

**“So, you want to do an  
evaluation?”**

# **Evaluation Planning 101**

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# Planning an Evaluation

## The 7 steps

1. Determine the purpose of the evaluation
2. Determine the target population
3. Determine data collection methods/instruments and sample size
4. Design and pretest the instrument
5. Devise a data collection plan
6. Determine your analysis strategy
7. Determine your reporting strategy

# Planning an Evaluation

The steps *you* need to think about

1. The purpose of the evaluation
2. Identifying the target population

# Planning an Evaluation

The steps the *evaluator* thinks about

3. Determining data collection methods, instruments, and sample size
4. Designing and pre-testing the instrument
5. Devising a data collection plan
6. Determining the analysis strategy
7. Determining the reporting strategy

# 1. Determining the Purpose

## Getting Ready for Evaluation by Thinking Evaluatively

What is the general purpose of this study?

What three problems/issues/concerns are paramount?

What are your expectations regarding this study? What do you want it to provide?

Who will use the information? How will they use the information?

# 1. Determining the Purpose

## Getting Ready for Evaluation by Thinking Evaluatively

How will this information help staff plan for the future?

Will this study provide staff with information they need to make decisions?

What will staff be doing differently once they have this information?

Suppose X% of visitor think X, Y, and Z? What will staff do?

Is the information you need available elsewhere?

# 1. Determining the Purpose for an Exhibition Evaluation

## Getting Ready for Evaluation by Thinking Evaluatively

How would you describe the most important message or theme of the exhibition?

How does each exhibit component contribute to this message?

What are the other finer points of the exhibition?

What does success look like, sound like?

# 1. Determining the Purpose for an Exhibition Evaluation

## Getting Ready for Evaluation by Thinking Evaluatively

What do you want to know about the public in relation to the exhibition?

Are there emotions you expect the public to experience?

What evidence do you need to indicate that visitors' experiences met the exhibition's objectives?

Are there parts of the exhibition that are for only one segment of the public?

# 1. Determining the Purpose for an Exhibition Evaluation

## Getting Ready for Evaluation by Thinking Evaluatively

Which parts of the exhibition (e.g., ideas, activities) must *not* change in spite of the public's response?

Which parts of the exhibition are more flexible and can be altered to improve the relationship between the public and the project?

## 2. Determining Your Target Population

### Thinking Evaluatively

Who is your primary audience?

Children 5-13 years?

Visitors 14 years and older?

Family groups?

This audience is called your *target population*.

### 3. Determining Data Collection Methods, Instruments, and Sample Size

**The evaluator will:**

Examine what you want to know, evaluation goals & objectives, and budgetary, time, and personnel constraints.

## 2. Determining Your Sample Size

**The evaluator will consider the following:**

The type of program and phase of program development (is it a formative evaluation or a summative evaluation?)

The purpose of the study

The data collection method(s)

How the data will be analyzed

## 2. Determining Your Sample Size

### Some examples:

Standardized questionnaire to which statistics will be applied:

400 respondents

Front-end evaluation using in-depth, open-ended interviews that will be audio recorded to which content analysis will be applied:

50 interviews

## 4. Design and Pretest the Instrument

### Why the evaluator needs to pretest?

Allows you to identify questions or instructions that are ambiguous.

Gives you the opportunity to be sure the instrument you designed is collecting the information you need.

## 5. Devise a Data Collection Plan

**The evaluator will:**

Design a *systematic* plan,

Design a data collection schedule that accounts for all the open hours of the museum

Train data collectors to be neutral and unbiased as they collect data

Design a “Plan B” if “Plan A” fails

## 6. Determine an Analysis Strategy

**The evaluator will:**

**Consider the type of data the instrument will produce and who will use the findings.**

Consult a statistician while designing the questionnaire and analyzing the findings if the instrument produces numerical data.

Make preparations for conducting a content analysis if the instrument produces descriptive or qualitative data.

## 7. Determine Your Reporting Strategy

**The evaluator will ask questions:**

Do you need a full, detailed written report?

Who will be reading the study? The funder, the board, fellow practitioners?

Will staff need an oral presentation, too?

Is the executive summary going to serve as “the report?”



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# Evaluation

## Definition

Evaluation is the systematic collection of information about a program—from the user's perspective—that identifies the successes and shortcomings of a program and examines them against stated goals and objectives.

Evaluation is the **systematic** collection of information about a program—from the user’s perspective—that examines the successes and shortcomings of the program against stated **goals and objectives.**

## What is a Goal?

- It relates, in some way, to the overall mission of the museum.
- It broadly describes what the program will do.
- It describes what the program is about, which delineates what will and will not be in the program.

*Goals are made concrete through the development of objectives.*

## What is an Objective?

Describes precisely what will be achieved—from the user's perspective—as a result of experiencing the program.

Specifies a result—not an activity.

Is related to the goal.

Is specific, measurable, and verifiable.

Is recorded in writing.

# Practitioners' Role in Evaluation

## Thinking Evaluatively

Design programs with evaluation in mind

Set aside resources to conduct evaluation

Develop goals and objectives so you know where you are going and so the evaluator has a gauge

Select a target population

Ask yourself—did we do what we set out to do?