

An introduction to...

Evaluation tools and methods



This course is a 5min read
with additional time required
for exercises

What you want to know defines the method used

“Impact” and “value” are often spoken of as the most important things to measure in any initiative. However, these terms are not quantifiable and so can not be measured – they need to be broken down further into specific points you want to know more about.

Ideally, you should think about what you want to evaluate at the start of your campaign. If you think about it at the end, you might realise your design doesn't collect the data you needed.

Key terms:

Qualitative methods

Research that creates descriptive results, e.g. focus groups or open text fields on a survey.

Quantitative methods

Research that creates or collects hard numbers, e.g. surveys, website traffic or monetary donations.

1. Identifying opportunities for improvement

Evaluation should be forward-looking. It is to find out what worked well, as well as areas for improvement.

When you think about what to evaluate, you are looking to identify data points that provide insight into the achievement of your initiative aims. This isn't about measuring your work performance.

Think about an initiative that used the term ‘impact’:

- What exactly was the change it wanted to make or encourage to happen?
- How would you need to know to measure this?

2. One size does not fit all

There isn't an evaluation method that works best across every context. Different methods yield different data, which provide different insights.

Hard numbers, such as the number of visitors to a website on a particular day, can provide valuable data points for comparison purposes or plotting trends over time. Such data are relatively easier to collect than conducting surveys and interviews, and are often used as KPIs (key performance indicators). However, they do not provide the wider context of how or why these trends are seen, and may require additional data sources to be combined to provide a more accurate picture.

Surveys are best when you expect the feedback you are getting (e.g. general satisfaction). You can use them to test the hypothesis you already have. However, they are less good for exploring around a topic, when the expected feedback is less predictable. Surveys can be set up online for free and they are often less time-consuming than organising focus groups, especially when you already have your customer base whom you can reach out to via newsletters, for example.

Focus groups are useful when you're not sure what they will say – exploring ideas which you might not be able to capture in a survey (e.g. what your audience wants to hear from you, etc.). They can often be seen as the ‘go to’ for gaining insight into what works or needs improvement, but can lead to a lot of unstructured data that can be time consuming to analyse in detail.

Think about the insight you wish to gain from your evaluation:

- Where would you find this data?
- Is this data already available or do you need to design a collection method?

3. Test test test

It is important to step back and test your assumption that what you are asking will elicit the right insights. Practice the chosen method in advance and ask externals (friends, family, colleagues) your questions to spot any ambiguities or points of confusion.



This activity takes 15min

Activity: Brainstorming

- When deciding what to evaluate, come up with lots of questions you want to find out.
- Once you have a list of questions, identify one or two key questions that you definitely wish to explore. Narrowing the scope makes it easier to design your data collection.
- Think about where you can find or who can provide the closest answer to your key questions. Can you use existing internal data as a proxy? Do you need to reach out to your existing or potential customers? Some of the questions might be relevant, others might be difficult to measure directly.
- Revisit other questions that you left and see if those questions can be covered in the approach you decided.
- Plan the logistics (timing, how to recruit participants/how to send out surveys) and develop questions using the template below.

Further resources

[Campaign/Event Feedback Form Template](#)

- You can copy this template to your Google Account from the '...' menu at the top-right corner ('Make copy'). You do need a Google account for this.

[Qualtrics guide on planning and conducting surveys](#)

[Survey Monkey resources](#)

[Question Pro guide on planning and conducting focus groups](#)

[Richard A. Krueger: Designing and conducting focus groups](#)