Event Evaluation Instructor's Manual

5: Measures, Methods and Planning an Evaluation Project

Lecture 9

5.1 Introduction (p.48)

"Measures and methods become critical considerations when planning an evaluation project. Following from the discussion of a process model (paradigms, con- texts, purposes and uses) this chapter looks first at measures, including the development and use of key performance indicators, than methodological issues and evaluation models. The final part provides step-by-step guidance on how to plan both simple and complex evaluations, with emphasis on the 'logic model'."

5.2 Measures

"Metrics" refers to the ways in which things are measured. Many subjects of evaluation or impact assessment can be measured directly, especially if we use money as the metric, whereas other subjects require surrogate measures. For example, social impact assessment (SIA) relies a lot on individual perceptions, opinions and attitudes. There is an important discussion of "indicators" and "KPIs" that learners must master, as I use KPIs for the most part when specifying the things evaluators and impact assessors will measure. But it is also important to note that evaluators with stakeholders must develop their own KPIS taking into account context and ultimate uses.

5.3 Methodology and methods (p.50)

It might help to discuss methodology in the context of one or more traditional disciplines. What is appropriate in anthropology, especially ethnography, is not used in economics. Any research method could have a use in evaluation and impact assessment, so a grounding in research methods is essential for professional evaluators. Many methods are mentioned in this book, and some explained in more detail, but mainly for the purpose of suggesting what methods are available (see the "toolbox" sections).

5.4 Data and data collection (p. 51)

Both quantitative and qualitative material can be "data" for the purpose of analysis and evaluation. The first "toolbox" is presented in this section, covering the interrelated topics of content analysis, website and social media analysis.

Exercise:

Since almost everyone is a social-media user, a discussion of how to gain useful information from contents would be beneficial and interesting. Students might be asked to reflect upon their own sharing of event experiences with their social-media contacts, then develop a system for analysing such data. Consider the validity and reliability issues. Can you use Google Analytics or some other commercial service?

Checklists are so common and flexible that a Toolbox is devoted to description of the main types, and some useful resources. They are probably best used within a triangulated approach, that is using three or more methods to examine the same problem or goal.

Exercise:

Prepare (and if possible test) a checklist for a specific element in event planning or production. Have teams develop "diagnostic" and "merit" checklists, which are much more complex - considering who will use them, and how results can be interpreted. For example, a diagnostic checklist could be used to look for potential problems in audiences, linked to drinking, drugs, or rowdy behaviour (see risk management sources).

As an evaluation method the case study has to be designed to reveal what happened and why or how. Most so-called case studies in the literature are descriptive or historical in nature, and drawing conclusions about unrelated evaluation problems would be difficult.

Research Note (p.54)

Otteman, T. & Janes, P. (2014). It is time? Ending a long-term event. *Event Management*, **18**, 369–376.

This paper serves as a case study that can help develop theory, and might provide guidance to those evaluating emotional attachment and event termination. Evaluators should ask: can we use the same methods? does that one case provide us with a theoretical basis, or evidence, for drawing parallel conclusions?

Lecture 10

5.5 Planning an evaluation (p.54)

Stufflebeam provided a checklist for evaluation design that specifies the main evaluation project stages itemized below. (Source: https://wmich.edu/sites/default/files/attachments/u350/2014/evaldesign.pdf)

Keep in mind the "evaluation contexts" discussed earlier, as this planning model of Stufflebeam is for a formal project that will end with a report. An important element is the KEQ (key evaluation question). For each KEQ the evaluator will need specific metrics, such as the lists of KPIs that come later in the book.

Figure 5.3 is another Toolbox, this one containing common evaluation "models" - being either a methodology, like experimentation, or a general approach or framework that can be adapted to many situations. These have to be selected with an evaluation paradigm in mind (i.e., positivism and experimentation go together) and with regard to appropriateness and stakeholder buy-in. All of these models are given additional attention in the remainder of the book, except "time-series", as it is very difficult to implement and is usually employed only in forecasting demand. "Logic models" are explained right after the figure. Also look ahead to see Fig. 10.5 and the "orchestra model" with specific tools or methods for experience design and evaluation.

The first model is "deviation from specifications" and it is a very common approach to evaluation. Think of sport events that must be designed to meet rigid competition and venue specs, or sequential checklists that must be adhered to without fail, or performance metrics for staff and volunteers that define their competence. The evaluator must be certain that deviations are clearly documented and important, then give thought to how problems can be fixed. Or were the specifications faulty or necessary in the first place? See also the "five-gaps model" (pp. 125-6) which provides a guide to setting evaluation questions.

5.6 Logic models (pp.57-60)

Why do event designers or tourism planners think that their policies, strategies and actions will achieve certain specified goals? What is their logic, and can they put it into a model that evaluators can use to demonstrate goal attainment? It is such a simple concept, but when have you ever seen a formal logic model for an event or for a tourism plan? This section tells how to do one and use it for evaluation, with the steps summarized in Figure 5.4 and a graphical illustration is provided in Figure 5.5 (see below).

Exercise:

I suggest going through the logic-model process and the textbook example, then working in small groups to design a logic model for a hypothetical event or project of their choice. Note that single events seldom focus on long-term impacts, but normally set goals for "outputs" they can achieve and for which goal attainment can be demonstrated. But tourism or other agencies with event portfolios will take a longer-term perspective, leading to evaluation of cumulative impacts - that is illustrated along the bottom of the diagram. If an event does have the mandate or ambition to foster real change (such as social capital formation or cultural revival) then it has a much bigger design and evaluation challenge.
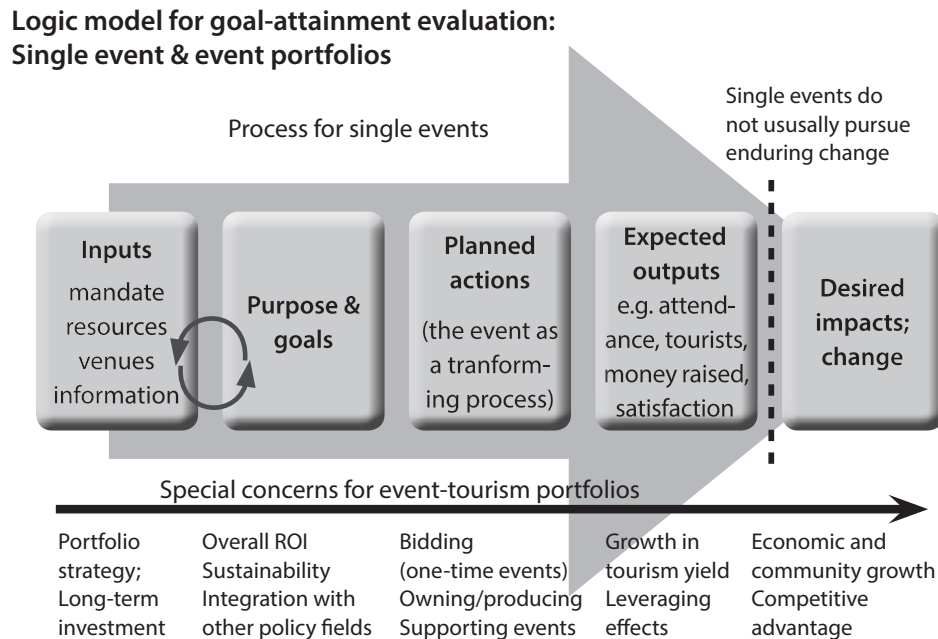
**Logic model for goal-attainment evaluation:
Single event & event portfolios**

Figure 5.5: Logic model illustrated

Theory of Change Models

Here is a short description of a Theory of Change Model, to be featured in the companion book Impact Assessment. It is similar to the logic model but intended for uses where social intervention and stakeholder involvement are important. A web search will easily reveal graphic illustrations and additional sources.

Quote from: http://www.theoryofchange.org/what-is-theory-of-change/

"Theory of Change is essentially a comprehensive description and illustration of how and why a desired change is expected to happen in a particular context. It is focused in particular on mapping out or "filling in" what has been described as the "missing middle" between what a program or change initiative does (its activities or interventions) and how these lead to desired goals being achieved. It does this by first identifying the desired long-term goals and then works back from these to identify all the conditions (outcomes) that must be in place (and how these related to one another causally) for the goals to occur. These are all mapped out in an Outcomes Framework. The Outcomes Framework then provides the basis for identifying what type of activity or intervention will lead to the outcomes identified as preconditions for achieving the long-term goal. Through this approach the precise link between activities and the achievement of the long-term goals are more fully understood. This leads to better planning, in that activities are linked to a detailed understanding of how change actually happens. It also leads to better evaluation, as it is possible to measure progress towards the achievement of longer-term goals that goes beyond the identification of program outputs."

Questions

Q: Explain the meaning of KPIs and their use in evaluation.

A: Start with the meaning and use of "indicators", being things we look for when monitoring a situation of doing a formal evaluation. Some indicators are surrogate measures, others can be direct measurements of conditions. KPIs, as used n this book, are (like Key Evaluation Questions) intended to be the most important metrics - and so they must be determined within a given context.

Q: Give examples of both quantitative and qualitative methods and

measures that can be used in evaluating economic impacts.

A: A foundation in research methods will enable students to specify many qualitative or quantitative measures, but if economic impacts are the object of evaluation then the metrics will mostly be in terms of monetary costs and benefits. Possible qualitative measures: residents are satisfied and supportive of event tourism and its impacts on the local economy and jobs; stakeholders like community groups formally support the strategy; the event-tourism portfolio gets buy-in from all relevant agencies. Some imagination is useful here.

Q: Describe the main evaluation models that are available, mentioning the contexts in which you might use each of them. (A more limited question might focus on two or three of the more useful models in an events context, particularly deviation from standards or specifications, logic models, and ethnography).

A: This could be a simple repetition of Figure 5.3 plus an idea for each concerning an application. There are ideas for applications throughout the book.

Q: Describe the steps in designing a formal evaluation project.

A: 5.5.1 provides the details as recommended by Stufflebeam. A short version of this process (main headings only) might suffice.

Q: Draw a logic model, including all the key terms, for an event designed to generate money for a charity.

A: The model itself should be easy to replicate, with Figure 5.4 providing the description of each stop in its deign. A charity event is intended to raise money, but there might be other important goals.

Essay-Style

Q: Profile and analyse (from an evaluator's perspective) an existing event as to its goals and evaluation process. Is there convincing evidence of goal attainment?

A: this Q only works if the event is already familiar to the students from a guest lecturer or case study. OR, a hand-out could be provided, possibly with sufficient information for the students to deduce goals and evaluation process.

Q: Construct a logic model for a specific type of event and specify details of its eval- uation process. Is there theory to support the expectation of outcomes?

A: Construction of the logic model is straight-forward, but in an essay the answer should explain the underlying logic. There are few theories that lend themselves to theory-driven evaluations in the events and tourism realm, but with imagination almost any theory could provide a starting point - then the evaluation contributes to theory development. An alternative approach to answering this type of question is to draw from experience to suggest the logic.

Q: How would a time-series evaluation model be applied to an event-tourism portfolio managed by a destination marketing organisation?

A: This Q can only be answered if time-series has been discussed already, and even then some lateral thinking is required to apply it to event portfolios. A key point would be to show understanding of the portfolio concept as a long-term or permanent approach to maximising synergies and benefits from managing a range of events, leading to the deduction that data have to be analysed on trends such as growth in event numbers and sizes, their economic impacts, and audience reaction. Reliable tourism trend data will be essential.

Q: Design and test a diagnostic checklist for one aspect of event planning, logistics, or programming.

A: This type of question can work well following a class exercise such as that suggested earlier for developing the diagnostic checklist. Each student should be able to repeat what the team accomplished, and possibly add additional insights. The key to diagnostic checklists is the underlying theory or logic guiding the "where and how" to look for problems.