

In this issue:

## Getting the most from evaluation

### Making a start

Tips and tools for  
evaluating your project

Know where  
you're going

PLUS

Measuring what  
you've achieved

Top tips from  
other projects

# focus on... evaluation

I'm delighted to introduce the summer 2010 issue of *Heritage focus*. In this issue we turn the spotlight on evaluation, providing useful tips and insights into how it works and why it's so important.



Evaluation is about much more than gathering data. It creates an in-depth picture of your project's impact and provides a resource for planning new projects and making funding bids. Evaluation can help your organisation to take stock of its wider work and make improvements. It can also support the case for heritage in more general debates about, for example, the natural environment or community life.

For the Heritage Lottery Fund (HLF), your evaluation helps us to assess the effectiveness of our grants and spread the word about good ideas and successful projects. It also informs our future funding plans.

How does evaluation do all these things? Read on ...

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Front cover: As part of an HLF-funded scheme, children across the UK were invited to evaluate museums and advise them on how to improve their services for young people. Photo Jez Coulson/Insight  
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# Making a start

## Tips and tools for evaluating your project

Your evaluation should bring together all the evidence that tells the story of your project and compares its initial aims with its outcomes. To show how your project changed things, you'll need to gather information before it starts and after it finishes. Evaluation should begin early, while you are still planning the project. Here are some of the areas you should think about.

### Numbers and stories

What sort of information do you need? Figures are useful, like visitor numbers, or the numbers of families or other groups involved in your project. The other numbers we are interested in are to do with the volunteers who worked on your project, and any people who received training. Keep track of these figures – but remember that they won't tell the whole story.

You'll need to talk to people who are directly involved in the project and those it reaches in other ways. Start by finding out what people expect of your project. Afterwards, ask them how it changed things. Keep a record of what people tell you, and put together a sample of responses. Some clear themes will probably emerge. These themes are an important part of your project's story.

## Start by finding out what people expect of your project. Afterwards, ask them how it changed things.

Be clear about how you will measure your project's success. Counting how many people took part is fairly straightforward, but there are many other aspects that can be included in your evaluation, like participants' or visitors' experiences. Look for quality as well as quantity. Sometimes the numbers may not be incredibly high, but the project may have made a big difference to the people who got involved. Ask them what they think.



If you set out to reach particular groups, you'll need evidence to show whether or not your project achieved this. If your project didn't meet all its aims, your evaluation is still very useful – it could help you and others to be more successful next time.

### The right tools for the job

Depending on the scale of your project, there are various approaches to evaluation. A tool that we have found works well with HLF projects is *Proving and improving: A quality and impact toolkit for social enterprise*. This is a step-by-step toolkit devised by nef (the new economics foundation). You can access it at [www.proveandimprove.org/new](http://www.proveandimprove.org/new)



The toolkit (left) includes two particularly useful exercises, Storyboard and Poster Evaluation. The Storyboard exercise can help with planning your project. It brings together a group of 'stakeholders' – people who are involved with the project or will be affected by it. The group discusses why the project is important, what it aims to achieve, and how it will do this.



- 1 The Rural Media Company set out to record the memories of older people from two farming communities in Herefordshire about their disappearing way of life
- 2 The Difference Engine project involved children with Manchester's industrial heritage and helped them learn new skills, including how to use sound-recording equipment
- 3 The Leeds Routes project aimed to help young people learn about cultural traditions, including Indian dance and Chinese martial arts, and share these through performances in the city

## Be clear about how you will measure success. Look for quality as well as quantity.

Poster Evaluation can be done both while your project is underway and after it has finished. This is a group activity based around a large interactive poster with a project timeline. It offers people the opportunity to reflect on what the project has achieved and what can be learned from it.

In the following pages, we talk to people involved in different heritage projects about how evaluation works in practice.

## Want to know more?

You will find more detailed information in our guidance documents *First steps in evaluation* and *Evaluating your HLF project*. These are available to download from [www.hlf.org.uk](http://www.hlf.org.uk). You can also request copies by emailing [enquire@hlf.org.uk](mailto:enquire@hlf.org.uk) or phoning 020 7591 6042.

# Know where you're going

Most heritage projects involve a range of groups and individuals. People may have different views about why the project is important and what it should aim to achieve.

Combining these views into a shared vision is one of the secrets of success. And a good way of doing this is to start the evaluation process early. If you are going to measure your project's success once it's finished, you need to begin with clear targets. This kind of evaluation is often called 'formative evaluation' - it helps to shape your project.

Once your evaluation process has been set up, you will be able to check as you go along whether your project is meeting its aims. Think of this as 'interim evaluation'. For this you can use activities like the Poster Evaluation exercise. Other useful sources include on-the-spot feedback from visitors and observation by project volunteers. Here's how two projects in London and Yorkshire started their evaluation.

## Setting the scene

"Set up your evaluation process right from the beginning," is the message from Common Voices. This local-heritage project based in Clapham, London, was about bringing different generations together to capture stories about growing up in the area after World War II.

Project co-ordinator Tricia Holland explains, "We benefited enormously from employing an independent evaluation expert (funded by HLF as part of the project budget), as well as being advised on evaluation by an HLF mentor. We also got some really useful ideas from HLF's Young Roots project-evaluation pack. This kind of

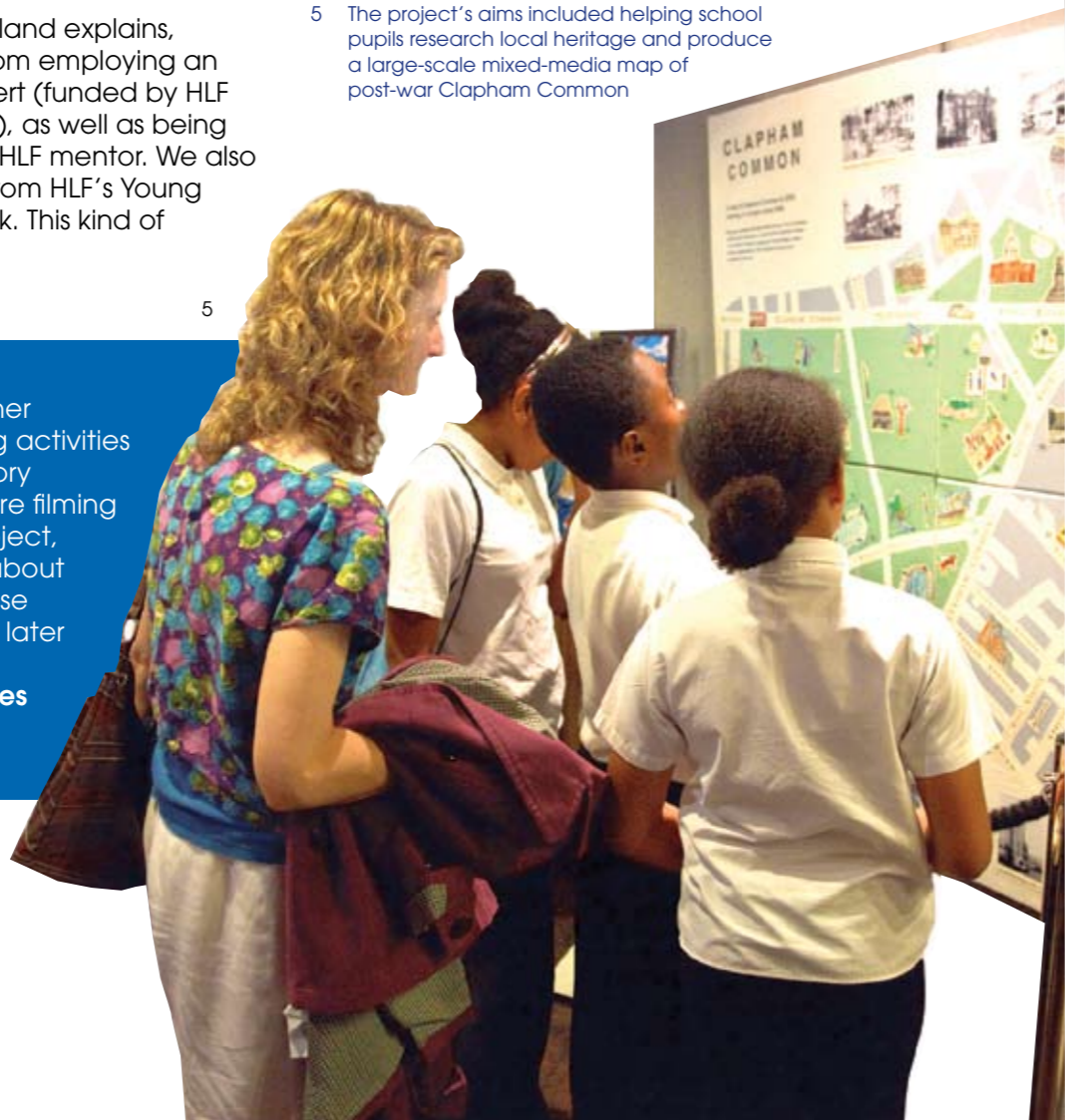
preparation meant that we were very clear about the project's aims. And because our evaluation plan was in place before we started, we could check progress against it right the way through."

- 4 Discussing the project's achievements
- 5 The project's aims included helping school pupils research local heritage and produce a large-scale mixed-media map of post-war Clapham Common

### Top tip

"Take the opportunity to gather evaluation information during activities like workshops or spoken-history interviews. When children were filming each other as part of the project, we asked them to talk a bit about their views of the project. These comments, recorded on film, later fed into our evaluation."

**Tricia Holland, Common Voices**



## A basis to build on

Viewed from the air, the snaking dry stone walls of Yorkshire's Upper Colne Valley look like a timeless feature of the landscape. But take a closer look, and you'll find that many are on the point of collapse.

The Upper Colne Valley Dry Stone Walling project aims to encourage awareness of just how much these traditional walls represent, in terms of community history and environment, and to revive the skills needed to maintain them.

"As a basis for our evaluation," says Neil Windett, countryside manager at Kirklees Council, "we did a detailed survey of the state of the walls before we started. We took sample areas of 1 sq km and asked volunteers to grade the walls from 1 to 5, depending on their state of repair. From the local authority, we gathered lots of environmental and social statistics about the district."

Taken together, all this data gave the project evaluation "a really firm foundation", observes Neil. "It has enabled us to see whether we're meeting our targets as the project progresses. And it means that we will end up with accurate measurements of the project's impact."



- 6 Volunteers from the Dry Stone Walling Association repairing a dry stone wall
- 7 The project's evaluation document

### Top tip

"Make contact with the relevant people in your local authority. They will have access to lots of information that could be useful for your evaluation. They may also be able to assist with data-management tools, allowing you to track your project's progress against the targets you have set for it." **Neil Windett, Upper Colne Valley Dry Stone Walling project**

# Measuring what you've achieved



## Arts of evaluation

**A**rt Alive in Norfolk Churches brought in artists, writers and craftspeople to run activities and exhibitions in 26 of the historic churches for which the county is famous.

Volunteers' main job was to ensure that the churches were open and welcoming. They recorded visitor numbers and types of visitors, such as family groups. "There's a perception that it is mainly older people who visit churches," says project co-ordinator Jennie Hawks. "In fact, we found a surprisingly good spread of ages."

Visitors and artists were encouraged to fill in a questionnaire. This simple method captured both quantitative (numbers, etc) and qualitative information (comments and responses). Evaluation highlighted some challenges – there were clearly lessons to be learned about publicity and signage – as well as the project's successes. "A lovely idea for using a church that is not much used" and "We need more of this in the villages!" were typical responses, suggesting that the project met its aim of linking historic buildings and present-day communities.

8 A paper-making workshop in Paston

9 Playing a traditional instrument at an event in Merton



Once your project has been completed, you will want to measure its impact. Did it change things in the ways you hoped for? What would you do differently another time?

The evaluation you do after your project has finished is called 'summative evaluation'. This is when you take stock of successes and, just as importantly, challenges. It is a chance to look at the lessons learned from the project.

## A flexible approach

**T**he Museum of London's Inclusion Programme involved 13 projects over three years. It aimed to engage people at risk of social exclusion with their heritage and develop their life skills. Participants included young people aged 16–25, offenders and long-term unemployed people.

A big part of the project was about building participants' self-confidence. Good qualitative data was therefore especially important for evaluation. "We developed a range of approaches," says the museum's inclusion officer, Lucie Fitton. "We had a template of questions, but we adopted a flexible approach to how we asked these, depending on the group or individual. To evaluate the benefits to participants we used the GLO framework." (For information on Generic Learning Outcomes visit [www.inspiringlearningforall.gov.uk](http://www.inspiringlearningforall.gov.uk))

How were participants' responses recorded? Some were happy to do a written questionnaire. Others felt more comfortable with one-to-one conversations. Post-project, the museum's

exploration of new approaches to qualitative evaluation goes on, including the use of audio-visual recording and project blogs.

In the project's final year the museum employed external evaluation consultants. "It was important for them to understand what we were doing," says Lucie. "They came to workshops, and we even took them to prison!" The evaluation identified successful outcomes in such areas as increasing participants' communication and team-working skills.

- 10 Young carers from Newham taking part in a photography workshop to help them develop a website about local history
- 11 Eleven young, long-term unemployed people created a large mural in a Brick Lane school playground, based on the history of the area. Other projects included engaging female offenders with the museum's collections and creating drama performances about London's past

## It's not the last word

Evaluation isn't only about proving that your project changed things. It is also about improving – part of a continuous process of learning and growth. We encourage all HLF-funded projects to disseminate their evaluation results, spreading good practice and useful data.

For the Museum of London, evaluation data plays a part in planning new projects. Information gathered by Art Alive volunteers was analysed by an independent evaluation team (funded through the project budget) and has led to setting up a volunteer training programme. The Art Alive evaluation has also been used by the regional tourism authority and the Diocese of Norwich.



11



# Interview



**“Evaluation is often integral to a project’s success,” explains Gary Jacobs, Executive Director of Groundwork Thames Valley**

**HF: What are your best sources of evaluation data?**

**GJ:** The most useful source are the people participating in the projects. Before a project begins, we work with stakeholders to identify outcome indicators, and we

regularly measure success against these. This approach works well for all ages. It enables us to recognise changes in participants’ attitudes, perceptions, enjoyment and understanding, and to identify possible improvements.

**HF: Do you give project staff training in evaluation?**

**GJ:** Yes. Training includes understanding outcomes and outputs, establishing indicators, collecting evidence, and working with people who may have difficulty expressing their opinions. Many project officers are trained to use *Prove it!* ([www.proveit.org.uk](http://www.proveit.org.uk)), an evaluation toolkit developed by us and the new economics foundation.

**HF: How does Groundwork integrate evaluation into heritage projects?**

**GJ:** Evaluation is often integral to a project’s success. For example, the West London Floating Classroom is running an £800,000, five-year heritage programme for schools, supported by HLF. Evaluation has been integrated into this project from the outset and has shaped its delivery, making it more learner-led and enabling it to address a range of abilities and age groups.

**HF: How has evaluation helped Groundwork to develop its own practice?**

**GJ:** Groundwork aims to improve people’s lives by providing opportunities to learn new skills, understand and value the environment, and be inspired to become active members of the community. Evaluation is key if we are to demonstrate that the money and time invested in our projects bring about tangible, long-lasting benefits.

## Capture and count

**T**he Northern Kites project set out to reintroduce the red kite as a breeding bird in the North East, an aim that it achieved in 2006 after a gap of 170 years. But this project also had ambitious aims to do with social involvement and contributing to the region’s economy.

Project manager Keith Bowey says starting evaluation early was the key to success. “Right from the word ‘go’ I gave the team two watchwords: ‘capture’ and ‘count’. I wanted them to gather every piece of hard data and qualitative evidence they could find.”

Armed with their impressive interim evaluation, Northern Kites persuaded the region’s main bus company to adopt the ‘Red Kite’ brand. “At first they were sceptical, but we could show just how much the community was involved, and the potential benefits to business.” The Red Kite bus service now takes thousands of people a day to sites around Gateshead’s Derwent Valley where they can watch the kites in the wild. The evaluation

was so effective in gaining support for Northern Kites, that the project finished well under budget, and the team was able to continue its work for a further seven months.

The project successfully encouraged schools across the area to ‘adopt’ a kite, helping pupils of all ages and backgrounds learn about the rare bird

