



BIROn - Birkbeck Institutional Research Online

Clarke, Richard and Mount, D. (2014) Evaluation guidance for landscape partnerships. Documentation. Heritage Lottery Fund, London, UK.

Downloaded from: <https://eprints.bbk.ac.uk/id/eprint/11637/>

Usage Guidelines:

Please refer to usage guidelines at <https://eprints.bbk.ac.uk/policies.html> or alternatively contact lib-eprints@bbk.ac.uk.



Evaluation guidance

Landscape Partnerships

February 2013 revised July 2014

If you require a copy of this guidance in an alternative format (large print, Braille or audio version), or if your first language is not English, we can provide it in the appropriate format or language if you ask us. It is also available in Welsh

Contents

1	Introduction	3
2	Evaluation in the Landscape Partnership programme	4
2.1	<i>Collecting information, and reviewing and reporting your progress</i>	4
2.2	<i>Outputs, outcomes and indicators</i>	4
3	Outputs and output data	9
3.1	<i>Deciding on outputs and setting targets</i>	9
3.2	<i>Output data collection</i>	9
3.3	<i>Table showing the categories for Landscape Partnerships output data collection</i>	10
4	LP outcomes and legacy	13
4.1	<i>LP programme outcomes</i>	13
4.2	<i>Baseline information for your LP scheme</i>	14
4.3	<i>Evaluation of individual projects</i>	14
4.4	<i>Evaluation of your scheme’s outcomes and legacy</i>	14
5	Evaluation techniques and tools	16
5.1	<i>Geology, wildlife, species and habitats</i>	16
5.2	<i>Works to built and archaeological features</i>	17
5.3	<i>Projects and outcomes involving people and communities</i>	17
5.4	<i>Benefits to social and economic well-being</i>	18
5.5	<i>Surveys, questionnaires and interviews</i>	18
5.6	<i>Evaluation using media</i>	20
5.7	<i>Sampling, analysing and presenting quantitative data</i>	22
6	Planning, resourcing and reporting your evaluation	23
6.1	<i>Resourcing your evaluation</i>	23
6.2	<i>Your final evaluation report</i>	23
6.3	<i>Structure and content</i>	24
6.4	<i>The process of producing your evaluation report</i>	26
7	Further sources of help on evaluation	27
7.1	<i>HLF’s ‘Evaluation: Good-practice guidance’</i>	27
7.2	<i>Geology, species and habitats</i>	27
7.3	<i>Archaeological and built heritage</i>	28
7.4	<i>People and communities</i>	29

1 Introduction

This guidance document will help you evaluate your Landscape Partnership scheme. You will need to refer to it:

- When preparing your first-round application to HLF;
- During the development phase as you plan evaluation and produce your Landscape Conservation Action Plan;
- During the delivery *phase*, as you update your project plans, develop your scheme to capitalise on new opportunities, and monitor activities and outputs; and
- As you review the outcomes of your work and produce your final evaluation report.

Your Landscape Partnership scheme evaluation needs to be:

- Built into your scheme from the start and reviewed regularly;
- Involve partners and local people. It is the responsibility of the whole partnership; and
- Built into delivery so that the administrative burden is reduced.

This guidance and 'Landscape Partnership Conservation Action Plan (LCAP) guidance' has been written to supplement the Landscape Partnership application guidance. All three documents can be found on the HLF website.

2 Evaluation in the Landscape Partnership programme

Evaluation is a process of researching, reflecting, and reporting on what your Landscape Partnership (LP) scheme has delivered, and what the long term benefits will be for heritage and people will be.

Evaluation has two purposes: one is about ‘proving’ – being able to demonstrate what you have achieved, and the other is about ‘improving’ – giving feedback to yourself and others about what has gone well, and what has gone less well, so that you can make adjustments and others can learn from your experience.

Every LP scheme is made up of a number of projects which may involve capital works and activities. Projects are delivered through a partnership of organisations, normally including statutory agencies, local authorities, NGOs and community and voluntary groups.

Evaluation of an LP scheme shows the impact of individual projects *and* the LP scheme as a whole. It cannot be left to external consultants, although you may need to pay for advice on some aspects.

2.1 Collecting information, and reviewing and reporting your progress

Collecting, reviewing and sharing information about your scheme is an essential part of the evaluation process, both for you and for HLF as a lottery distributor. There are three main ways this takes place:

- Expenditure is monitored by HLF grant officers, and they may also appoint an independent monitor to work with you and report to HLF;
- LP grantees make regular reports to HLF on their activities and work undertaken; and
- ‘Output data’ is collected across all schemes at regular intervals and used centrally by HLF and other agencies to evaluate the LP programme.

The reports that you submit with your quarterly financial claims to HLF and feedback written by monitors all contain some evaluation. Your final evaluation report will be the basis on which HLF ‘signs off’ your scheme and pays the final 10% of grant.

2.2 Outputs, outcomes and indicators

When considering evaluation, it is important to distinguish between outputs, outcomes and indicators.

2.2.1 Outputs

Outputs are measures of what your LP scheme has delivered through its projects, through activities or capital works. Outputs can usually be quantified and include things like the number of volunteer days, hours of training delivered, metres of wall rebuilt, area of habitat restored, or numbers of individuals involved in an activity. Outputs relate to the objectives of each project and need to be specified as targets in your LCAP.

2.2.2 Outcomes

Outcomes are the difference your scheme has made: its impacts on the landscape and heritage features, and its benefits for the people who live or work there or enjoy it as visitors. They relate to the aims and achievements of your scheme and to the nine LP programme outcomes. Many outcomes can be measured and may be the aggregate of project outputs. Other outcomes, in particular some of the benefits to people and communities, are less tangible and often captured by asking people to tell you about the changes they have experienced.

Indicators and evidence

Indicators are evidence for or measures of activity, achievement or condition, and relevant to outputs and outcomes. Different kinds of indicator are appropriate to different kinds of output or outcome. In planning your projects (and in drafting your LCAP) you need to think carefully about what the key outputs are and what indicators might be most appropriate.

Output indicators

Output indicators are usually 'counting' what each project delivers – for example kilometers of footpath works, the number of people attending community events, volunteer-days contributed.

Outcome indicators

Outcome indicators need more thought and you will usually need to look beyond outputs. Numbers provide a good foundation for evaluation but are not sufficient to present the full picture of the impacts of your scheme particularly when showing the longer-term benefits to people and communities.

Qualitative indicators

Qualitative indicators such as the opinions of people or the judgment of experts can also be important in evaluation. The numbers of LP community events held is a measure of your activity, and a record of the number of people who come along provides some measure of success. However both measures tell us little about the longer term benefits to individual participants, and less about the benefit to the community as a whole.

Most projects will have several outputs and will contribute to more than one of the outcomes of your scheme. For example the conservation of a historic building may have value in securing its future and at the same time attract visitors, secure jobs, provide an educational resource, and enhance the visual appeal of the landscape.

When planning your evaluation you need to identify the outputs, outcomes and the long-term benefits of your projects and your scheme as a whole, and think carefully about how these can be captured.

2.2.3 Nine examples of project outputs, indicators, outcomes and evidence relating to the nine HLF LP programme outcomes.

Example 1

Project output:	Habitat restoration on Heydon Berrow
Possible indicator:	20 ha of common cleared of trees and scrub.
Example of project outcome:	Heathland in good condition, increased connectivity grazing recommences.
Possible evidence:	New survey against pre-project baseline shows heather regeneration, return of sand lizards and nightjar.
LP outcome:	Heritage is better managed.

Example 2

Project output:	Rebuilding stabilisation of dry stone walls on Lower Loxley farm.
Possible indicator:	250m of dry-stone wall restored or stabilized.
Example of project outcome:	Stock-proof boundary complements and enhances 'traditional' landscape.
Possible evidence:	Fixed point photos of the wall before and after works.
LP outcome:	Heritage in better condition.

Example 3

Project output:	Barrow group on Lakey Hill recorded and documented
Possible indicator:	Records lodged with County Archaeologist. Ambridge Archaeology Group (AAG) produces pamphlet.
Example of project outcome:	Increase in understanding of the Ambridge Barrows, more people have access to this knowledge.
Possible evidence:	Sales or downloads of the AAG pamphlet. National datasets revised.
LP outcome:	Heritage better identified/recorded.

Example 4

Project output:	Volunteers trained in tree planting and coppicing to rehabilitate Leader's Wood.
Possible indicator:	Work of 25 volunteers (200 work days over 6 ha) approved by County Ecologist.
Example of project outcome:	Example of project outcome: Volunteers competent and motivated.
Possible evidence:	6 volunteers subsequently get involved similar work elsewhere. 2 people secure Chainsaw Certificate and hope to start arboricultural business.
LP outcome:	People develop skills.

Example 5

Project output:	Local schools develop a programme of farm visits.
Possible indicator:	3 Felpersham schools contribute a total of 240 pupil-visits.
Example of project outcome:	Example of project outcome: Increased knowledge of good farming practice and how this contributes to environmental quality.
Possible evidence:	Farm fieldwork integrated into primary curriculum. 2 schools ask for repeat visits. Some parents enquire about visiting independently.
LP outcome:	People learn about heritage.

Example 6

Project output:	Clearing & restoration of the Felpersham Canal.
Possible indicator:	200 volunteer-days contributed during project lifetime.
Example of project outcome:	Increased local awareness of canal & appreciation of its potential.
Possible evidence:	Local canal restoration group gains new members.
LP outcome:	People volunteer time.

Example 7

Project output:	HLS agreements secured for farms in the Am Valley.
Possible indicator:	8 Farm Environment Plans being implemented.
Example of project outcome:	Decrease in diffuse pollution reaching the River Am.
Possible evidence:	Possible evidence: Environment Agency River Condition Survey. Anecdotal reports, new licenses issued by the Am Angling Association.
LP outcome:	Environmental impacts are reduced.

Example 8

Project output:	Local theatre group develops production on a landscape theme.
Possible indicator:	Possible indicator: 5 performances attract audience of 200 people.
Example of project outcome:	People more aware of and committed to the heritage and stories featured in the play.
Possible evidence:	Ranger reports increased number of local people seen on sites; 10 new volunteers say their interest was triggered by the play.
LP outcome:	More and a wider range of people engage with heritage.

Example 9

Project output:	Co-operative branding, promotion & marketing scheme for local produce.
Possible indicator:	Distinctive logo and marketing materials produced. Publicity in tourist media and local retail outlets.
Example of project outcome:	A boost to Dorsetshire's local identity and economy.
Possible evidence:	50% increase in sales of Dorsetshire Blue cheese, more widely available in local outlets. Helen Archer takes on 2 additional employees. New producers join the scheme.
LP outcome:	Local area/ community is a better place to live, work or visit.

3 Outputs and output data

3.1 Deciding on outputs and setting targets

Your first-round application form will show what you aim to achieve and how you will do this. You will provide an outline timetable for the delivery phase and also your scheme costs. You'll need to have a good idea of what projects your scheme will include and how each might contribute to the nine LP programme outcomes (see Section 4 below).

If you are successful at first-round, during your development phase you will plan each project in detail, clarify what outputs will be delivered and how each project will contribute to the scheme outcomes. Part 3 of your LCAP will show target outputs for each project and the wider or lasting benefits. The targets you set should be ambitious but achievable.

During delivery, keep good records of what has been done and review your outputs on a regular basis. Your targets may change, and what each project delivers may vary from what you initially set out to achieve. This information will all help you to evaluate success – and where things could have been done differently in your scheme. Talk about any proposed significant changes to your scheme with your monitor and HLF grant officer.

3.2 Output data collection

A requirement for all LP schemes is to record your total predicted and/or achieved scheme outputs. This is collected in a standard 12-sheet Excel workbook supplied by HLF, and is submitted by the lead partner three times during your LP scheme as follows:

- 1 At the end of the development phase part along with your LCAP, showing aggregated target outputs across all projects;
- 2 In mid-delivery showing achieved outputs so far. Agree with your HLF grant officer the most appropriate time to do this; and
- 3 With your final evaluation report at the end of the HLF funding, showing the final outputs of your scheme.

This process keeps track of individual LP schemes, and also demonstrates what the Landscape Partnership programme has achieved on a national scale.

If you have kept good records of what each project has delivered then filling in your output data return should be fairly simple. The output data will also help you to produce your own evaluation report. The table below shows a summary of the data categories used on the spreadsheet.

3.3 Table showing the categories for Landscape Partnerships output data collection

Output data category	Data requested
1. Basic data	<ul style="list-style-type: none"> • Date of completion of this workbook. • Date of first-round award. • Actual or expected second-round approval and expected end date. • Area covered by your Landscape Partnership with OS Grid reference for centre point.
2. Advice and Support	<ul style="list-style-type: none"> • 8 categories of data collected e.g. landowners, farmers engaged, wildlife surveys undertaken, management plans written, successful agri-environment grant applications made or facilitated
3. Biodiversity and landscape features	<ul style="list-style-type: none"> • 39 habitat categories e.g. lowland calcareous grassland, restoration of PAWS, ponds, rivers, hedgerows. Data collected against 'maintain extent, achieve condition, restore or expand'. • 3 'Other Priority Habitats': dry stone walls, fencing, and individual trees Data collected against 'repair/restore' and 'new'.
4. Built heritage features	<ul style="list-style-type: none"> • Designations: 10 categories e.g. conservation area, listed buildings, scheduled ancient monument. Data collected against recorded, repaired, restored, conserved, interpreted or re-used. • Features: 11 categories e.g. village hall, commercial, domestic, residential, church, chapel. Data collected against recorded, repaired, restored, conserved, interpreted or re-used.

Output data category	Data requested
5. Industrial Maritime and Transport features	<ul style="list-style-type: none"> • 18 categories e.g. communications, food processing, mining and extractive, bridge/viaduct, ship/boat, water supply/drainage. Data collected against recorded, repaired, restored, conserved, interpreted, re-used.
6. Museums libraries and archives	<ul style="list-style-type: none"> • 7 categories e.g. archive, gallery, library, painting; sound and film. Data collected against catalogued, repaired, restored, exhibited, interpreted, stored.
7. Learning	<ul style="list-style-type: none"> • 7 categories e.g. primary schools worked with, colleges/universities worked with, youth groups worked with, community consultation events held. Data collected against number of events and beneficiaries • 19 categories e.g. learning resources, outreach visits to schools, vocational learning sessions for pupils/students, family learning activities, teacher training, oral history projects, open days, exhibitions/displays, tours/walks. Data collected against number of events / beneficiaries. Data collected against new/improved • 2 categories - guided walk projects and health projects. Data collected against number of events and beneficiaries. • 10 categories such as interpretation boards, leaflets, websites, blogs, informal community archives.
8. Access	<ul style="list-style-type: none"> • Area and linear access: 7 categories e.g. footpaths, cycle tracks, easy access pathways. Data collected against new or improved. • Trails, projects and equipment: 7 categories e.g. nature trails, heritage trails, erosion control projects • Data collected against new/ improved.
9. Visitors	<ul style="list-style-type: none"> • Annual visitor numbers (most recent recorded or estimated). • Age, gender, disabilities, ethnic and socio-economic profile of visitors.
10. Volunteers	<ul style="list-style-type: none"> • 2 categories: volunteer numbers involved and volunteer hours delivered. • Age, gender, disability, ethnic and socio-economic profile of volunteers.

Output data category	Data requested
11. Employment	<ul style="list-style-type: none"> • FTE jobs created, safeguarded each 4 categories (conservation and heritage; learning, interpretation and outreach, project management and administration, other). Data collected against internal/ external. • Age, gender, ethnic, disability and socio-economic profile of employees.
12. Training & Skills	<ul style="list-style-type: none"> • 2 groups of trainees: Land managers and rural businesses, and volunteers, each 8 categories e.g. land and habitat management, rural skills and heritage conservation, tourism and business development, apprenticeships, work placements. Data collected on number of people trained. • Age, gender, ethnic, disability and socio-economic profile of trainees.

We recognise that some of your data may be incomplete at different points of your scheme, and that there will be overlaps. Tell us about any limitations or other information that you may feel relevant.

4 LP outcomes and legacy

4.1 LP programme outcomes

Recording outputs can be a fairly straightforward task. Demonstrating how your scheme has achieved the nine LP outcomes and the scheme's future legacy needs more careful planning. Some things to consider are:

- Measuring differences involves 'before and after' comparisons. This can only be made if you have baseline information.
- Some outcomes are not easy to demonstrate, especially when this concerns intangibles. For example a programme of guided walks attracting a non-traditional group of participants (an output) might then have changed the way they engage with the countryside or a particular landscape. You could capture this change by recording their attitudes or expectations immediately before and sometime after the project in a short survey, but it is harder to do this with all the residents of your LP area.
- It is hard to completely connect an outcome to one project: the participants in your guided walks may also have been influenced by a television programme, for example.

The nine LP programme outcomes are listed below. When planning your evaluation process, think about how you will measure the difference your scheme makes as a whole to heritage, to people and communities. Your individual projects should also contribute to one or more of the nine outcomes, and you should describe these activities in your LCAP. The range of evidence you collect for evaluation will ultimately enable you to show the 'distance travelled' as a result of HLF funding. Decision-makers, stakeholders, local people and your partners will all want to understand what the lasting benefits of your scheme will be.

Outcomes for heritage – with HLF investment, heritage will be:

- better managed
- in better condition
- identified/recorded

Outcomes for people – with HLF investment, people will have:

- developed skills
- learnt about heritage
- volunteered time

Outcomes for communities – with HLF investment:

- environmental impacts will be reduced
- more people and a wider range of people will have engaged with heritage
- your local area/community will be a better place to live, work or visit

4.2 Baseline information for your LP scheme

Gathering baseline information is an important part of your development phase. The baseline data may relate to the aims and intended outcomes of your scheme as a whole, or for individual projects.

Some of your baseline data will already exist. You probably used information about the distinctive features, significance, condition and needs of your LP area when you put together your first-round application, and your partners will be able to help with this too.

Baseline data is also available from national datasets but the most relevant data is likely to have been collected locally. Your first source for information should be members of your partnership. Further information could be at local offices of country agencies, local authorities or bodies such as the Wildlife Trusts. Also consult local interest or lobby groups such as NFU, CPRE or rambler's groups.

4.3 Evaluation of individual projects

Similar principles apply to assessing the outcomes of individual projects. Collecting data is also a good way to raise the profile and value of the project locally. For example:

- Habitat restoration projects could include ecological surveys carried out by community groups and reviewed on a regular basis;
- The repair or restoration of built heritage could involve participants taking fixed-point 'before and after' photographs;
- Projects improving access to the landscape could include user surveys carried out by volunteers or members of lead organisations;
- Simple questionnaires can be completed by participants at training events;
- Cultural celebrations or community events could leave a permanent record in video or audio recording of participants, artworks etc.

4.4 Evaluation of your scheme's outcomes and legacy

The achievements of your scheme might include intangible as well as tangible changes, for example:

- New biological or historical survey data supports better heritage management in the longer term;
- Improved physical and virtual access to heritage can attract more and a greater diversity of visitors;

- Projects involving interpretation, education or training can lead to greater engagement with heritage by schools and colleges, a wider heritage skills base within the community and the creation of new volunteer groups;
- The identity and distinctiveness of the landscape and its natural and cultural heritage is better understood, appreciated, and valued by people;
- Organisations work together more effectively, third parties take on a legacy role, and new or strengthened governance arrangements are in place for the LP area;
- New heritage initiatives are stimulated, business models are developed and further funding or resources are secured; or
- The local economy is boosted and human and social capital is enhanced leading to improved social and economic well-being.

5 Evaluation techniques and tools

This section provides information on evaluation for projects and outcomes, on surveys and sampling, and the analysis and presentation of the information you collect. Refer to Section 7 for more sources of information and help.

5.1 Geology, wildlife, species and habitats

Conservation of natural heritage can include the protection or reintroduction of species, the eradication of alien species, the maintenance, restoration or enhancement of habitats such as grassland, ancient woodland, rivers and ponds. Habitat works may also involve the repair or restoration of boundary features such as fences, hedges and dry stone walls. All these can be included as output data and are categories in Worksheet 3: Biodiversity and landscape features in the Output Data collection spreadsheet.

LP schemes can use data collection as an opportunity to:

- Forge partnerships and seek advice from statutory country agencies such as Scottish Natural Heritage and Natural England;
- Work with local Wildlife Trusts and other bodies such as the RSPB or other species-focused voluntary bodies, who may provide a good source of expertise and possible hands-on assistance;
- Integrate with national recording and monitoring schemes (such as the Common Bird Census, Butterfly Census etc);
- Where appropriate, use techniques which align with nationally recognised methods such as the JNCC Common Standards Monitoring (CSM) or the BTO/RSPB Breeding Bird Survey (BBS);
- Involve amateurs – thereby adding participation, understanding and training to the benefits of wildlife conservation;
- Keep careful records of the methods used (so that they can be replicated) and of the results (to use as a baseline for subsequent surveys).

It is a condition of your HLF grant that if any of your projects contribute to UK, regional or local biodiversity targets, you must report all actions or monitoring/ evaluation data through the **Biodiversity Actions Reporting System (BARS)** <http://ukbars.defra.gov.uk> [Guidance on using BARS is available on](http://ukbars.defra.gov.uk/help) <http://ukbars.defra.gov.uk/help>

Any species observations must comply with the standards for data quality and accessibility as set out by the **National Biodiversity Network (NBN)** www.nbn.org.uk

Your data must be made publicly available using the **NBN Gateway** data.nbn.org.uk

There are several ways of achieving this. The preferred route is online recording through the **Biological Records Centre** (www.brc.ac.uk) using iRecord. Alternatively your data can be shared with your **local or regional environmental records centre** (www.alerc.org.uk) for onward transmission to the NBN Gateway. You can read about digital outputs in the LP application guidance at appendix 1.

5.2 Works to built and archaeological features

Projects involving physical heritage can include a variety of activities, including the recording/cataloging, archiving or storing, repair or restoration, reuse and interpretation of:

- Conservation areas, listed buildings, Scheduled Monuments as well as vernacular buildings such as village halls, commercial, domestic and residential buildings, and churches, chapels and other religious structures;
- Industrial maritime and transport features including those involved in communications, food processing, mining and extractive structures, bridge/viaduct, ships/boats and water supply/drainage features;
- Designed landscapes such as parks and gardens; and
- Museums, galleries, libraries, archives, paintings, and sound and film records.

Evaluation of works to built and archaeological heritage provides the opportunity to:

- Forge partnerships with statutory country agencies such as Cadw, English Heritage, the Environment Agency for Northern Ireland and Historic Scotland;
- Engage local authority specialists such as county archaeologists, archivists, museum curators and others;
- Involve local groups particularly where these may provide a source of expertise or voluntary input such as County garden trusts or local nature conservation groups;
- Maximise and collect evidence on the people benefits of works to the built and archaeological heritage;
- Add to local and national records.

5.3 Projects and outcomes involving people and communities

People and communities need to be at the heart of LP work. Many projects will focus directly on education or training, or more broadly on community participation, but capital works also provide the opportunity to engage people, especially in deliver, monitoring and evaluation.

Reporting the achievements of people-focused projects should distinguish between obvious outputs (e.g. km of footpath or of heritage trails created), their outcomes and then give deeper understanding of what people have gained from this. The number of events or of participants is a good output measure but a robust evaluation will ascertain how much people have gained from their involvement. Follow-up with trainees to see how many use their new skills, secure qualifications or jobs may be difficult during the LP scheme, but exit surveys to see what participants' aspirations or intentions are a form of evaluation and provides an avenue for later post-scheme appraisals.

Keeping records of community engagement and volunteering can be a challenge but it is very worthwhile. Consider:

- Keeping numerical records of numbers of people attending LP activities. If possible, record their age, sex, and other relevant information. You may be able to secure volunteers to carry out small sample surveys.
- Find out *why* people engage, what motivates them and what they think they have gained from a community event or volunteering experience.

- You could relate the information you collect to existing data on engagement. Natural England's Monitoring Engagement with the Natural Environment (MENE) project can provide a great deal of data covering English counties for example:
www.naturalengland.org.uk/ourwork/evidence/mene.aspx

5.4 Benefits to social and economic well-being

Assessing the social and economic benefits of LP work is one of the most challenging areas of evaluation. Some benefits can be measured directly, but the number of new businesses or full-time-equivalent jobs created or safeguarded through LP work (worksheet 11 of the Output Data Collection workbook) may only give a partial measure of the employment impact. Broader estimates of economic impact may be based on estimates of combined HLF and partnership 'spend' in an area using standard multipliers. Indirect measures may also be relevant, for example visitor data where this exists. However the best evidence may often be based on surveys, individual case studies and anecdotal evidence, for example asking local retailers or community representatives. There is advice on this approach in HLF's evaluation guidance which can be found on our website.

5.5 Surveys, questionnaires and interviews

Questionnaires or interviews are useful in collecting baseline data and assessing what you have achieved. Surveys require careful planning and sometimes specialist skills if they are to provide good data for evaluation. They can be designed and carried out by contractors, but are often just as effective if they are conducted by project participants and volunteers.

Surveys can be:

- Carried out across a range of potential beneficiaries of your LP scheme
- Directed at participants or potential participants in individual projects

They can be designed to target:

- The whole 'population' (e.g. every member of a community, all participants in a project), or
- A representative sample (selected at random or in some other way)

Surveys can be formal and informal:

- Formal surveys are carefully designed and based on a statistically significant sample of the target population. They will usually require external consultants and therefore cost more.
- Informal surveys are more practical. They may not be statistically robust but they can still yield useful information at little or no cost.

Surveys may be

- Conducted in person, which usually has a good response rate
- Self-completed by the respondent through paper or on-line questionnaires. The response rate here is usually lower but still provides useful information.

SurveyMonkey www.surveymonkey.com provides a relatively easy-to-use facility to design and conduct your own on-line questionnaire survey.

Almost all surveys involve some kind of bias. On-line surveys, for example, provide fast results they are also more difficult to control and may be favoured by certain groups of people. Remember that questionnaires do not always have to be detailed – ask for the information that's most important to you.

5.5.1 Group approaches

Group approaches can be useful in providing qualitative evidence of change. Their advantage is that they can be easily built into individual projects. Their disadvantage is that although the information they provide may be obvious to the participants, facilitator or both, it can be more difficult to measure and to communicate the results to others.

Speak to other LP teams who may have tried group evaluation to see what works best. You could ask someone who has run successful sessions elsewhere to lead an activity for you.

Below are some potentially useful techniques for group work:

5.5.2 Workshops

Workshops, either as one-off or a series of events, encourage group ownership of problem identification and solving. They enable discussion and analysis of issues and are an important form of direct participation. However they may not yield truly robust data for the purposes of LP evaluation. Useful advice on workshops can be found in the Forestry Commission's Evaluation toolbox www.forestry.gov.uk/toolbox and on the Evaluation Support Scotland webpages www.evaluationsupportscotland.org.uk

5.5.3 Focus groups

These are small representative groups of individuals brought together to discuss a particular topic under the guidance of a facilitator. Discussion is recorded and transcribed and the facilitator incorporates these into a report which is useful for evaluation. Further advice can be found in the Forestry Commission's Evaluation toolbox www.forestry.gov.uk/toolbox

5.5.4 Forums

Forums are groups of stakeholders meeting to discuss issues of common interest. They are good at fostering networking and can provide good long term evidence of change and benefit.

On-line discussion groups can also provide some insight into perceptions and opinions though if participants are self-selected they may not be representative. Helpful advice and guidance can be found on Partnerships Online www.partnerships.org.uk/guide/index.htm and in the Forestry Commission's Evaluation toolbox www.forestry.gov.uk/toolbox

5.5.5 Storyboard

A storyboard provides a framework for a stakeholder group to examine and communicate the main objectives, activities and outcomes of a scheme or project. It helps to identify the important questions or indicators that can demonstrate if, what and how change has occurred. There is a lot of advice on the Storyboard approach in HLF's generic evaluation guidance:

www.hlf.org.uk/HowToApply/goodpractice/Pages/Evaluation_guidance.aspx

5.5.6 Other techniques

There are a number of other group techniques which may be tried according to circumstances. These include:

- **Direct observation**
- **Citizens' jury**
- **Participatory appraisal**
- **Planning for Real**
- **Public hearings**
- **Public meetings**

Information on all the above can be found by typing in the appropriate term into the 'search' box in the Forestry Commission's Evaluation toolbox www.forestry.gov.uk/toolbox

5.6 Evaluation using media

A range of media techniques can be used in a variety of ways to capture before and after changes in the physical landscape, to provide a record of activities and to capture changing perceptions of the landscape. Using them for evaluation requires care, and they are not neutral records of reality. However they may be valuable techniques in evaluation, particularly for capturing the intangibles'.

5.6.1 Photographs

Digital photographs are an accessible tool and provide a valuable record of activities and events. A photo archive is a valuable source of evidence and can be set up with relatively little time and effort, adding depth to other evidence you collect. Photos should always be accompanied by a caption or reference.

5.6.2 Fixed point photography

Photographs taken from an identical point are an excellent way of recording change over time, particularly for projects involving landscape work, habitat improvement or archaeological restoration. For heathland restoration or woodland coppicing, for example, fixed point photography provides a cheap and simple alternative to costly ecological mapping to show the extent of scrub encroachment or the condition of the ground flora.

Even if you didn't take photographs at the beginning of a project you can still take photographs during and at the end to show what has been achieved. These records can then also be used five or ten years after the end of funding to show how the improvements resulting from HLF funding have endured.

5.6.3 Video

Video can record the complexity of activities and obviously includes dialogue. Its use in evaluation requires interpretation but it is particularly useful for capturing workshops providing it is done in a non-intrusive way. Useful advice is offered by Evaluation Support Scotland's website <http://www.evaluationsupportscotland.org.uk/>

5.6.4 Audio recording

Often the most valuable element in recording is what is said. Audio recording is a useful way to capture feedback from and to provide record for both individual interviews and group activities. Some useful advice is available on Evaluation Support Scotland's website <http://www.evaluationsupportscotland.org.uk/>

5.6.5 Paper media

Workshop posters, leaflets, and other material produced by the LP scheme and its participants can be used to illustrate evaluation reports.

5.6.6 Broadcast items and press reports

Media reports – whether radio or television reports or cuttings from local newspapers or magazines can be a good tool for evaluation. Not only are they a permanent record of local interest at the time but they can also be used to provide a record of changing perceptions.

5.6.7 Digital media

Evaluating a digital project is not that different from evaluating any other form of activity – you need to set measures and targets for your digital outputs and decide how to gather and record your achievements against them. Your targets and measures could be quantitative e.g. the number of downloads of a phone app, users of an online resource or contributors to a survey of habitats and species or qualitative e.g. positive comments or suggestions received through your online feedback form or online survey.

5.6.8 Your LP website

Digital returns can also contribute to assessing the work of your partnership overall. Your partnership website – or web pages on your lead organisation's site – can include a facility to record information about number of visits, how long users spend on your site, and which pages are most frequently viewed. Another simple measure is how many other websites are linking in to your website.

Google Analytics www.google.co.uk/analytics is one of a number of sources offering free tools for analysis of website use including html code for tracing the number of visits and how long users stay on which of your web pages. This can be used as a simple evaluation tool to gauge changes of interest in your partnership or in different aspects of its work.

5.6.9 Social media

If you are using social media sites, such as Facebook, you can capture data about followers and the number of 'likes' your site has. Other social media - such as Twitter – can also be used for monitoring and evaluation. All are subject to bias. Comments can be used to illustrate conclusions you may have drawn from other investigations but should not be the only source of evidence.

5.7 Sampling, analysing and presenting quantitative data

Not all quantitative data needs statistical analysis. It only becomes necessary:

- When your data is a sample of a wider population;
- When you need to compare two or more samples, such as before and after data, or if the values of a particular project or site are very different from the average of your landscape area as a whole
- When you think there may be an association between two variables (such as gender and different types of activity, or the kinds of species attracted to different types of habitat), when you think two variables might be connected or if you think your data may represent some kind of trend.

Statistical theory and techniques can be complicated, so if there is nobody statistically competent in the LP team find someone who is. In the meantime, the notes below will give you an idea of the issues involved.

5.7.1 A note on sampling

When surveying natural or built heritage or people decide on what size your sample will be. This is often the case for visitors and local residents where the populations could potentially be hundreds or thousands. By sampling you can keep the task manageable. If you take enough samples (e.g. question enough people) you can be fairly sure that the answers you get will be close to the answers you would have got if you had interviewed everyone.

The individual samples you take (the people you interview) should strictly be selected at random, though you might decide to set 'quotas' to make sure you get a good representation of people from different categories or social backgrounds. An example is giving a questionnaire to every fifth visitor exiting an event.

Partly because of the complexities of sampling, and partly because carrying out fieldwork, entering data and compiling charts and tables can be very time consuming. You could involve professional consultants or a market research company, and they will also analyse and present the results for you.

6 Planning, resourcing and reporting your evaluation

Evaluation is not something which can be left to the end of your scheme. It needs to be properly planned during your development phase, and should be a continuous process throughout delivery.

When you produce your final evaluation report, you are telling the story of your scheme – what went well, what went not so well, and why. Evaluation is about learning and accounting for what you have done, and your progress reports, including your final evaluation, should not be an end in itself. Not everything can work 100% and your evaluation will be more credible for pointing out shortcomings or mistakes. Effective reports throughout the scheme will help you to:

- Clarify what you are trying to achieve;
- Provide you with information on the progress and change the scheme has made;
- Help you to review and refine your goals as the project progresses;
- Communicate progress to LP scheme partners, other stakeholders and the wider community;
- Provide valuable evidence to demonstrate the wider impact of your scheme; and
- Provide a business case for continued investment and further funding after your HLF grant has ended.

6.1 Resourcing your evaluation

HLF guidance states that the costs of evaluation can be included in your budget. HLF's contribution is limited to 1% of project costs for grants of £2m or more, and up to 3% for grants below £2m.

6.2 Your final evaluation report

Your final evaluation and evaluation report for HLF is an opportunity to:

- Demonstrate to HLF that Lottery money has been well spent and secure payment of the final 10% of your grant;
- Prove to yourself and others, including others who contributed match funding, or gave their time and energy to the scheme, that this is the case; and
- Be clear about its lasting benefits so that partnership members and others will be motivated to continue the work, and indicate its weaknesses so that they – and perhaps other LP schemes – can avoid them.

We recommend you to start or commission your final report at least six months before your scheme ends. If your LCAP has been well produced, if its implementation has gone to plan, and if you have collected appropriate baseline and output data along the way, then most of the information and evidence that you need to produce your final evaluation report should be to hand.

6.3 Structure and content

Every LP scheme is different and there is no single right way to produce an evaluation report. At a minimum, your final evaluation report should include:

- A brief background to the LP area, the origins of the scheme, its aims, and details of the members of the Partnership and their roles;
- A summary of the individual projects and their objectives, including target audiences and key outputs;
- A list of the aggregate project outputs under your main LP scheme aims;
- A discussion of strengths and weaknesses - what went well and what didn't work so well;
- An examination of LP benefits in the form of its outcomes and the evidence for these; and
- The longer term legacy of your LP scheme and what arrangements you and your partners have made to secure this.

A list of possible sections for your report is below. Depending on the purposes, length and presentation of your report you may want a shorter 'stand-alone' summary for wider circulation.

Section	Notes
Table of Contents	Main sections with page numbers including a table of appendices, if included.
Foreword	Could be written by the Chair of your partnership board or by a well-known and respected local figure.
Executive summary	A brief background to the scheme and partnership, with an outline summary of projects, focusing on key achievements and benefits to heritage and people.
Introduction	The composition of your Landscape Partnership and its aims and objectives.
Achievements - what the Partnership has delivered	: Summary description of each project or group of projects with: <ul style="list-style-type: none"> • achieved outputs against original targets; • lead body and key partners; • project costs (inc. HLF grant), partner inputs, volunteer days, community engagement etc.

Section	Notes
<p>Outcomes and the legacy - what difference the scheme has made to your area</p>	<p>The outcomes of your LP scheme including key achievements, together with the arrangements in place to manage and maintain them, including:</p> <ul style="list-style-type: none"> • Outcomes for natural and built heritage; • Outcomes for people and communities; • Wider benefits and assessment in the context of LP work nationally; • Funding and leverage; and • Benefits of partnership working at a landscape scale. <p>You should also refer to your legacy planning which you will have submitted earlier to HLF.</p>
<p>Conclusions</p>	<ul style="list-style-type: none"> • What do your stakeholders think, and assessments from others; • Lessons learned relevant to other LP projects - what went well and what could have been done better; • Enduring legacy for the Landscape Partnership area; and • What next?
<p>Appendices</p>	<p>Could include:</p> <ul style="list-style-type: none"> • Summary of project activity and outputs over the life of your LP; • Extracts from previous years evaluation reports; and • Financial summary including HLF grant, match funding and leverage.

Your report is not just a document for HLF. It should be a public document and accessible on your partnership or lead partner’s web pages. It should be written with a wide audience in mind, including LP partners and beneficiaries, other organisations who might learn from your experience, and those who may help maintain your schemes benefits, or perhaps do something similar elsewhere.

It could include photographs of both people and landscape, include tables of outputs, personal statements, quotations from participants and beneficiaries, and examples of particular achievements. Remember that the report will be read by individuals who may not be familiar with your partnership area.

It should not be just be a promotional document. It needs to reflect on the less successful parts of the scheme as well as celebrate outstanding achievements. This will make it more credible and will help others elsewhere. Highlighting what you weren't able to do within the HLF timescale and funding may help in future grant applications.

6.4 The process of producing your evaluation report

The production of your final evaluation report is likely to include:

- Agreement amongst the Partnership Board on the brief, and whether the work is to be carried out in-house or contracted out;
- Assembly of relevant information. Much of this should be in your Output Data spreadsheets, your periodic reports to HLF and your monitor's reports. However you will need to think carefully and assemble evidence showing your LP's more enduring outcomes;
- Production of the first draft of the report; and
- Partnership meetings to discuss its contents and to 'sign off' the final version.

It will be helpful to get input from your HLF monitor and grant officer at an early stage; however the final report needs to be an independent evaluation of your work.

You will find it helpful to bring in external input for production of the final report. This helps to produce an objective view enabling things to be said both complimentary and critical which you might find hard to say yourselves, and makes your report more authoritative and convincing.

Make sure external consultants are well briefed, with a clear timetable, contents, consultation processes and your preferred format for the final product. You could invite interested applicants to submit preliminary proposals for how they would propose to carry out the work and what the final report will look like.

Most partnerships will have links with graphic designers who have already proved themselves in producing other materials and are familiar with aspects of the partnership's work. Agree at an early date the purposes and format of your report.

7 Further sources of help on evaluation

Below are links to further sources of evaluation help from HLF and other organisations.

7.1 HLF's 'Evaluation: Good-practice guidance'

www.hlf.org.uk/HowToApply/goodpractice/Pages/Evaluation_guidance.aspx

This guidance is aimed at Heritage Grants applicants. It contains advice on visitor surveys, questionnaires and volunteer records and advice on qualitative methods. There is material on participatory appraisal, online tools, written and telephone surveys, face-to-face questionnaires and interviews, focus groups, art work and video

7.2 Geology, species and habitats

The **Joint Nature Conservation Committee (JNCC)** is the coordinating body for the UK country nature conservation agencies. It is responsible for the Common Standards Monitoring (CSM) programme which aims to assess the species, habitats and geology principally of the UK's 6,000 protected areas. However the techniques involved are applicable in principle to the countryside as a whole.

jncc.defra.gov.uk

All country nature conservation agencies use CSM and their local offices may be able to provide further advice on this and on tailored approaches for particular habitats and species, as follows:

Wales: **Natural Resources Wales**

<http://naturalresourceswales.gov.uk>

Northern Ireland: **Environment Agency for NI**

www.doeni.gov.uk/niea

England: **Natural England**.

A major focus is now the new Nature Improvement Areas established following the Natural Environment White Paper.

www.naturalengland.org.uk

Scotland: **Scottish Natural Heritage (SNH)**

www.snh.gov.uk

MAGIC (multi-agency geographic information for the countryside)

<http://magic.defra.gov.uk>

An on-line interactive portal to spatial information and datasets ranging from administrative areas and access through rural designations such as SSSI boundaries to habitat inventories such as ancient woodland.

Considerable expertise in monitoring and evaluation of species and habitats exists within various voluntary bodies.

There are 47 **Wildlife Trusts** covering the whole of the UK (all English and Welsh counties, with a single Trust for Northern Ireland and for Scotland) with a membership of 800,000.

www.wildlifetrusts.org.

The **Royal Society for the Protection of Birds** (RSPB) and the **British Trust for Ornithology** (BTO) run the national **Breeding Bird Survey** (BBS). Although primarily a programme aimed at monitoring national and local trends in bird populations, the BBS provides a good tool for monitoring and evaluation of the consequences of habitat work.

www.bto.org.

Other bodies focusing on taxonomic groups range from the **Bat Conservation Trust** to the **British Lichen Society**. Most will be able to offer advice and possibly practical help.

www.bats.org.uk

www.britishlichensociety.org.uk.

Whilst CSM or other rapid evaluation approaches may be the most appropriate for semi-natural sites, other standards are more appropriate for designed or recreational areas. The national **Green Flag Award Scheme** manual includes criteria which can be used for evaluating the post-scheme quality related to parks and other public open spaces.

greenflag.keepbritaintidy.org

7.3 Archaeological and built heritage

There is no equivalent to the JNCC coordinating 'built heritage' conservation in the UK and no standard UK wide approaches to monitoring and evaluation. However the country agencies – Cadw, English Heritage and Historic Scotland and the Northern Ireland Environment Agency (Built Heritage Directorate) are all able to provide some advice.

Wales: **Cadw**

cadw.wales.gov.uk

England: **English Heritage**

www.english-heritage.org.uk

Northern Ireland: **Environment Agency for NI**

www.doeni.gov.uk/niea

Scotland: **Historic Scotland**

www.historic-scotland.gov.uk

Significant works to buildings are likely to involve architects or structural engineers who can advise on long-term monitoring.

If you do not already have competent archaeological advice your local government archaeologist may be able to help.

7.4 People and communities

Office of National Statistics

www.statistics.gov.uk

Provides socioeconomic data, some of which is cut to boundaries relevant to LP work. The categories we use to collect your output data correspond to those of ONS wherever possible.

Community Evaluation Northern Ireland (CENI)

www.ceni.org

A charity set up to support voluntary and community groups to monitor and evaluate their work. Publications include 'Prove and Improve' notes on self-evaluation.

Charities Evaluation Services (CES)

www.ces-vol.org.uk

Their 'tools and resources' pages have information on planning for monitoring and evaluation, and outcomes and outcome indicators.

Evaluation Support Scotland (ESS)

www.evaluationsupportscotland.org.uk

ESS is funded by the Scottish Government to offer support to voluntary organisations and funders. They have support guides on developing and using indicators, designing interview surveys and questionnaires, analysing information, writing case studies and producing reports.

Forestry Commission Participation Toolbox

www.forestry.gov.uk/toolbox

The toolbox is designed to help woodland managers engage with and involve the public. A series of downloadable one-page 'toolsheets' covers techniques such as citizens' juries, questionnaires, internet surveys, participatory appraisal, telephone surveys, and workshops.

Inspiring Learning For All

www.inspiringlearningforall.gov.uk

This is a 'self-help improvement framework' for museums, libraries and archives, and includes useful advice on how to measure learning outcomes and wider social benefits, including a 'question bank' to create and customise your own surveys.

Partnerships Online

www.partnerships.org.uk

This guide was funded by the Joseph Rowntree Foundation and is for community activists and professionals seeking to get people involved in social, economic and environmental projects and programmes.

The **Prove It! Toolkit** (produced by the **New Economics Foundation**)

www.proveit.org.uk

This is aimed at helping project managers evaluate success by involving volunteers and project participants in 'telling their own story', 'looking beyond the easy-to-count' to the important changes that might be happening to beneficiaries and the communities in which they live.

The toolkit involves three steps - deciding what to measure with a [Storyboard](#), collecting information with a [Survey](#) and looking back on what actually happened with a [Project Reflection workshop](#). There are worksheets and instructions for participative evaluation exercises including a poster evaluation exercise, and there is advice on [evaluation planning](#) and [reporting](#).