Evaluation good practice guidance

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Evaluation is a crucial part of measuring the impact, benefits and legacy of National Lottery investment in the UK's heritage.

By reading this guidance you will understand why evaluation is important and the difference it can make for future heritage projects and investment. You'll also learn the key points to consider in planning and conducting your evaluation, plus links to further information.

What is evaluation?

It is a structured process to:

- understand how well a given area of work is doing
- learn what differences you're making through your work
- help inform decision-making

Evaluating a project can help you learn how well it has met its objectives, as well as how effective, efficient and sustainable it was.

Why does evaluation matter?

We want to fund projects that support our vision for heritage that is valued, cared for and sustained for everyone, now and in the future.

Making time to learn and improve as you go is good practice. There are lots of benefits to making it a regular part of your work.

Evaluation should be considered, budgeted for and built in from the beginning of your project. This way you can track what has been achieved and generate real-time insights throughout your delivery.

How can evaluation help you?

It enables you to:

- identify what's working well and things you'd like to do better
- share learning, practical tips and ideas with others
- demonstrate the difference your work makes to funders, decision-makers and other stakeholders

How does evaluation help us?

Looking across evaluation learning from individual projects helps us to understand:

- if our strategy is heading in the right direction
- if our programmes and investment principles are achieving their objectives
- how to improve our approach to funding
- the experiences and needs of organisations caring for and exploring heritage
- the individual and cumulative impact and legacy of our funding

How to evaluate your project

Questions to ask yourself when setting out:

- **What is the purpose of your evaluation?** What do you want to achieve with your evaluation? For example – to improve what you do, to show the difference you make or to inform and influence. It's likely you'll have a few different purposes, so make sure you identify what the priorities are.
- **Who is the main audience?** Lots of different people might use the evidence that you generate. Deciding who the main audience is will help shape your approach to evaluation.
- **What are the key questions to answer?** Think about what you want to know or learn from the evaluation. This is likely to be a small number of overarching questions that guide your research.

Principles for good evaluation

Start early. Think about evaluation when you are designing a project or as early as possible to build learning in from the outset.

Set out the links between the following points, which can form the basis of an evaluation framework or theory of change**:**

- what your project will deliver (**activities**)
- what this will do (**outputs** – the tangible results of project activities, such as visitor numbers)
- the benefits you hope this will achieve(**outcomes** – the changes or benefits that come from your outputs, such as improved knowledge)

Balance your evaluation needs with the capacity and resource available. There are different ways to generate evidence – it's all about what fits best for your purpose, audience and questions. You can do it yourself, you can pay a consultant or a mix of both. This will depend on your capacity, experience, budget and resources, the type of evaluation you want to do, as well as the size of your project – it should be proportionate. Whatever approach you take, make sure you adequately resource your evaluation in terms of both internal and external time and costs.

Gather data and evidence that matters. There are lots of things you could measure, but you can't measure everything. Work out what's important to you and your stakeholders. Try to build on existing practice and learning where appropriate. Consider a wide range of evidence – qualitative and quantitative – and what best fits your purpose. If you can, gather some baseline data at the beginning so you can track what you achieve over time.

Analyse your data to provide evidence on outcomes. Think about how you will analyse your data and if you have that expertise or need support from others. A good evaluation report presents data and makes sense (analyses) of what the findings mean – this is telling a story from the data. For example, interpreting what your data says about project activity and engagement, areas of strength or areas for improvement.

Try to make your evaluation objective and free from bias. You may want to show your project's work in a good light, but evaluation is about learning. This means highlighting what has not worked or been achieved, as well as the successes. Sometimes we unintentionally skew what findings mean by ignoring information that doesn't fit with our experience or assumptions or believing a point is more important than others because we agree with it. Bias can also occur unintentionally when evaluation is carried out by those closest to the project. To mitigate this, involve people with a range of different views in making sense of findings and deciding what they mean.

Present and share the learning. Distil the evaluation work into a self-contained report, with an overview of the purpose, approach and learning on each outcome and conclusions or recommendations. The evaluation report should include project insights, areas for improvement and learning for the future. Clear conclusions and recommendations will make the learning more accessible and easier to apply to future work.

Useful links

Getting started with evaluation:

- explore NCVO's evaluation resources
- join Better Evaluation, a community knowledge platform
- learn about NPC's Inspiring Impact programme

Theory of change:

- read NCVO's theory of change guide
- explore NPC's theory of change in ten steps