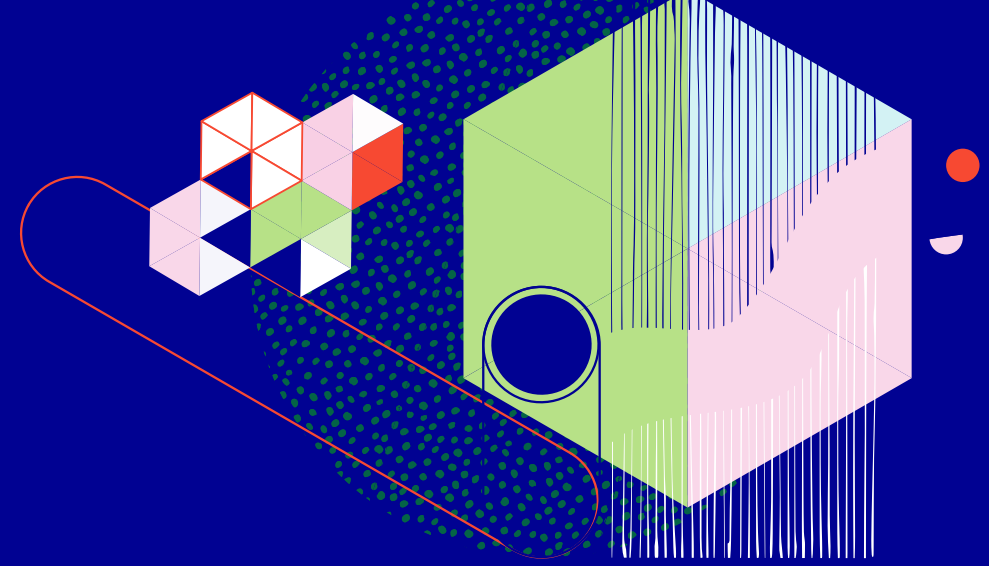
WHO:

‣ Identify one person who can lead and champion evaluation internally – schedule the professional development they need and make time for it in their workplan

‣ Connect with university and industry researchers – test ideas and explore possible ways of working

WHAT:

‣ Leverage existing data before collecting new info

‣ Pause, cancel or cut-down any non-essential surveying, review response rates and incentives, and choose your moment to survey very carefully

‣ Aim to collect a combination of qualitative and quantitative data, balancing statistics and stories

‣ Identify where bias could come in, and consider ways to minimize/mitigate or factor it into interpretation
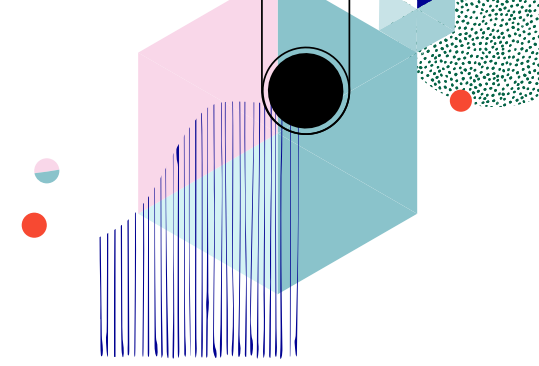
Evaluation frameworks

4.

It's important to use it strategically and proportionately, without burdening audiences and stakeholders

Good times:

‣ You're aiming for a step-change in your reach or impact

‣ Funding for your work is lapsing in the next 12 months – or you're looking for a new supporting partner

‣ You're trying something new (e.g. a pilot) and want to determine whether to continue

‣ Engagement levels are falling, failing to grow or have somehow not met expectations

‣ You're hearing whispers of discontent or people having negative (or mixed) experiences

‣ It's been three or more years since you've checked in with audiences or stakeholders formally

Bad times:

‣ You're totally occupied with delivering – e.g. in festival mode – or recovering from a distaster

‣ You don't have any big questions right now (things are going pretty well)

‣ You already have a lot of data - you haven't yet acted on previous research

‣ You're not really sure what you're going to use it for, or you don't have time to digest/apply it

‣ Your audiences and stakeholders are fatigued and it's not a good time to ask for their time.

TYPES OF EVALUATION

THE PROGRAMME LIFECYCLE

PROGRAMME STRATEGY SETTING → PROGRAMME DEVELOPMENT → PROGRAMME IMPLEMENTATION → PROGRAMME MONITORING → PROGRAMME COMPLETION

FORMATIVE EVALUATIONS | SUMMATIVE EVALUATIONS

	NEEDS ASSESSMENT	EVALUABILITY ASSESSMENT	PROCESS EVALUATION	ECONOMIC EVALUATION	OUTCOME EVALUATION
EVALUATION TYPES	Informs programme design by determining the needs of your population and strategies to meet those needs	Determines whether your programme is ready to be evaluated and/or whether the results of an evaluation will be useful	Assesses the implementation of your programme and determines opportunities to improve programme design or implementation	Determines how to allocate resources within or across programmes to maximise value for investment	Measures the degree to which your programme has met its short-term, mid-term, and long-term outcomes
WHEN TO CONDUCT	Prior to the development of your programme or any major programme decision	Prior to conducting an evaluation	Before and/or during the implementation or monitoring of your programme	After programme implementation	Several years (1 - 6) after the programme is implemented (number of years after varies depending on the programme)
WHAT IS CONSIDERED	» The met and unmet needs of your target population » Need prioritisation based on urgency and organisational resources » Specific strategies the programme can use to meet unmet needs	» Political and organisational interest in and intended uses of an evaluation » Feasibility based on available resources » Programme theory and lifecycle » Availability and quality of data to answer evaluation questions	» Barriers and facilitators to programme implementation » Programme progress, including activities and outputs » How a programme can be improved	» Cost-benefits » Cost-utility » Cost-effectiveness » Cost-minimisation » Cost-consequence	» Changes in participant attitudes, beliefs, and knowledge (shorter-term changes) » Changes in participant behaviour, capacity, and lifestyle (longer-term outcomes) » Changes in organisational processes, partnerships, and quality of programming

Source: https://www.greo.ca/en/types-of-evaluation.aspx

Not everything that can be counted counts, and not everything that counts can be counted.

(Said by someone very wise)

Theory of change

Issues	Activities	Outputs	Immediate outcomes	Intermediate outcomes	Ultimate outcomes
• Rates of drowning in Australia	• Summer program for kids • Games and competitions • BBQs and social events	• Bronze medallions • Events delivered • Media	• Fun • Learning new skills • Meeting people • Learning about the surf and how to spot risks	• Confident at the beach • Improve physical health • More time spent in nature	• A healthier population • More connected, more active population • Lower rates of drowning

Possibly evaluation questions:

* What actually participates in nippers – are some parts of the community missing out?

* How did nippers make you feel about water safety?

* What trends exist in drowning rates? Are they going down?

Common evaluation questions

‣ REACH – How many people are we reaching?

‣ ENGAGEMENT – What experiences are people having?

‣ IMPACT – What do people take away?

‣ IMPROVEMENT – What could be done better in future?

Recap: Ways to approach evaluation

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‣ Aim to collect a combination of qualitative and quantitative data, balancing statistics and stories

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Some resources

5.

The Arts + Social Impact Explorer from Americans for the Arts is a useful tool for sourcing evidence

AGING

As we grow older, we gain wisdom but often struggle with the loss of physical and cognitive abilities. The arts keep us vibrant by providing physical and mental stimulation, entertainment, and avenues for social interaction and connection.

LEARN MORE

Australia Council's electorate profiles collate a range of sources of insight relevant to specific regions of Australia

Electorate Profiles is an interactive tool providing data on arts and culture in each of Australia's 151 federal electorates.

Choose an electorate from the map or table to display information including audience engagement with the arts, ticket buying trends across arts and sport, and cultural and creative employment and businesses.
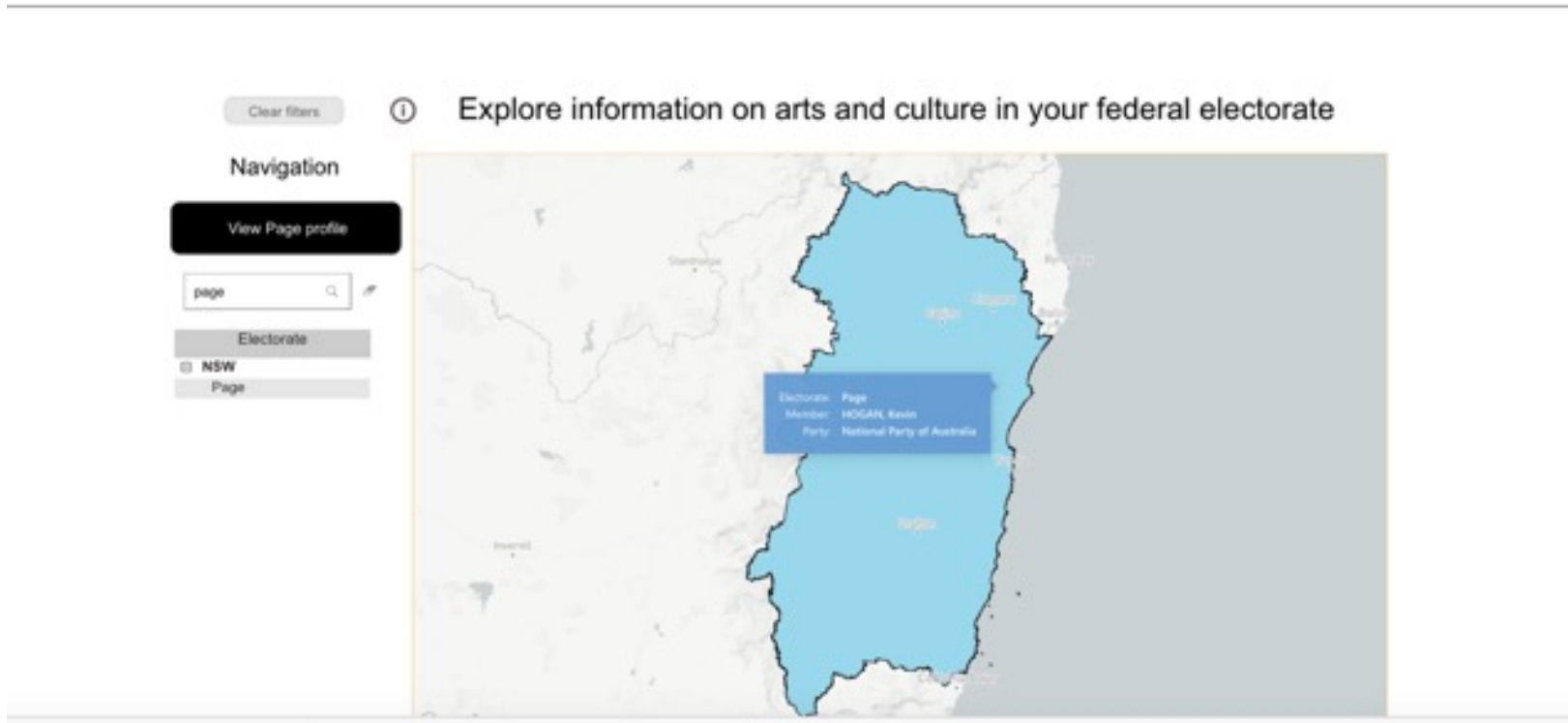
A series of social impact evaluation resources is available online from BYP Group for Creative Victoria

GUIDE

THE BASICS OF SOCIAL IMPACT EVALUATION

THE BASICS OF SOCIAL IMPACT EVALUATION

Resource 1

Creative Victoria Social Impact Program

2018

This guide gathers key approaches to evaluation of social impact. It covers topics including:

- What is social impact?

- How do you measure the social impact of creative industry interventions?

- Methods for developing an M&E framework

- Examples of indicator frameworks

- Tools for collecting data

Who is it for? Creative industry, arts and cultural professionals looking for an introduction to social impact evaluation.

The Australian Institute of Family Studies' Program Planning and Evaluation Guide is a best practice resource from outside the arts

Source: https://aifs.gov.au/resources/practice-guides/planning-evaluation

Creative Victoria's Audience Research Toolkit is a good resource for data collection tools (e.g. survey templates)

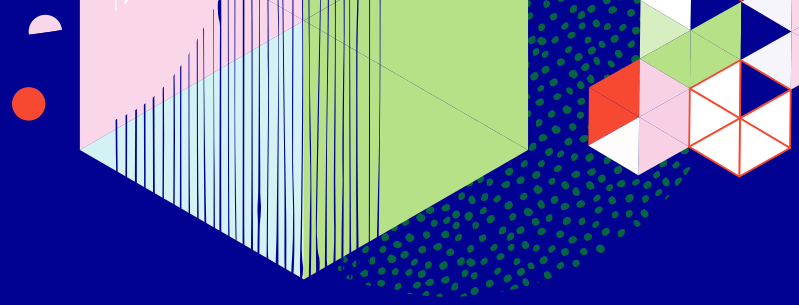# Patternmakers Culture Insight & Innovation Updates – monthly newsletter with tools, resources and new research
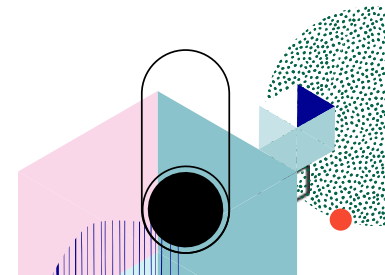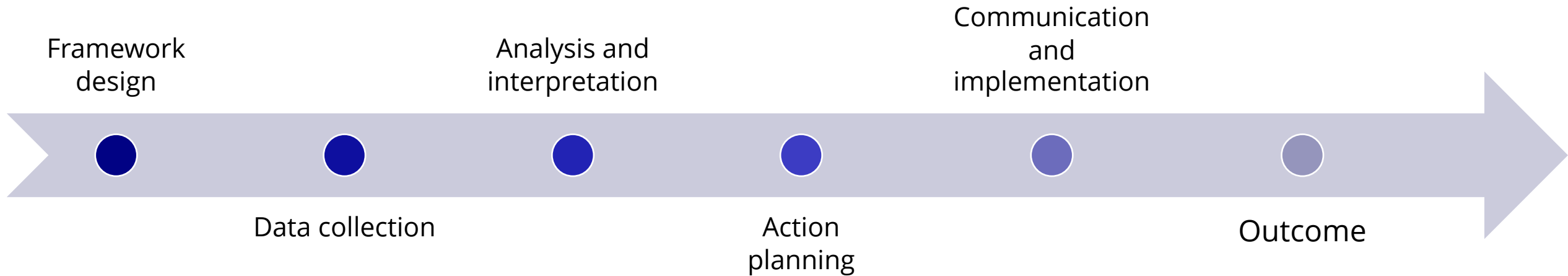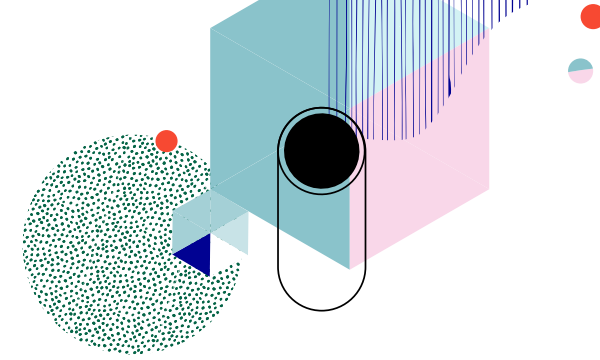
Collecting data

6.

Collecting data is just a small step in an effective research practice – the key is application

Process diagram: Data to Impact

When collecting data – remember your METRIQS!

‣ M: Motivation: Consider what incentives can help motivate balanced participation

‣ E: Execution: Think carefully about the right format, and how it can be accessible

‣ T: Timing: Carefully pick your timing to deliver results when you need them

‣ R: Reliability: Identify your population, structure your sample and calculate your margin of error

‣ I: Invitation: Craft a compelling email & subject line – think of it like running a campaign

‣ Q: Question design: Get a second opinion to ensure your questions aren't leading

‣ S: Stop: Pause, postpone and/or reduce your fieldwork if you're not getting value from it.

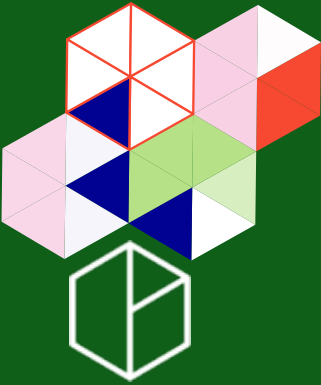What steps can we take to improve the visibility and value of our work?

It's not easy: The art of doing research and evaluation in creative contexts
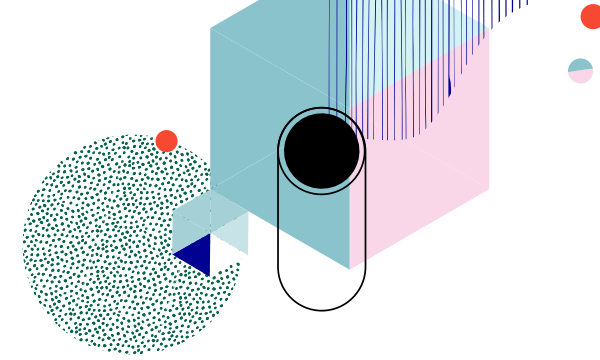
‣ Finding ways to do research and evaluation …. in the context of stretched resources

‣ Asking audiences what they want…. but giving them something they could never dream of

‣ Challenging conventional thinking… but respecting artistic decision-making

‣ Being analytical…. while thinking creatively

‣ Speaking the language of government… while being true to the art

‣ Celebrating positive results… and embracing areas of learning

‣ Demonstrating your value… while finding ways to deliver even more value

Questions?