TCG
THEATRE COMMUNICATIONS GROUP, INC.
CENTERPIECE

FOCUS ON:
THE ART OF EVALUATION

• • • •

TRANSFORMING THE RESEARCH PROCESS INTO A CREATIVE JOURNEY

BY SUZANNE CALLAHAN

It happens all the time. In pushing to meet a grant deadline, you reach the end of the funding guidelines, only to read the dreaded words: "Describe how you will evaluate this project's success. State your measurable goals and the ways in which you will meet them." You anxiously ponder this dilemma with your staff, asking them: "What do you think the funder wants us to say? What should we claim that we would do? And what does evaluation really mean, anyway?" Well intentioned, you all sit down together and craft what sounds like impressive language about the ways you are going to evaluate your program. You use words like "track," "monitor," "surveys," and maybe even "qualitative" and "quantitative." You are not quite sure what these terms mean, but they sound appropriate and might increase your chances of getting the grant. You then submit the proposal, quickly forget it all and move on to your next deadline.

And then comes the real whammy: You get the grant. So now, in addition to implementing the project-which may layer new or additional work onto your staff-you actually have to conduct the evaluation. You review the proposal to remember what your organization actually said it would do to evaluate the newly funded project. You breath an apprehensive sigh trying to recall just why you committed to evaluation and how in the world you are going to pull it off with everything else you have going on. Suddenly evaluation feels burdensome, difficult and expensive. You begin to question if and why you really need to evaluate.

This dilemma is all too common for arts organizations. The term evaluation is heard so often and appears in most funding guidelines. In order to be competitive for grants, arts organizations feel obligated to conduct evaluations. Yet, there is limited understanding of what the term really means. This is logical, since evaluation is a relatively new undertaking for most arts organizations, whose limitations in budget and staff already challenge their ability to implement existing programs, create and tour new work, hold annual conferences and sell tickets, let alone train or hire staff in this entirely new technical programmatic area.

The purpose of this three-part article is to help take the mystery and fear out of program evaluation. Understanding the underlying purpose and concepts of program evaluation can shed light on the ways in which it can help your organization. When linked early on with careful and thoughtful planning, program evaluation can empower you to think in integrated, informed and effective ways about your organization's current and future programs. In so doing, evaluation shifts from being a burdensome and sometimes intimidating requirement of funders, to a useful tool for shaping, developing, assessing and learning about programs. Once informed, you can take control of the evaluation process, rather than it owning you.

Copyright © 2000 by Theatre Communications Group, Inc. All articles reproduced by permission of the authors. No portion of this publication may be reproduced in any form, or by any means, including photocopying, without written permission from the publisher or author. Theatre Communications Group, Inc., 355 Lexington Ave., New York, NY 10017, telephone (212) 697-5230, fax (212) 983-4847, website: www.tcg.org. Ben Cameron, Executive Director; Joan Channick, Deputy Director; Christopher Shuff, Director of Management Programs.

As you read this three-part interactive guide, I encourage you to consider the ways in which the information presented relates to your own organization, experience and existing programs. Part I dispels several myths about evaluation which I hear repeatedly from arts organizations. It discusses the role of planning as an integral part of evaluation and the multiple uses of evaluation; and provides guidance on beginning to plan and budget for an evaluation and selecting outside consultants. In the sidebars, you will find resources for further study and a guide for selecting outside assistance with your evaluation. Part II provides an overview of planning and designing evaluations, including formulating basic research questions. It explains the technical aspects and terminology that one often hears in discussions about evaluation. Part III will talk about analyzing and reporting the findings from an evaluation. It will also include the perspectives of select funders and address anxieties that sometimes occur, such as reporting unexpected findings to staff, Board and funders.

1. DISPELLING SOME MYTHS ABOUT PROGRAM EVALUATION

In discussions with practitioners in the arts field, I have heard a number of misconceptions about evaluation. Because grasping what evaluation *is* involves understanding what it is *not*, first let's dispel several commonly believed myths.

Myth 1. The purpose of program evaluation is really to satisfy funders. Its main function is to justify grants and generate final reports at the end of grant periods. Arts organizations should try to determine what funders want and promise to deliver it.

While this is partially true, adhering to this belief limits the usefulness and relevance of evaluation. It is true that evaluations can provide great content and justification for fundraising. Reporting back to funders about the impact and activities that their funding supported lets them-as well as you-know that their money was well spent. However, program evaluation should serve as a complementary, ongoing tool to monitor and improve programs. Beginning the evaluation process at the end of the cycle limits its usefulness and decreases its potential for improving programs:

Evaluation, to be practical and worth its cost, should not only assess program results but also identify ways to improve the program evaluated. When program evaluation is used only for external accountability purposes and does not help managers improve their programs, the results are often not worth the cost of the evaluation.

Wholey, Hatry and Newcomer, editors
Handbook of Practical Program Evaluation

First and foremost, program evaluation goes hand in hand with planning and staff should integrate both processes as ongoing functions. Arts organizations sometimes misinterpret this basic premise: a useful program evaluation relates directly to your mission, goals and programs and measures your success. As discussed in section three, effective evaluations serve multiple functions and can address and improve numerous aspects of programs including marketing, personnel and program design.

Myth 2. Program Evaluation is easy and can be conducted solely by staff.

Myth 3. Program Evaluation is difficult, costly and can only be done by experts.

The real truth lies about halfway in between these two statements. It is desirable, even mandatory, for staff to integrate evaluation as part of their planning and workload, but there are limitations to what can be done internally without the help of expert, trained assistance. Section four of this article distinguishes between in-house versus external evaluations and when and how to secure outside assistance.

2. THE VITAL ROLE OF PLANNING IN ENSURING THE EVALUATION'S SUCCESS

The time to think about evaluation is at the inception of a program, not at its end. The key is to continually ask and answer all important questions at the beginning and throughout your program process (which can mean at the inception of the program, or a new school year [season], or a new program cycle.) The way to choose an important question is to ask yourself, "What will we know from answering this question that we don't know now and how will we use this information to make important decisions?" These key questions are answered on an ongoing basis so that every month or every quarter you have new information on how well you are doing versus how well you had hoped to do. Then you can make the adjustments necessary to continue your journey.

Allison Fine, Executive Director, Innovation Network
NIDR Forum, 1997

Making decisions early on about how to evaluate a program and integrating it as an ongoing process provides effective tools to monitor progress. When combined with thoughtful planning, program evaluation provides a process for an arts organization to articulate and value its programs. As a staff or Board member, it allows you to realize the difference that your investment makes to your artists, constituents and community, as well as to funders. If you are investing in creating and implementing a program, what do you wish to get out of it? Arts organizations should strive to design and conduct evaluations that provide relevant information that benefits their staff, programs and constituents and that informs and influences progress.

Your organization invests extensive human and other resources in its operations. Consider the range of resources, or inputs, involved in programs. Planning and developing programs involves artistic directors, curators, Board members and other staff. Creating new work involves playwrights, composers, actors, designers and technical staff. Acquiring funding requires the time and resources of development staff to research, plan, approach and report to funders. The finance staff develops and monitors budgets, the marketing staff reaches new and existing audiences and the education staff plans and develops outreach activities. Then, there is overhead and equipment and Board time. Add in other artists and community partners and freelance assistance with writing, graphics, production and other areas. What about the interns-who finds and supervises them? Considering the extent and cost of all these inputs, wouldn't it be helpful to know what a difference your programs make and ways you might improve them, for all involved?

In planning and evaluation, having active involvement from each group of **stakeholders**—or those that have a stake, or vested interest—helps to ensure the program's success. Stakeholders include some or all of the groups described above, depending on the project. Having their active involvement ensures that your planning is relevant to the people on whom your program depends and increases their sense of ownership in your effort.

It is vital to the success of your effort that your program be demand driven. You must have the input of the people who are most affected by your outputs at the table—not in the back of your mind and not in the back room, but physically around the same table as your Board members, volunteers and staff. In particular, you must plan with the development people and program people working in concert (I know that in many small organizations these are one in the same people—but in this case don't forget to use both sides of your brain).

Allison Fine, Executive Director, Innovation Network
NIDR Forum, 1997

3. THE MULTIPLE USES OF EVALUATION

There's an added benefit in evaluating early on and throughout a program's life cycle. Since evaluating programs prompts arts organizations to obtain information that they otherwise would not seek, often the research and findings can—and should—overlap with other areas such as marketing, audience development and partnership building. As part of its planning and evaluation process for the Lila Wallace-Readers Digest Fund Audiences for the Performing Arts Network (APAN), the Washington Performing Arts Society conducted focus groups and surveys of its audience members. While this research fulfilled planning/evaluation requirements, it also provided WPAS with new information that informed program design.

Audience Development. WPAS found that audiences desire more information about artists and art forms prior to and during events. Staff used this information to create a new education/marketing publication, Insights, which is distributed in advance of and at performances in order to educate audiences—so far the response has been positive, including feedback from the artists themselves.

Market Research. Evaluations may require audience surveys. Gathering information about demographics and performance habits can inform marketing plans. For WPAS, the focus groups provided information about audiences' behavior patterns and the factors that encourage them to and discourage them from, attending performances.

Partnership Building. When working in partnership with other organizations, the evaluation process can help arts organizations to collectively determine their strengths and weaknesses. Out of their APAN evaluation, WPAS and its partners (the Dance Place, Freestyle Union, George Washington University’s Lisner Auditorium, GALA Hispanic Theatre, Howard University, Liz Lerman Dance Exchange, the Smithsonian Institution’s Museum of African American Culture and Woolly Mammoth Theater.) developed a frank and thoughtful list of Best Practices for Successful Collaborations which it has shared with other presenters and funders. This list constructively presents successes and also lessons learned throughout the collaborative process. The value of this tool is that it was developed from those most directly involved in the partnership and who will continue working together in the future.

Impact of Programs on Constituents and Staff. Finally, staff can utilize evaluation to assess and document the importance and impact of the work they do every day. In its focus groups, WPAS learned that audience members appreciated seeing their staff at performances and remember the efforts on the part of staff to exchange tickets and respond to phone calls. In addition, hearing from constituents that a new program truly made a difference can motivate staff's job performance. In evaluating another WPAS program called Tappin' Tigers, a new in-school tap dance residency, we extensively interviewed students, parents, teachers and artists involved and gathered a wealth of surprising evidence. Not only had students learned tap dance and history, but this new program had improved children's discipline, their behavior at home and their academic participation. The program also fostered a wonderful sense of belonging to a special group, of being a "star." One boy is now known as (tap dance virtuoso) "Savion" at his local barbershop and a parent said that she had "never seen her child's eyes light up like this before." Having this kind of detailed feedback was useful to the education staff, who said that "we can do our jobs every day and assume things are going okay, but having this kind of information makes us realize that we are successful in ways that we otherwise would not know."

4. BEGINNING THE EVALUATION PROCESS

Understanding Internal versus External Evaluation. It is important to distinguish between the kinds of evaluations that can be completed internally by staff versus those that require expert assistance, for the type of evaluation undertaken affects both your organizational capacity and budget. In cases where organizations lack the time or resources to design formal studies, conducting a limited survey of members, staff, or audiences may prove helpful. Interns can help collect and record the data as long as staff carefully trains them and supervises the process. Holding individual or group interviews with your administrative staff or performers at the end of a season can help to clarify what went well and what didn't. Conducting such research will produce information to inform and improve your operations. Staff can decide upon some basic questions and gather useful information that supports or tests assumptions about its programs. In fact, Kim Chan, director of dance and new performance at WPAS, created the above-mentioned Best Practices from asking questions of APAN partners and encouraging a useful, ongoing dialogue for all who participated in the partnership, as based on their individual and collective experience. It did not require an expensive survey or computer analysis, but it clearly required commitment, motivation and openness on the part of staff to examine and improve their working relationships.

However, the caveat for smaller, in-house studies is that they cannot be used to draw substantial conclusions or make major decisions, because the research is too limited in scope and sophistication. At a given point, program evaluation requires expert assistance to ensure that its design, methodology, data collection and analysis are sound and valid. This is particularly true in instances where organizations are considering changing their policies or budget priorities based on the results of the evaluation. The validity of large-scale evaluations hinges on an empirical process of asking the right questions of the right people, of analyzing the information using scientifically valid procedures and generating useful, clear reports that are tailored for the reader(s) who will rely on them for decision-making and policy development. Such a process requires a firm grounding in research methodology and statistical analysis.

The Drawbacks of Limited Research. The most common problem that occurs in evaluation, particularly for the novice or underskilled researcher, is the tendency to draw conclusions and recommend or make changes, too quickly and easily based on limited information. Once a bit of research has been done, there is a tendency for those involved in the study to feel "smart" and "insightful." This can be a dangerous place because one risks the possibility of drawing conclusions and recommending changes that held true for a limited sample of participants studied, but not for the entire population of those served by your program. The bottom line is, in considering organizational or policy change, if you base a decision on an incorrect conclusion from an evaluation, what might it cost your organization?

Selecting Outside Assistance. Since Part I of this article provides an overview of a complex topic of program evaluation, it may leave the reader with numerous questions about selecting consultants that can design effective evaluations. When considering consultant assistance, it is crucial to select someone who is trained in research methods, statistics and quantitative and qualitative analysis. To aid in this process, a list of questions to ask potential consultants, along with guidelines for responses, appears below. In addition, you may seek guidance from local universities that provide academic training in evaluation within their programs in public administration or management. Professors can serve as excellent resources and may even assist with identifying graduate students with the necessary skills. If your organization plans to conduct evaluation on an ongoing basis, you may consider providing training for a staff member in research methods and statistics, so that a significant amount of the work could be done internally.

QUESTIONS TO ASK WHEN SELECTING CONSULTANTS FOR EVALUATION

In selecting outside consultants, it is imperative to obtain qualified, expert assistance. The following questions can serve as a guide in assessing their skill level and compatibility.

What is the consultant’s formal training in research methods, statistics and quantitative and qualitative analysis?

Consultant should have attended a formal program through a university or other training institute. Can the evaluator determine and conduct appropriate statistics? Does the evaluator understand research methods?

What is the consultant’s experience in conducting arts-related evaluations and working with arts organizations?

Can the evaluator translate program needs into evaluation questions? Does the evaluator understand programs in the arts field?

What is the consultant’s working style?

Candidate’s style should feel comfortable to you. Is the evaluator sensitive to your needs for information? Do you feel good about the way you and the evaluator communicate? Does the evaluator give you options and let you make the final decision?

Can the consultant furnish examples of past evaluations?

Be sure to call at least two of them. Do past clients speak highly of the evaluator? Would past clients use the evaluator again? Does the evaluator deliver products and services on time and within budget?

Does consultant have experience working in statistical software such as SPSS or SAS?

Candidate should have first-hand experience with a statistical software package. Be careful of those who subcontract this function, as it may indicate limits in their understanding of statistical analysis, which is a critical part of the research process.

In past evaluations the evaluation conducted, how did the consultant control for non-response bias?

The candidate should suggest measures where they went out of their way to reach respondents who didn’t initially volunteer to participate in study.

Budgeting. The cost of evaluation can vary broadly, depending on the type and scope of the study. An internal survey can be conducted and analyzed for minimal amounts of money, particularly if interns or volunteers are involved in collecting the data. Hiring outside consultants can vary from around $5,000 for designing and administering a survey to as much as $60,000 for a year-long extensive study with multiple instruments and numerous respondents. Consultants should be able to provide detailed budgets that explain these costs; while such fees seem high, the research process and related analysis and reporting are labor intensive.

Whether small or large, conducted internally or commissioned from consultants, staff can and should be closely involved in any evaluation. Your participation and ownership is critical to its success and you should understand and approve all aspects of the evaluation design.

CONCLUSION

The art of evaluation involves creating a design and gathering information that is appropriate for a specific situation and particular policymaking context. In art, there is no single, ideal standard. Beauty is in the eye of the beholder and the evaluation beholders include a variety of stakeholders: decision makers, policy makers, funders, program managers, staff, program participants and the general public. Any given design is necessarily an interplay of resources, practicalities, methodological choices, creativity and personal judgements by the people involved.

> Michael Quinn Patton
> *How to Use Qualitative Methods in Evaluation,* 1987

Program evaluation can effect positive change, improve programs and help arts organizations understand the value of their efforts and the impact of their hard work. I invite you to immerse and invest your passions, talents and skills into this creative journey.

PART II

IN THIS PART, I WILL PROVIDE GUIDANCE ON DEVELOPING A SUCCESSFUL PLAN FOR CONDUCTING AND EVALUATING PROGRAMS. Though parts are technical, this article is understandable and enlightening for beginners as well as for more seasoned arts practitioners who want to augment their understanding of evaluation.

1. DEVELOPING YOUR ROADMAP FOR A SUCCESSFUL JOURNEY: The Basic Questions to Answer in Planning and Evaluating a Program

Part I emphasized the dual role of planning and evaluation early on and throughout the lifetime of a program. Whether conducted internally by staff or with external assistance, the planning and evaluation process begins by answering the basic questions below.

What are your goals for the project? State *your* goals—not what you perceive the funder may want. If the project were truly successful, what would happen? What does success mean to the **stakeholders**, or those that have a vested interest in the project? This is for you to decide collectively, based on your needs, insight and past experiences, not on predetermined funding guidelines. Of course you would consider and respect the funder's wishes, particularly if their support is attached to specific program components. But what would truly benefit those you strive to serve?

Evaluation, assessment, quantifying results, measuring outcomes—whatever you want to call it, the bottom line is that you have to create a bottom line for your organization. The key to doing this is to ask the people who most affect and are affected by your efforts what success looks and feels like. In other words, you have to figure out what success is to know if you are getting there or not.

> Allison Fine, Executive Director, Innovation Network
> NIDR Forum, 1997

What are your target populations? The process of defining goals involves identifying target population(s). Is your program geared toward artists, audiences, community partners, students, administrators, staff, or others? The correct answer is not "all of the above." Trying to be all things to all people risks setting yourself up for failure, or at least disappointment. If the program serves more than one group, articulate a priority order based on your organization's mission and goals.

What strategies will help you meet each goal? A **strategy** is a discreet set of activities or steps taken in order to meet a goal. What action steps do you or others need to take in order to reach each goal? If you are expecting that your new series of plays will increase family attendance by 10%, what steps will ensure that this happens? Will you increase advertising, develop new marketing strategies, develop contacts in schools, distribute flyers, etc.? Some strategies may fall within staff's current job responsibilities and some may require new work, extra money, or outside assistance. Strategies should be developed with the input of the staff person(s) responsible.

Are your goals and strategies realistic? Practical? Feasible? Is it feasible to state as a goal that all performances of a new play will sell out? That a new performance series will generate a 20% increase in subscriptions? That starting a theatre program in two schools will increase literacy in the local school system? Goals should not be so lofty that they put your organization out of business or position it to fail. Feel free to revise the goals and strategies to ensure they stay within reach.

Take an internal reality check. Is the plan practical? Have stakeholders bought into the plan? Are they in agreement about its goals, target groups and strategies? Committing to an evaluation will require the awareness and participation of all stakeholders—does your planning process involve staff, board, artists, partners and, if relevant, funders? If not, feel free to revise your plan.

Finally, are you willing to stay flexible? Organizations inevitably undergo changes that modify the planning and evaluation process. Denise Cavanaugh, a consultant in strategic planning in Washington, DC, describes an organization in the planning process as a sailboat moving from one port to another—the boat may chart a straight course, but in order to reach its destination, it must constantly adjust its path and speed as the wind changes. For arts organizations, the "wind" is your day-to-day environment and includes variables such as staff capacity, funding opportunities, audiences, community partnerships, press coverage and, as we all know, sometimes even the weather itself. Like a sailboat, an effective planning and evaluation process is constantly monitored and stays flexible to change as the need arises.

2. THE FIRST STEPS IN DESIGNING AN EVALUATION: Deciding How to Measure Success Determines What You Need to Know

An effective evaluation involves gathering the appropriate information in order to determine how close, or far, you are from meeting the goals at key points throughout the program, as well as to assess what you have learned along the way.

What You Need to Know: In order to evaluate the program's success, what questions do you need to answer? In order to assess if you have met your goals, what information about those who implement, participate in, or are served by the program would be most useful? What data will best help you to conduct and improve this program in the future? Often arts organizations respond to these questions by saying they want to determine the "impact," "effectiveness," or "usefulness" of the program. It is key to articulate how your organization is defining such broad terms. The effectiveness of a new commissioning program is assessed differently than the effectiveness of a new community outreach program to an underserved area of town.

Defining such broad terms requires working with stakeholders to identify some of the possible **indicators,** or types of evidence by which the program is assessed. A suitable indicator for a new performance/residency program may include specific quantifiable **outputs**, such as audience size or ticket income, which are measured with discrete numbers. It may also include **outcomes**, or measures of the effects of the program, such as the quality of the artistry, degree of satisfaction of artists involved, amount of public attention received, involvement of community members and interesting stories about those who participated. Often outcomes are unexpected and they can happen long after the program itself. One example of outcomes from Part I was the story about the Tappin' Tigers residency where a boy who studied tap dance became known as "Savion" at his barbershop. Another outcome of the project was the development of the Best Practices document, which will enable WPAS to improve their collaborations on future residencies.

I forewarn that even among experts, ongoing and heated debates exist about if and how goals can be measured and how to determine the most appropriate indicators. This is one area where seeking outside assistance from experts may prove useful and ultimately save time and money.

The Concept of Co-evaluation. All forms of evaluation need not involve large amounts of money, labor, or time. There exists a growing movement to incorporate evaluation into daily planning and operations. In their book *Evaluation With Power*, Sandra Trice Gray and Independent Sector outline a process of co-evaluation, which literally means evaluation together, a constructive and continuous process that involves all staff members and takes place as part of the daily routine within an organization. They introduce the concept of using a Questioning Agenda for staff and board meetings, addressing the following, for example:

- Since we last met, how have we advanced the organization's vision, mission, programs?
- What was the benefit to the organization? To our clients?
- What prevented us from making further progress?
- If those obstacles were removed, what would happen? If those obstacles remain in place, what can we do instead?
- What single action might we take right now to break through to a higher level of effectiveness? How would we know if it worked?
- What benefits would the organization or our group gain from having other people or resources in our meetings?
- Are you getting the information you need to be more effective? How can our meetings be more helpful?

3. DEVELOPING THE EVALUATION DESIGN AND GATHERING INFORMATION

Now that you know the kinds of information you need to gather in order to evaluate your program, it is time to consider the methods you will employ to obtain it. While the guidelines for developing a full evaluation design go beyond the scope of this article, the highlights of the process are outlined below. Note that the sidebar on page 22 includes resources that provide detailed information about each topic in this section.

The Three Purposes of Gathering Information: Distinguishing between Evaluation, Documentation and Research. In developing your evaluation design, it is important to understand the purposes of and differences between these three activities. All are valid ways to gather and record information, but they serve different functions. Evaluation can be distinguished from documentation in several key ways. **Documentation**, as its name implies, creates a record, through qualitative and/or quantitative methods, of a program, phenomenon or process. **Evaluation** systematically measures the value of and/or change that occurs as a result of programs. Evaluation is often used to make policy or programmatic decisions and recommendations for improvement.

How You Will Gather Information: Given the kinds of information you need to gather, what are the best and most plausible ways to obtain it? This involves completing the following steps:

A GUIDE TO LEARNING ABOUT PROGRAMS BY GATHERING INFORMATION

Learning Step

1. Determine what information you currently have in place that might aid in the evaluation process. Your efforts to gather information may fall within current job functions and day-to-day activities.

2. Identify what new information that you need to gather in order to assess your program's success. Consider which of the methods in section 3 seem most appropriate.

3. Determine if the information is identifiable and accessible. If you wish to reach audiences, students or participants, you must be able to access them. This may involve capturing their names and addresses and contacting them at a later date. Computer systems can vary widely in this regard.

4. Take a reality check. Assess the financial and other resources required to gather the information. You can only report on research data that you do gather, not that which you cannot obtain. Assess the cost involved and access to research expertise. Revise your efforts as necessary.

5. How will this information be used to make decisions and improve programs?

Examples:

Theatre companies typically document attendance and ticket revenue and may regularly survey audiences or members.

At meetings, staff routinely relays success stories from performances and distributes press coverage

A survey can provide a quick perspective from partners, participants or audiences that helps to inform future events

Gathering stories from performances/rehearsals can provide compelling snapshots for funders, board members, staff and potential donors

Theatre companies often rely on contacting audience members who subscribe or purchase tickets by credit card, as it is difficult to capture those who pay by cash. Incentives such as drawings for free tickets may encourage some people to furnish contact information.

While detailed qualitative analysis, such as focus groups or extensive quantitative analysis, such as surveys of large samples, can be particularly costly, the information they generate can inform and enlighten programming and marketing staff.

Right now, numerous evaluation reports are gathering dust on shelves because they were never or partially used.

Documentation and evaluation can complement one another—often a documentation process provides information that is later incorporated into an evaluation. For example, if staff or artists maintain journals, interview transcripts, or field notes throughout a residency, this information may later provide data for evaluating the program.

Research is a systematic study in a particular area of knowledge; it may or may not relate to documentation and evaluation. One might research audience response to a new work, which can relate to documentation and to evaluation, or the cost of purchasing new stage lights, which probably relates to neither.

Quantitative versus Qualitative Data. Arts administrators regularly ask me about the differences between these two terms.

Quantitative methods use standardized measures that fit diverse opinions, experiences and demographics into predetermined response categories. Audience surveys are perhaps the most common example, where respondents are asked to check boxes that define their zip code, age, etc. The advantage of quantitative data is that it measures the reactions of a great many people to a limited set of questions, thus facilitating a comparison and statistical aggregation of the data. This provides a broad, **generalizable** set of findings, which means that they can be used to learn about the entire population that you are studying.

By contrast, **qualitative** methods typically produce a wealth of detailed data about a much smaller number of people and cases. Qualitative data provide rich depth and detail through direct quotation and careful description of programs, events, people, interactions and observed behaviors. The advantage of using detailed descriptions, direct quotations and case studies is that they are collected as open-ended narratives. Data collectors do not attempt to fit program activities or people's experiences into predetermined, standardized categories. The character and richness of the data itself dictates the way in which it is analyzed (Patton, 1987).

Guiding Questions to Inform Planning:

How can existing information help to inform the planning of your new program?

How can documentation of the outcomes from past activities shape the planning of future ones?

How can information help you to know if you are successful or not?

In order to assess your success, who do you need to talk to?

What do you need to ask them in order to learn about and improve your program?

What methods can you employ to increase access to and amount of information from program participants?

Of these methods, which might be incorporated into daily operations?

Do you have the staff and expertise to conduct the research? Who on staff will oversee data collection efforts or serve as point person to the consultant?

How might outside assistance from experts or interns support your efforts? How might you identify and obtain such help?

How might the benefits of information gathering equal or outweigh the costs—so that it impacts areas such as marketing and programming?

Are those with the control over and responsibility for the decision-making involved in the evaluation process?

One of the most common qualitative techniques is the group interview, or focus group, where a moderator conducts a group discussion among five to ten people in order to learn their opinions, attitudes and thought processes about a given topic. The group dynamic encourages a deeper level of discussion and allows the moderator to probe for topics that are important to the arts organization. While commonly associated with traditional market research, focus groups can provide a wealth of data about not-for-profit programs and services and serve as a mechanism for arts staff and decision-makers to become actively involved in the research process.

In order to grasp the difference between these two forms of data collection, consider the answers to the same questions when asked on a quantitative survey versus a qualitative interview.

Data Collection: The Who, What and How of Evaluation Design. Since the validity of large-scale evaluations hinges on an empirical process of asking the right questions of the right people, let's consider the ways to figure out *whom* you should talk to, *how* you should approach them and *what* you should ask.

***Who* you ask: selecting the participants**. **Sampling** is the process of selecting participants for your study. In cases where the **population**, or group of people that you are studying is small, it is desirable to include the entire group. When the population is so large that you cannot include all participants in your study, as is the case with audience members, the commonly accepted practice is to select a sample based on agreed-upon criteria.

The best and most commonly accepted process of sampling is to randomly select respondents. **Random sampling** helps to ensure that the findings from your sample are likely to reflect the characteristics of the entire population that you are studying. In instances where participants hesitate to be interviewed, offering incentives such as cash or free tickets may help.

The Sampling Process and the Perils of Biased Data. The sampling/selection process is absolutely key to ensuring the validity of the evaluation. A flawed or biased sampling process reaps flawed or biased data. Perhaps the biggest threat to conducting effective evaluations is gathering information that does not truly or fully represent the population being studied and thus misrepresents your program. Biased data may lead to false conclusions, possibly resulting in changes to your program that are not appropriate.

One common practice that can generate biased data is to approach those who we know, who are easiest to reach, or with whom we tend to agree. This may unintentionally change, dictate, or bias the results. It is crucial to attempt to control for **non-response bias**, which refers to the fact that information is absent from your study from those who chose not to respond—you cannot assume that non-respondents would answer in the same way as respondents. For example, an audience at a preview performance, comprised mainly of friends and family members of the artist, may respond differently to the performance than an audience during the run.

In addition, it is important to take note of cases where the flow of money to the participant may bias the information-gathering process. For example, organizations that commission work, grant or re-grant funds, or are under contractual arrangements with participants should remain aware of the concept of **self-reporting**—where individuals and organizations report on how well they themselves used your money. We are all human and organizations or individuals that have a vested financial interest in your organization, or who hope to receive resources in the future, may tend to offer positive, rather than problematic or negative, responses. While it is of course desirable to gather information from program participants or grantees, establishing an environment of trust and openness is helpful in obtaining truthful responses and participants should not be punished for reporting their shortcomings during an evaluation process. Whenever possible, maintaining participants' anonymity may increase the likelihood of gathering accurate information.

Finally, the size of the sample is also critical to determining whether or not one can draw conclusions from the data. When studying a small sample, the data obtained is not always representative of the population, simply because a critical mass of information is missing. There is no ideal sample size. Statistical guidelines can help to determine an acceptable sample size and to obtain **statistical significance**—the likelihood that statistics from your research can be used to generalize about the population you are studying.

In summary, a random, anonymous sampling process can help control for a number of potential biases and is one of the most powerful tools for obtaining useful and valid information. Because the selection of participants is so important, deciding upon sampling procedures and size are areas where a small amount of expert advice can go a long way toward increasing the validity and usefulness of your evaluation.

QUANTITATIVE SURVEY

1. How many times do you see theatre each year? ___ 2 __ 4 __ 6 _x_ more
2. Is this the first time you have been in this theatre? _x_ yes __no
3. Check off the types of art you have seen this month: _x_ dance _x_ music _x_ theatre
4. Would you come back to this theatre? ___ yes _x_ no
5. How would you rate this organization? _x_ high ___ medium ___ low

QUALITATIVE INTERVIEW

1. "Well, since my girlfriend is in a theatre company, I of course have to go, so it depends on where and when she performs."
2. "I used to be a member of this theatre before they moved, but I never get out this way since it is now so far out of town."
3. "I saw Fiddler on the Roof last week and it had singing and dancing, so I figure it qualifies as dance, music and theatre."
4. "I don't live here. I am visiting my cousin."
5. "Every year, they expose me to great plays. And their brochure is so much fun to read."

***How* you ask: the types of instruments used?** Volumes have been written on research instruments and resources for learning more about each type can be found in the sidebar. The most common instruments are surveys, focus groups, individual interviews, case studies, reviews of internal documentation such field notes and memos and direct observational methods. The instruments chosen depend on what information you strive to obtain. If the performance of your new premiere sells out and receives three standing ovations, your own observational research can conclude a positive audience response—there is no need to design a study. Conversely, if you are evaluating the merits of your membership services in ways that might lead to programmatic change or that have financial ramifications, such as an increase or decrease in annual dues, it may behoove you to engage an outside party to do some in-depth qualitative and quantitative research and analysis through a combination of surveys and interviews. The most powerful tool for increasing the validity and reliability of any study is the use of **multiple measures**—the combination of a number of research techniques on various participants in order to gather more data that confirms results. Using multiple measures decreases the likelihood of drawing wrong conclusions.

***What* you ask: likewise, the design of the instruments themselves is key to obtaining useful information.** Designing effective questions is challenging, more so than it might appear. The best questions are simple, short, clear and unbiased. My rule of thumb is that if the respondent hesitates when answering, or asks you to repeat the question, then you may need to improve its wording. It is easy to ask well-intentioned questions that are biased or that don't elicit the information sought. Consider the following question:

The arts organization's staff is available and helpful prior to performances? ___yes ___no

This is an example of a biased question because it implies a positive answer. Furthermore, it is double-barreled. What if the staff answers every time I call, but never has the answer to my question? What if staff is difficult to reach, but when I do talk to them, they provide me detailed information and solve my problem? Do I answer yes or no? How does the researcher interpret my answer? It also does not include an answer for respondents who have no opinion and/or have had no experience with staff. Again, volumes have been written about designing questions and learning more about this area will improve not only your evaluation skills, but also other day-to-day efforts to gather feedback.

CONCLUSION

For the ongoing health of our organizations, we need to set aside the hoop-jumping and bean-counting view of evaluation. As long as it is a single event or activity that comes at the end of a grant-funded project—and bears only on those organizations seeking such finding—then evaluation is an imposition. As soon as we turn the idea around, however and look at the benefits of strengthening every aspect of the organization to determine how well we are doing overall to attain our mission while holding our vision, the imposition vanishes.

> Sandra Trice Gray and Independent Sector
> *Evaluation with Power*, 1998

Reading this overview of the planning and technical aspects involved in evaluation may raise questions about the amount of commitment and effort required. However, when thoughtfully designed and carefully conducted, the benefits of learning that occur through information gathering can be significant and far-reaching. When viewed as part of an ongoing learning process, program evaluation can allow stakeholders to realize—and increase—the value of their programs to the artists, audiences and students served as well as to the larger community.

PART III

Part III discusses analyzing and reporting findings to staff, board and funders and the anxiety that this can cause. Several funders agreed to share their thoughts and advice with the arts field: Anthony Tapia, Association of Performing Arts Presenters Arts Partners Program; Jane Polin, GE Fund; Katherine Freshley, Eugene and Agnes E. Meyer Foundation; Douglas Sonntag, National Endowment for the Arts; Marian Godfrey, Greg Rowe and Janice Shapiro, The Pew Charitable Trusts; and Rory MacPherson, Lila Wallace-Readers Digest Fund.

SO, YOU'VE DONE IT. YOU'VE ALMOST FINISHED CONDUCTING AN EVALUATION. NOW, WHAT DO YOU DO WITH ALL THE INFORMATION? A stack of surveys sits on the bookshelf as you prepare for tomorrow's premiere. Focus group transcripts and meeting notes are filed in your drawer. How do you convert what seems like a daunting amount of information into a useful learning tool for stakeholders? What if paid ticket sales were 300 in a 2,000-seat house? What if key staff quit mid-stream? Do, or *how* do, you report this to funders?

ANALYZING DATA

Emphasize learning, not judging. In reviewing data, remember the following two principles: 1. Evaluation is not punitive. 2. There is no pass-fail system—a grade is not given. Rather, evaluation allows you to learn about and improve programs. Your realities—good, bad and in-between—comprise and define the reality of what arts organizations live through every season. The "arts field" consists of our aggregate efforts—both successful and unsuccessful—to create, present, teach, produce, convene and administer. Addressing issues and problems that arise is part of the process.

Embrace the writing process. In all honesty, I am usually overwhelmed when I sit down for the first time with the data. I refer to the wisdom of author Anne Lamott from her humorous book *Bird by Bird: Some Instructions on Writing and Life*:

Thirty years ago my brother, who was ten at the time, was trying to get a report on birds written that he'd had three months to write. It was due the next day…he was at the kitchen table close to tears, surrounded by paper and pencils and unopened books on birds, immobilized by the hugeness of the task ahead. Then my father sat down beside him, put his arm around my brother's shoulder and said, "Bird by bird, buddy. Just take it bird by bird.

The advantage of technology. The good news is that we live in an age where computers have radically simplified the process of analyzing data. What researchers used to work on for weeks with index cards, the average PC can now perform systematically in a much shorter time. However, computers only know what we tell them, so your challenge is to combine your insight and experience with technology in order to consolidate large amounts of information into a summary form that can help stakeholders to grasp, absorb, make decisions and, if need be, modify programs.

Quantitative analysis. For simpler evaluations, spreadsheets developed on a PC can consolidate data. Software such as D-base, Excel and MS-Access can perform limited quantitative statistics such as cross-tabulation, averages and standard deviations, but do not produce extensive visual aids. For in-depth evaluations and statistical analysis, more sophisticated software such as SPSS can produce graphics that illustrate the trends and distribution of data. Using it may require outside assistance.

Qualitative analysis. Qualitative data is usually studied using *content analysis*, a systematic review of the material to identify issues and themes. You can conduct your own review by reading the data carefully, noting salient points and recurring themes. Sometimes this is all that your time and budget will allow for and, depending on the purpose of your study, it may be sufficient. However, since manual systems rely on our memory and subjectivity, there may be the tendency to highlight those issues with which we agree. Computers analyze systematically and remember everything we tell them. This allows us to check our opinions and hunches against the data itself. Word processing software can perform limited qualitative coding in tables or keyword searches. However, for in-depth or long-term studies that include, for example, focus groups, interview transcripts and/or field notes, I recommend using one of the many softwares designed to do content analysis.

REPORTING THE FINDINGS

The report that summarizes the evaluation is crucial—often it is the only documentation and evidence that stakeholders, including funders, review and consider. The report remains in your organization as the record and testimonial of your hard work. While, after a lengthy research process, you may wish to produce an all-out encyclopedia of numbers, percentages and facts, your work is best served by summarizing the data and stating your main findings and observations. As long as you can justify your observations if asked *and that they can be clearly traced to the original data* (see below), summarizing helps the reader. It may be useful to involve several stakeholders into this process, incorporating their response and feedback into the report before it is disseminated. Extracting a one to five page executive summary will convey the report's salient points to a broader readership.

Drawing Conclusions: Do you know or do you think you know? Drawing conclusions should be done carefully, preferably in conjunction with someone who understands research methods and statistics. There is a tendency for the well-intentioned or novice researcher to attach too much weight and too many conclusions to limited, or biased, data. For example, in a small mid-western children's theater company, conclusions were drawn about a program's value based on one focus group (limited data collection) of twenty-six participants (three times the usual size, meaning that each person spoke for a short time) of parent volunteers who were talking about how well their children performed (which involves self-reporting and may indicate a positive bias). The bottom line is, if your conclusions are wrong, what might it cost the organization?

Making Recommendations: A thoughtful and careful process. After reviewing the findings, stakeholders should collectively consider and develop any final recommendations. Clients regularly look to consultants for advice. However, I have learned to rarely make recommendations as a part of an evaluation. If so, I always label them as such in a separate document or chapter and fully discuss them with staff in advance.

Using the findings: A caveat. However thoughtfully designed, carefully conducted, or statistically valid, evaluations are useful only if the stakeholders review, consider and act on their findings. This is where the process outlined in these three articles comes full circle: It is critically important to consider the end uses of the study at the onset of the planning and evaluation process. This includes identifying who will read the report and be responsible for implementing change based on it. Those people should be actively involved in the evaluation process.

Dealing with less-than-perfect findings. A positive evaluation is not necessarily a perfect evaluation. There is some likelihood that your research may unearth some mixed or negative information, or help pinpoint areas for growth and improvement. Sometimes the negative information helps us most because it challenges our assumptions. I encourage you to constructively incorporate this information into the report—it is the best, or only, way to ensure that your stakeholders are aware of problems and can act to solve them. In working as an evaluator, I have most admired the arts organizations that openly consider, debate and act on *all* information presented, including negative findings—they excel as the true leaders. Consider this reflection by a presenter on the evaluation process:

We first started doing evaluations because we had to do them. It wasn't something that we were trained in or good at. Sometimes these compilations weren't gathered in any thoughtful or strategic way. Then, when we came up with this idea to use evaluations as learning tools to identify best practices and learn from our mistakes, they became really helpful. It's less an issue of trying to blame and more of "things screwed up, how do we learn from what we didn't anticipate?"

Kim Chan, Washington Performing Arts Society

Reporting to funders. We tend to worry about what and how to report to funders, particularly if some of the information in our evaluation is mixed. Funders do not expect you to be perfect, but they want to be kept informed about your programs. You may choose to produce internal and external versions of the report, whereby the former reports on internal minutiae that is important to your staff and the latter version is shorter and speaks to over-arching themes that are more suitable for public distribution.

THE FUNDERS' PERSPECTIVES

The eight funders who were interviewed to share their perspectives on evaluation all felt that evaluation was either very important or growing in importance to their institutions. Several talked about anxieties on the part of arts grantees to talk about evaluation.

Organizations don't tell us firsthand much about their anxieties. I hear it around when I am visiting other places, from cultural organizations that are not our grantees. They triangulate the conversation because it does not feel safe to have it directly.

Marian Godfrey

On the timing of evaluations. Funders encourage organizations to begin the evaluation process early on and continue it throughout the project period.

In the face of anxiety, people tend to close their eyes until they have to confront it when the project is over, but then the product is not going to be as useful or informative as it would've been if baseline information was gathered before the project got underway.

Rory MacPherson

On self-assessment: A critical component of evaluation. Funders encourage organizations to incorporate their insights and self-assessment into the evaluation process and to use this honest and frank approach to make decisions and improvements.

At Lila Wallace, we try to help people understand in their own practice the value of data analysis and incorporating their research into the decision-making of the organization. That is equally important an aspect of evaluation to us as understanding any individual project's outcomes.

Rory MacPherson

On data collection: Quantitative versus qualitative methods and outcome monitoring. Funders compared uses of quantitative versus qualitative information, stating that numbers only tell part of the story. They cited the importance of documenting outcomes as part of the evaluation process.

The legendary Peter Drucker had a wonderful editorial in The Wall Street Journal about the fact that we need to measure, not count. The fact is, we tend to count a lot but we don't necessarily measure. As an American society we're obsessed with numbers, which unfortunately can be very reductionist and distort the picture because it can very narrowly define what's happening.

Jane Polin

We try not to impose our sense of what outcomes should be, because organizations are so wildly diverse in terms of type and constituency served. We ask them to think and talk to us about their projected outcomes.

Marian Godfrey

Indicators of success. Funders articulated the need on the part of arts practitioners to select indicators that are appropriate to their own organizations and projects. What is appropriate for one artist or organization may or may not work for another.

In the arts, people think that most of the impact is ephemeral or immeasurable. We encourage people to think very hard about ways to actually capture in hard numerical form those elusive qualities that can include people's impressions. There are ways to measure in very clear and concrete ways peoples' changes in behavior and attitude…

Rory MacPherson

A start-up organization has one set of indicators called "survival" and an organization that has been around and established and trying to figure out how and in which direction to grow has a whole different set of issues. Picking the right indicator is the hardest thing to do. If you can't define what your problem is, what your goal is, then collecting data, which may not be relevant, is meaningless and a waste of time and money for everybody.

Jane Polin

It's [an issue of] how to elicit knowledge. When we have this conversation with our artistic project directors, you get everything from "I don't know how to answer that question," to "why do I have to talk about the impact of the symphony orchestra concert?" But you can do it

Marian Godfrey

On dealing with mixed findings: Communication is key. Communication before and throughout the grant period is key to enabling funders to understand and assist you with any difficulties. When programs and their related evaluations do not go according to plan, funders want to know about it. They are much more likely to understand—and be flexible—provided they are told.

I encourage organizations whose grant requirements include having to demonstrate progress, to talk to the funder or the entity they feel intimidated by. Ask for help or guidance in putting together a strong evaluation plan. The earlier you can have that discussion with who you are reporting to, the better the ultimate measures and the product of evaluation will be.

Rory MacPherson

It is pretty common for our grantees to call, which indicates to me that there is some kind of self-awareness that as the project changes, it is important to be in touch with any funder…Most of us want the applicant to succeed in whatever it is and not fail. You have to work with your funding partners to make that happen.

Douglas Sonntag

We want to see organizations change to meet their circumstances. You don't go to your boss with a problem, you go to your boss with a solution. I would expect a responsible organization to do this by saying "this is the problem and here's how we are planning to address it." Fear is paralyzing. Inaction is sometimes an extremely wise course. But to the extent that fear is seen as an inability to deal with the real world, it's detrimental to the reputation, as well as the reality, of the organization.

Jane Polin

On learning from their grantees. Honest evaluations that include insightful self-assessment and problems encountered, help funders to understand and respond to grantees' challenges and needs. Funders value this learning process.

One of the highest values we espouse and reward in our programs is self-reflection and honest self-critique. We are much more likely to be persuaded by an organization, artistic director or leader who is willing and able to say "this isn't working, I think this is why it isn't working and this is what I need to do to get it to work." We talk a lot about…the ability to engage in that kind of conversation and candor.

Marian Godfrey

Funders look to grantees' evaluations to determine if their funding programs are effective.

We have now given out over a three-year period forty-six operating support grants to forty-six organizations [based on the belief that] they will actually get better at doing what they do. We have to figure out how we can take the information we have gathered from individual organizations and figure out, as a strategy in the aggregate, did that happen?

Marian Godfrey

It is becoming more incumbent upon on all of us to look at evaluation or we won't know what our best practices are.

Katherine Freshley

However, funders cited the need for clarity in their evaluation requirements.

Many funders who are asking for evaluation from their grantees are not necessarily being clear about what they want. I think it's perfectly appropriate, necessary and desirable for grantees to clarify the expectations so that both sides aren't disappointed at the end of the day.

Jane Polin

The clearer we are up front about what we want out of our evaluation or progress reports, the better the groups are going to be at giving us what we want and learning from them.

Katherine Freshley

On the question of cost. Funders compared the cost of conducting an evaluation to the long-term cost of not evaluating. They caution organizations from undertaking large-scale evaluations if not warranted and to assess costs ahead of time.

Based on my experience here at GE, measurement is expensive. It is not something that happens by magic. Somebody actually has to collect data, report it and analyze it. The question is, is it worth it? Is the expenditure going to be, relative to the project, relative to where you are trying to go with your work, worth it?

For many organizations a good evaluation is a launching pad to a much larger initiative.

Jane Polin

[Without evaluation] You are not effective. You are less likely to achieve what you set out to achieve. And in this results-oriented, outcomes-orientated world, you may lose your funding. It's a really high cost. There is a high cost to us, which is loss of effectiveness as a grant maker.

Marian Godfrey

On the importance of dissemination. Funders cited the importance of disseminating evaluation results so that other arts practitioners can learn from them.

A lot of the best evaluations collect dust because people are not very good at disseminating them. Living in an electronic information age, we have all sorts of vehicles that allow us to disseminate lessons learned in much more efficient ways. Part of it is exposing an organization's strengths and weaknesses to an outside world to say "here is what we learned."

Jane Polin

If the way that you assess and evaluate your project helps you to talk about it better, then it helps us to disseminate the information better, which is part of the purpose of Arts Partners—to understand and disseminate.

Anthony Tapia

CONCLUSION: On taking a proactive role

Preparing these three sections has reaffirmed one priority: it is time for artists and arts organizations to play a proactive role in the evaluation process by setting and monitoring their own indicators of success. Otherwise, the existing—but often inappropriate—standards for other fields such as social science and health will continue to be applied to measure artistic success and the anxiety about evaluation will perpetuate itself. Interestingly, a number of funders expressed this same priority. With the support of organizations such as TCG, I hope that these articles help spark a national dialogue to debate, correct and expand the ways in which the important work that happens in the arts field is described, assessed, quantified and qualified.

Artists and arts organizations have to take control of the dialogue about how you qualitatively assess work…otherwise the terms will be determined for them by someone who does not understand.

Marian Godfrey

Every sector of our society has to do it. Everybody believes in accountability. You want your politicians, your educational system, your transportation system, to be accountable. We are not going to get away from this issue just because we are artists. But, controlling how it happens and applying our own imagination to it as arts people is the way to do it, rather than having it done to us in unimaginative ways that don't connect.

Greg Rowe

FUNDERS SPEAK ABOUT COMMON MISCONCEPTIONS

Timing

The biggest misconception is that you can evaluate something after the fact without having designed it with evaluation in mind. You can't do a usable and helpful evaluation on something that doesn't connect to specific objectives that you set for it and that you know can be evaluated, up front.

—Marian Godfrey

Role

Arts organizations don't see it as part of what they do every day. They see it as attached, rather than integrated….Organizations think they need to prepare evaluations that satisfy our needs. The applicants who take it more seriously see a larger role for it.

—Anthony Tapia

Scope and Cost

Very often, organizations think it takes a lot of resources to even begin evaluating… that it has to be comprehensive, large in scale, so it seems out of reach….that evaluations need to be formal and provide a big report.

—Anthony Tapia

Information Gathering Process

Organizations think that anecdotal information can be discounted completely: Stories, in many ways, are the way people learn and can be emblematic of a situation…sometimes columns of numbers don't tell the whole story.

—Rory MacPherson

RESOURCES

The resources below will assist you in evaluation design. Refer also to the additional resources at the end.

Program Evaluation in General

Gray, Sandra Trice and Associates, with Independent Sector. Evaluation with Power. Jossey Bass, San Francisco, 1998. A book on conducting "coevaluation," or ongoing evaluation of programs to increase effectiveness, empowerment and excellence. Includes guidelines on selecting and working with consultants.

Patton, Michael Quinn Utilization Focused Evaluations. Sage Publications, Thousand Oaks, CA. 1997. A guide to designing evaluations that is useful and relevant to organizations written by an expert in the field.

Questionnaire Design

Salant, Priscilla and Don A. Dillman. How to Conduct Your Own Survey. John Wiley and Sons, Inc. New York, 1994. A guide to writing surveys, selecting respondents and reporting findings.

United States General Accounting Office. Developing and Using Questionnaires. Program Evaluation and Methodology Division, 1993. Available for free. Call 202/512-1800 and request publication GAO/PEMD-10.1.7. A guide to writing effective survey questions.

Focus Groups and Interviews

Krueger, Richard A. Focus Groups: A Practical Guide for Applied Research. Sage Publications, Thousand Oaks, CA, 1994. An excellent book on planning, conducting and analyzing focus groups by one of the foremost experts in the field. Dr. Krueger also conducts training in focus groups several times per year at the University of Minnesota.

Patton, Michael Quinn. How to Use Qualitative Methods in Evaluation. Sage Publications, Thousand Oaks, CA. An in-depth guide to designing and asking questions effectively.

While the resources below provide an overview, it is highly recommended that those interested in conducting ongoing program evaluation attend courses in research methods and statistics, which are available at most colleges and universities.

Innovation Network. The nonprofit organization InnoNet maintains a website of evaluation resources. Parts of the site are under construction during the spring of 1999, but you can still visit it at www.inetwork.org or call 202-728-0727 for more information.

Callahan, Suzanne. A Guide for Using Microsoft Access for Qualitative Analysis. 1998. Contact Callahan Consulting for the Arts at tel: 202/955-8325; e-mail: callahan@forthearts.org. Please note that understanding this guide requires an advanced understanding of MS Access.

"Planning for Success: Success is a Journey, Not a Destination." Allison Fine, MS. NIDR Forum, January 1997. This article addresses the importance of planning in developing and evaluating programs.

Lamont, Ann. Bird by Bird: Some Instructions on Writing and Life. A humorous guide to embarking on the writing process. Easy to read and applicable to all kinds of writing.

Singleton, Royce A., with Bruce C. and Margaret Miller Straigs. Approaches to Social Science Research. 1988: Oxford University Press, New York. A basic textbook on research methods and statistics.

Washington Performing Arts Society. Best Practices for Successful Partnerships. A summary from three of their evaluations for the Lila Wallace-Readers Digest Fund's Audiences for the Performing Arts Network that was referred to in these articles. To obtain a free copy, contact Suzanne Callahan Consulting for the Arts.

Wholey, Joseph S., Harry P. Hatry and Kathryn E. Newcomer, eds. Handbook of Practical Program Evaluation. San Francisco, Jossey-Bass Inc., 1994. This handbook provides suggestions about evaluation that are likely to provide useful and reliable information at an affordable cost. Chapter authors are some of the foremost experts in the evaluation field.

For a catalog of books, journals and software (such as SPSS, QSR Nudist and Ethnograph) related to program evaluation and research methods, contact: Jossey Bass, tel: 800/956-7739; website: www.josseybass.com. and/or: Sage Publications, tel: 805/499-9774; website: sagepub.com.

After being a dancer and national arts funder for many years, Suzanne Callahan founded Callahan Consulting for the Arts in Washington, DC in 1995, which helps artists and arts organizations to realize their vision through an interactive, comprehensive system of strategic planning, resource development, program evaluation and meeting facilitation. For more information, contact Suzanne at callahan@forthearts.org or visit www.forthearts.org. Her acknowledgements go to Anthony Tapia, senior director of cultural participation programs for the Association of Performing Arts Presenters, for input in this article and to her associate Monique Nowicki.