



Evaluation Policy and Procedure

1 Background and Context

Since inception Collective Encounters has been committed to evaluating its work and has engaged participants, stakeholders and audiences in assessing the quality and value of its initiatives. It has been honest in its reflections and open in disseminating its findings. We are constantly seeking to improve our work and extend our reach; and recognise that embedding the learning from our past experience into our future planning is vital. In order help us do this and to ensure a more strategic approach to evaluation in the future, we have produced this Evaluation Policy. This delineates between monitoring, evaluation and advocacy; sets out what we understand by terms such as high quality and excellence; and identifies how we propose to measure our impact on social change. This policy will be reviewed annually by Collective Encounters' board of directors; and each year a new evaluation action plan will be produced by the senior management team, in collaboration with staff and stakeholders.

This policy and the supporting documentation have been strongly influenced by Collective Encounters' participation in LARC's Thrive Evaluation Programme; and informed by an extensive range of publications (for a bibliography please see Appendix 1).

2 Distinctions and definitions

2.1 Feedback, Monitoring, Evaluation and Advocacy

Collective Encounters recognises the difference between feedback, monitoring, evaluation and advocacy; but understands that sometimes the lines between these distinct processes can become blurred. Consequently it is helpful to define what we understand by these terms:

Feedback: information gathered about someone's reaction to a process or event

Monitoring: keeping a continuous record of appropriate data, and progress towards goals

Evaluation: assessing the success/failure, worth/value and quality of something; and learning lessons that inform and improve future practice

Advocacy: promoting the work in order to garner support

2.2 Excellence and Quality

Defining what we mean and understand by concepts like high quality/excellence is more complex. As a general principle we adopt the following interpretation which we believe sits very comfortably with our work and our ethos:

"Excellence in culture occurs when an experience affects and changes an individual...If culture is excellent it can help us make sense of our place in the world, ask questions we would not otherwise have asked, understand the answers in ways we couldn't otherwise have understood and appreciate things we have never before experienced...The greater its power to do these things, the more excellent the cultural experience." McMaster

This is something to which we aspire. Similarly we aim for all our work to be of a 'high quality'. In order to assess whether our work actually is excellent and of a high quality it is necessary to make these aspirations more tangible. We have produced a set of quality indicators against which we can evaluate our creative processes, products and management.

2.3 Quality Indicators

Process

For Collective Encounters, a high quality process is

Inclusive: participants are treated equally and fairly; their contributions are valued and their differences are respected; the environment is safe.

Creative: the process involves artistic and creative development for all involved; it is exciting, fun and enriching; it increases understanding and appreciation of theatre and the arts.

Challenging: participants are encouraged to ask questions and explore ideas that they might not otherwise have done; and to try out new ways of tackling old situations.

Empowering: participants are supported to make sense of their place in the world, to think in different ways, to break down barriers and challenge received wisdom.

Responsive: to the needs of individuals and the group; as far possible, the process and subject matter are guided by participants; and there is a strong sense of ownership.

Developmental: the process offers opportunities for progression, the chance to develop new skills and affects or changes participants in a way that they deem positive.

Product

For Collective Encounters, a high quality product is:

Exciting: in its theatricality, invention, ambition and communication of ideas; reinforcing the value and distinctiveness of live performance.

Provocative: in stimulating its audience to think in new ways, ask questions they might otherwise not have asked, offering new insights to old problems, and challenging the status quo.

Technically accomplished: demonstrating an appropriate level of technical expertise, sound production values and seamless delivery.

Important: in helping us to make sense of our place in the world, lifting the audience above the realm of the day to day, offering something beyond simple entertainment; and holding the possibility of change.

Management

For Collective Encounters, high quality management is:

Clear: aims and objectives are set at the beginning of projects and all staff understand what they are working towards; job descriptions and management processes ensure that all staff understand their roles and responsibilities

Consistent: management and delivery processes follow consistent policies and procedures, which are able to be flexible and responsive where necessary

Progressive: opportunities are sought for CPD and progression for staff and freelancers where possible; new partnerships are sought out; new funding streams are explored; new areas of work identified.

Collaborative: everyone working with the company is treated fairly; lines of communication are open; staff and participants are involved in decision making; partnerships are nurtured effectively; creative processes are collaborative.

2.4 Social Change

All Collective Encounters work is focussed on contributing directly to positive social change. We believe that our society is inherently unequal and our work focuses on tackling this. For Collective Encounters social change can occur on three levels: personal, civic and political. In order to evaluate how successful our work has been in contributing to social change we have set out the kinds of transformations excellent theatre for social change can help to achieve.

2.5 Social Change determinants

Personal transformations are likely to include:

Empowerment: people feel that they have had their voices heard; that they and their opinions matter; that they have the capacity to bring about changes in their world; have widened their horizons and lifted their expectations; have an increased sense of self-determination and of how they are perceived by others

Skills development: people have learned new, or enhanced existing skills. These may be inter-personal skills, life skills, creative skills and/or subject/topic specific skills. They may have improved coping strategies and increased knowledge.

Confidence and wellbeing: people have increased self-esteem, self-belief; perhaps an increased optimism for the future; they may have improved physical and/or mental wellbeing; they may feel happier; and have an increased sense of achievement.

Attitudinal change: people think about things in new ways; are perhaps more open minded and more questioning; have an increased understanding of their rights and responsibilities as citizens; and an/or increased understanding of important life issues

Such transformations may help to alleviate the impact of poverty, improve life chances, lead to better educational attainment, improve job prospects, and result in happier, more active citizens.

Civic transformations are likely to include:

Social capital and cohesion: barriers have been broken down between groups; social isolation is lessened; new networks are formed and friendships are forged; there is an improved understanding of cultural difference; and increased tolerance.

Identity and belonging: group identity is formed or found; individuals identify themselves positively as part of a wider group or community; there is an increased sense of pride in the group or community; groups are self-defining.

Attitudinal change: perceptions of marginalised groups are improved; public awareness of an issue is raised.

Such transformations may contribute to improved local democracy and civic engagement, lower rates of crime and anti-social behaviour, regeneration, and stronger communities.

Political change is likely to include:

Provision: positive changes to the ways in which services are delivered.

Policy: positive changes to public/social/political policies.

Culture: positive changes to the operational culture of an organisation; or the prevailing mind-set of a community/group.

Political activity: an increase in people voting and becoming more actively involved in decision making/local democracy.

2.6 Aims, Objectives, Outputs and Outcomes

All our projects will be clearly set out to distinguish between and articulate:

Aim: the one over-riding aspiration of the project

Objectives: the activities which will enable us to achieve this aim

Outputs: quantifiable components which relate directly to the objectives

Outcomes: the changes that will be made; achievements in the progress towards our Aim

3 Monitoring and Reporting: Data Collection

3.1 Intent and Sharing

We will collect appropriate statistical data from all aspects of our work in order for us to monitor project use, in line with our Equal Opportunities Policy, Diversity Action Plan and various funding agreements. The collection of this data will be at the discretion of the project coordinator and will not be invasive to participants or audience members.

Data will be shared with funders and stakeholders as and when required.

All monitoring forms referred to below are included in Appendix 2.

3.2 Workshops

Lead facilitators will be asked to complete monitoring documentation and to submit this in a timely fashion to the project coordinator. This will ensure we have up-to-date monitoring information as we need it and as we are required to report. It will also enable us to track project use and assess how we are doing in terms of recruitment, diversity and other targets. This in turn will help us to identify and trouble shoot potential problems and respond to changing or additional need.

For outreach workshops and short-term projects (less than 5 sessions) the lead facilitator will be asked to complete a Workshop Monitoring Sheet after each session and to submit this to the project coordinator.

For longer-term projects and on-going programmes the lead facilitator will take a weekly Register which s/he will pass to the project coordinator at their regular project management meetings. Towards the end of longer-term projects and at six-monthly intervals in on-going programmes the lead facilitator will work with the group to complete the Statistical Data Sheet. S/he will explain to the group why it is important for us to collect this data and how it will be used; and will invite participants to self-determine which 'boxes' they fit into. These will be passed to the project coordinator, who will invite staff to self determine and complete the other sections. The final completed statistical data sheet will be included in the End of Project Report (see below).

3.3 Performances and events

Show Reports will be completed by the stage manager at each performance or event. These will be forwarded to the project manager who will take any necessary action and collate the data, inputting it into the statistical data sheet at the end of each project.

3.4 Annual Reporting

At the end of each year the project coordinator/s will submit their final statistical data sheet/s to the senior management team. The final statistics for the year will be collated and included in the company's annual report which will be disseminated to funders and stakeholders, and made publicly available via our website.

4 Feedback

4.1 Intent and Sharing

Collective Encounters is committed to gathering feedback from participants and audiences to help us improve the quality of our work and enable us to tailor the work more specifically to meet their interests and needs. We have consistently sought feedback from all stakeholders and used that feedback to inform evaluation, planning and development. This policy formalizes that process.

People offering written feedback or direct quotations will be asked for permission to use their words for advocacy and/or reporting purposes. Such feedback may be included in annual reports and other documents to be shared publicly.

Feedback will be informally given to and sought from partners at regular meetings throughout the project delivery.

4.2 Workshops

Every workshop session will end with brief creative feedback exercises during which participants will be invited to share what they've enjoyed or learned; what they'd like more of; what they'd like to do differently; and what they haven't enjoyed. This should last between 5-15 minutes depending on the length and nature of the session. Facilitators will be expected to respond to this feedback and ensure it influences their future work with the group.

For outreach workshops (lasting less than 5 sessions) this feedback will be noted down by the lead facilitator on the Workshop Monitoring Sheet. The facilitator will be expected to incorporate feedback from sessions into her/his practice and future planning and will be supported to do so by the project coordinator. The facilitator will also note her/his own feedback on the sheet as an aide memoire for future planning; and any feedback they may have for the company to improve our service delivery. This will be channelled by the project coordinator to the senior management team in the end of project report (see below).

For longer term and on-going projects facilitators be asked to complete monthly update sheets and to pass these onto the project coordinator and senior management team at regular project management meetings. As with all our work, they will be expected to build feedback into their planning and their work. Lead facilitators will also write a regular blog on the Collective Encounters website where they feedback their experience of the project and its progress to a wider audience. Participants will also be invited to blog in this way.

If participants wish to give feedback to Collective Encounters not via the workshop facilitator, they will have access to the project coordinator and/or the Artistic Director at regular points in person and also via phone or email.

4.3 Performances and Events

Audience Feedback Sheets will be distributed by the stage manager at the end of each performance. These will invite the audience to feedback their thoughts on the quality, content, context and experience of the show, and will explain how that feedback might be used. These will be collated by the project coordinator, then fed back to the creative team (including performers) and the senior management team.

Feedback will be gathered from the performers and artists involved as to their assessment of the quality of the piece and their experience of the process. This will be gathered through structured group discussion facilitated by the project coordinator. Notes will be kept and fed into the final report.

5 Evaluation

5.1 Values

We recognise that the cycle of any project includes planning, delivery and evaluation.

We believe that good evaluation will help us to understand what we are doing well, where we struggle, what we are achieving and what impact we're having. It will help us to consistently develop and improve our work; support innovation; and enable us to contribute more effectively to the wider field.

We will draw on and value direct testimony from those who have engaged with us, and strive to find imaginative ways of capturing the qualitative experience. These stories will provide a vital measure of impact, helping us to assess cultural and social value. We will give equal weight to the responses of all involved, regardless of professional, or other, status affording no monopoly on insight or judgement.

We will be open and honest with everyone involved in the evaluations as to why we're evaluating the work and how any arising reports will be used. Usually our evaluations will be distributed to stakeholders and funders; all who have been involved in the evaluation process or part of the project in question; and made publicly available on our website. Elements of the reports maybe re-worked to be published more widely in order to contribute to debate in the wider field. Before reports are published, we will negotiate with those who have contributed their views for accuracy, fairness and relevance.

5.2 Process of Annual Evaluation

At the beginning of each year the senior management team will set out the creative, political and strategic aims of the year's programme. Within this framework, each of our projects will have its own set of aims and objectives, which draw on our quality indicators and social change determinants, and, as outlined above, are informed by our partners and participants. Each project will be evaluated against these aims and objectives; will incorporate feedback from all stakeholders, and will be written up by the Project Coordinator in an End of Project Report (for a template for this report see Appendix 3) which will be made available to all stakeholders.

In addition to this report, each year, after consultation with staff and stakeholders, the senior management team will produce an annual evaluation plan. This will identify which projects will be subject to additional evaluation. Projects may have an additional evaluation question with a specific focus, with the intention of helping us learn something new about our work. The evaluation plan will identify additional evaluation strategies/approaches to be used on specific projects. For instance, which projects will use peer review, post-show audience follow up, focus group discussion and other techniques. We will aim use a wide range of creative methodologies to evaluate and gather feedback on our work. We will strive to ensure that the processes we employ are not burdensome to the people involved and that they in no way impair enjoyment of the creative process or product; we will support artists to use their creativity in developing interesting approaches to evaluation.

At the end of the year the senior management team will draw on these reports to produce an end of year report which will evaluate the company's success in achieving its creative, political and strategic aims for the year. The learning from this will directly inform planning for the following year.

5.3 Evaluating short to medium term outreach projects (between 5 sessions > 6 months)

Clear objectives will be agreed during the set up for each project through discussions between Collective Encounters and the partner organisation/s. These will be communicated to participants in an early session; and time will be taken at this point to creatively explore what the participants hope to get out of the project. These ideas will subsequently be fed into the project objectives in the relevant documentation.

We will conduct a one-session evaluation at the end of each outreach project. This will offer a post-event de-brief for the participants; and will enable us to gather feedback that will help us:

- continue to improve and develop our work
- understand how participants have experienced the project and what they got out of it
- understand how far they feel we have achieved our objectives

The artist/s leading on the project will reflect upon their own experience of the project and consider how far they feel we have achieved our project objectives. They will combine their own analysis with the feedback from the group and may be collated in writing or in a short audio/visual file and will be used to inform the End of Project report.

5.4 Evaluating long-term and on-going programmes (6 months +)

Participants on all our long-term and on-going programmes will be made aware of the programme objectives either at the beginning of the project or during an induction process if they join the group later in its development. All participants will be invited, at the beginning of their involvement, to set their own personal objectives.

Workshop feedback will be used at every session, as outlined above. At approximately 6 monthly intervals a dedicated session will explore how participants feel about the programme, if it's meeting its objectives, if they're achieving their personal objectives; and what we could do to enhance and improve the programme.

At the end of long-term programmes a full session will be dedicated to evaluating how successful the programme has been in achieving its objectives; if there were any surprising or unexpected outcomes; and garnering any other relevant evaluative feedback. This will usually involve both the lead facilitator and another member of the creative team to be identified by the Artistic Director.

Evaluation will be sought from the artist/s who have delivered the project; project partners and other relevant stakeholders. This will be combined into the End of Project report outlined above.

5.5 Performances from the participatory programme

Feedback from audiences and performers/artists will be gathered at each performance as outlined above. In addition to this we will identify one show a year to which we will invite two peer reviewers with professional expertise, two members of our local community and the company's Artistic Director to give a detailed evaluative response assessing the quality of the product and the quality of the experience.

5.5 Professional Shows

Each professional show will involve feedback from audiences and creatives as well as peer, local community and Artistic Director evaluation as outlined above. This will help us to assess the quality of the product and the live experience.

In addition, evaluations will be undertaken with the creative, technical and management teams to gain an understanding of their experience of the creative process, of working with Collective Encounters, and their feelings about the final product.

Collective Encounters will devise ways of evaluating the success of the shows against the objectives the piece set out to achieve; and will invite analysis from other partners and stakeholders where appropriate to support and assist this.

5.6 Project/Company Management

Every three years Collective Encounters Senior Management team will engage in a thorough review of the company's operational practice. This will involve collating feedback and evaluation from staff, artists, participants and stakeholders pertaining to the management of projects and of the company. The Senior Management team will evaluate how effective the company has been in responding to criticisms and making improvements; where there is still room for improvement; and what actions are necessary.

External experts will be invited to assess the quality of the company's systems, policies and procedures as required.

A full report will be made to the Board of Directors and appropriate action taken.

5.7 Feeding back on the outcome of evaluation

We believe that it is important to feed back the outcome of evaluations to those who have been party to them. Consequently, End of Project Reports and Annual Reports will be made available to all stakeholders via our website and, where required, in hard copy. In addition an annual event will be held to celebrate the work of the company. This will be for participants, partners and professionals who have worked with us throughout the year. At this event we will share the evaluated outcomes of our projects and celebrate our achievements. We will also explain how feedback and evaluative comments have helped us to improve our practice, or changed things about the way we work.