Evaluation

Good-practice guidance

August 2017

Heritage Lottery Fund – Introductory Evaluation Guidance

Contents

1. Why read this document?

This guidance provides some background information on carrying out evaluation, along with advice and ideas on producing your evaluation report. You should note that some sections have been developed mainly for Heritage Grants applicants and projects, such as section 8. However, applicants under all our grant programmes will also find this guidance useful, as it provides advice on how you could evaluate against the outcomes in our framework which are relevant to all targeted programmes. As the emphasis on managing for results increases, the demand for rigorous and evidence-based evaluations is rising. It is in your interest to produce as high a quality self-evaluation as possible as this will enable you to secure future funding and to demonstrate and publicise your project's impact.

2. What is evaluation?

Evaluation is a systematic and objective assessment of an on-going or completed project, programme or policy, its design, implementation and results. The aim is to determine the relevance and fulfilment of objectives, efficiency, effectiveness, impact and sustainability. Evaluation is also the process of measuring the activities in a project and reporting on the outputs and the final outcomes i.e. the impacts that the project has caused. Most projects or programmes contain objectives and indicators that seek to define the changes they are trying to bring about. In order to assess progress it is necessary to understand the original situation, which means collecting and recording information on these objectives and/or indicators at the start of the project or programme. This is called the baseline. In theory, the same data is then collected later in the project or programme, and change is compared. Without a baseline it is much harder to evaluate progress, because changes cannot easily be compared with the original situation.

Evaluation should be built into your project from the beginning. It has two purposes: proving what has been achieved, and improving as part of on-going project activity. You need to create an evaluation plan at the start of your project. This will be an outline of how you are going to go about setting baselines, collecting data to measure, analyse and understand what you are doing and ultimately to provide evidence about the impact your project has had. On-going evaluation will help ensure your project delivers the outcomes that it set out to do from the beginning.

3. Why does evaluation matter to the Heritage Lottery Fund?

The Heritage Lottery Fund (HLF) aims to fund projects that make a difference for heritage, people and their communities. Asking our projects to carry out self-evaluation supports us to demonstrate that difference and to know whether a project has spent its money appropriately and desired outcomes have been achieved. We report on these achievements through continuous programme evaluation, which often relies on information from project level self-evaluations. Programme evaluation helps HLF learn through:

- Monitoring – letting us know if our strategy is heading in the right direction?
- Evidencing – telling us whether our programmes are achieving their objectives?
- Validating – informing us whether we are making the right funding decisions?
- Improving – showing us if we can improve if we change something?
- Researching – adding to our body of knowledge.
- Advocating – providing the HLF board with evidence to support HLF's vision.

4. What are the core tools of good evaluation?

4.1 Logic model

It is really helpful to use a logic model when planning your evaluation. This is a succinct way of setting out the activities, resources and planned outputs and outcomes (i.e. impacts) of a project. Below is an example of how to set out your logic model:

<table>
<tr><th rowspan="2">1. Inputs</th><th colspan="2">2. Outputs</th><th colspan="3">3. Outcomes – IMPACT</th></tr>
<tr><td>Activities</td><td>Participation</td><th>Short</th><th>Medium</th><th>Long</th></tr>
<tr><td>What resources are going in …

Time
Money
In-kind support</td><td colspan="2">What activities are undertaken and what level of participation/engagement is achieved …

No. of events
No. of attendees</td><td colspan="3">These are the things that result from the participation or engagement …

In the short term they are likely to mean:
Awareness, Learning, Knowledge, Skills, Motivations

In the medium term they are likely to mean:
Actions, Behaviours, Practice, Decisions, Policies

In the long term they are likely to contribute to larger scale changes: at an economic, social, environmental level etc.</td></tr>
<tr><td colspan="3">4. Assumptions
The underlying assumption behind the project / activity</td><td colspan="3">5. External Factors
Factors that are likely to influence / or hold back change.</td></tr>
</table>

How the logic model works:
1. **Inputs** are the resources that are used to make the project happen e.g. time and money.
2. and 3. Outputs and Outcomes. It is easy to get confused between **outputs** and **outcomes**. One of the most straightforward ways to think about this is by using a capital project example. For example, if you are refurbishing a park with new lighting, one of the main outputs will be the new lampposts but the outcome is the better lit park which leads to other outcomes such as an increased sense of safety. Evaluation always needs to look beyond the outputs to what has been achieved as a result, i.e. the outcomes.
3. The **outcomes** of a project are likely to be wide-ranging. Some outcomes might be achieved in the shorter term and others in the longer term. The logic model above suggests some outcomes that may result sooner than others. Your logic model should help you set out what outcomes can be expected in the immediate aftermath of your project activity as well as the outcomes which are likely over a longer period of activity.
4. **Assumptions** are the underlying ‘theory’ behind the project i.e. how the project activities will create the intended outcomes. This is important as it is about understanding how the particular outputs lead to longer-term outcomes.
5. **External factors** are the elements that will influence what is trying to be achieved, either positively or negatively. The most sophisticated evaluations consider the extent to which the activity that they have undertaken are the key contributing factor to impact, or whether other elements have played a role.

4.2 Tools to gather data

When you have created a robust logic model for your project, you then need to plan what data will be collected, how it will be collected and when it will be collected to track the progress of the project's outputs and intended outcomes.

Collecting output and outcome data is in part about keeping a good record of the activities that are being undertaken, whom those activities reach and who gets involved with them. It will also involve 'talking with' the people that the project is trying to influence and seeking to understand what is happening. This is when well-designed research tools such as surveys, interviews and workshops can be used to gather material for analysis. You need to think through the following kinds of questions when designing your evaluation methods. It is important that you build in sufficient time and expertise to support a robust evaluation:

- What types of data are required?
- What is already being collected / available?
- What additional data needs to be collected?
- If the evaluation is assessing impact, at what point in time should the impact be measured?
- Who will be responsible for data collection and what processes need to be set up?
- What research methods will be used?
- How much time will need to be spent on evaluation?
- Ask yourself - Will we use an external supplier or do we feel we have the skills and time to conduct the evaluation ourselves?
- Is the scale of the evaluation activity proportionate to the activity that is being undertaken?
- What will we do with the results?

Nearly all projects need to count the numbers and type (e.g. diversity) of people who have attended or engaged in an activity over the course of the project. Ideally you will also include relevant **baseline** data so that it is possible to see what exactly has changed as a result of your project activity in terms of numbers but also often in terms of demographics (i.e. what are the usual visitor/participant numbers, and how has the enhanced activity increased those.) This means that there has to be some sort of survey work undertaken, either face to face or self-completion based with visitors/those who have been engaged.

Choosing the right research method

Choosing the most appropriate research method is a trade-off around a number of factors for example:

- How much time /money do we have to collect the data (online surveys can save time when compared to a hard copy approach)?
- In which format are people most likely to readily give us the data (e.g. will they be honest if in a large group / or if talking to staff)?
- Are there clever ways we can build in data collection to the experience (e.g. a quick survey as part of ticketing or as part of a particular experience of the project e.g. an exhibition etc.)?
- Do we have enough of a sense of what respondents are likely to say to develop good quantitative questions or do we need to do qualitative research first so we have more understanding of the themes?
- Will participants be able to participate fully in a written exercise or do we need to be aware of literacy or language issues?

The table below highlights some ways to approach data collection and points out some things to consider.

Aim	**Data sources**	**NB.**
Counting volume of engagement	- Visitor numbers through ticketing system - Manual count - Self completion survey (on-site or sent digitally afterwards) - Face to face survey (on-site)	If undertaking a manual count, this has to be undertaken over regular intervals and if in a particularly busy period (i.e. bank holiday) this should be taken into account
Understanding who has engaged – Age, Gender, Ethnicity, Socio-Economic Background, Disability etc.	- Self completion survey (on-site or sent digitally afterwards) - Face to face survey (on-site)	Self-completion surveys can have very low response rates, and can also be biased towards those most likely to complete the survey. The mode of delivery of the survey may also create or decrease engagement from certain groups e.g. if the survey is delivered through an i-pad on site, people who are less technologically aware/interested may be less likely to take part. Beware also of extrapolating too much from small numbers. Ideally you want survey returns from more than 100 people.
Understanding why they engaged and what they learnt	- Self completion survey (on-site or sent digitally afterwards) - Face to face survey (on-site) - Interviews / Focus Groups (on site, afterwards by telephone or in person)	It is important to use qualitative research (that is more in-depth and detailed interviews/discussions) when trying to understand behaviours, at least initially. This can be followed up with quantitative questioning.
Gathering feedback on digital resources	- Page Views / Downloads - Google Analytics - Facebook Likes - Sentiment analysis of twitter etc. - Self completion survey (on-site or sent digitally afterwards) - Face to face survey (on-site) - Interviews / Focus Groups (on site, afterwards by telephone or in person)	Setting baseline data is important to see what any increase has been, especially if you are updating a website as part of creating your project.
Gathering data / feedback from board, staff or volunteers	- Self completion survey (on-site or sent digitally afterwards) - Face to face survey (on-site) - Interviews / Focus Groups (on site, afterwards by telephone or in person)	As 'captive' audiences these groups are generally easier to get engagement from, and are too often overlooked as an important source of information around how a project has gone and what it has meant to the organisation, staff and volunteers. Again if you want to track changes in the views of staff or volunteers over time you need to collect data from them right at the start of the project. However this data should never be presented as an alternative to consulting with actual recipients of project activity.

Aim	Data sources	NB.
Gathering data / feedback from partners	- Self completion survey (on-site or sent digitally afterwards) - Face to face survey (on-site) - Interviews / Focus Groups (on site, afterwards by telephone or in person)	Again this data should never be presented as an alternative to consulting with actual recipients of project activity.

5. What are Heritage Lottery Fund's basic principles of a good evaluation report?

Heritage Lottery Fund have set out six principles for good evaluation, below we discuss each of these in turn.

a. The evaluation provides a logical framework setting out linkages between activities, expected outputs and outcomes for all elements of the project

Your report should highlight the logical approach that you have taken to your evaluation. It should detail your logic model and associated measurement plan.

b. Appropriate and methodical ways of asking are used which provide robust evidence including coverage of well-being as well as demographic, economic, social capital and quality of conservation issues where appropriate

Evaluations should include detailed summaries of the research methods used to collect data – this is important as it demonstrates the efforts undertaken to collect as much robust information as possible, and not rely on anecdote. It means that you provide detailed information in relation to the numbers of people that have engaged with / or you tried to engage with your evaluation activity. An example of a good treatment of this is provided below, it comes from project that produced a robust evaluation report. The authors gathered data from a wide range of sources and used a number of different methods to achieve robust numbers with their quantitative activities as well as using qualitative techniques appropriately:

> ***Summary of research methods***
> *We have taken a mixed method approach to data collection in this study. The different data sources referred to in this report are outlined below:*
> - ***Web survey****: Pop-up survey hosted on the xxx site over two waves (wave 1: Sept. 2015, wave 2: Nov. 2016), with a mini tracker survey in between. Total sample achieved: 6,327.*
> - ***Web user depth interviews****: Depth interviews with frequent and infrequent website users. Sample: 10.*
> - ***Stakeholder interviews****: Depth interviews with stakeholders from xx, xx and xx. Sample: 10.*
> - ***Exhibition survey****: Interviewer led-surveys that took place at xx, xx and xx. Sample: 331.*
> - ***Community participant focus groups****: Focus groups with community project participants in xx, xx and xx. Sample: c.21 individuals over three groups.*
> - ***Community facilitator depth interviews****: In-depth qualitative feedback from community project facilitators. Sample: 7 depth interviews.*
> - ***Partner organisation internal data****: Internal evaluation data from project partners.*
> - ***Project website:*** *Google Analytics data*

c. Data is subject to robust analysis to provide evidence on outcomes

Evaluations should be transparent about the methodologies used in compiling and analysing evidence. For example, when survey evidence is cited, sample sizes should be stated and any statistical tests used and specified. Reports should also readily point out areas where they are fully aware that the data collected is limited i.e. as their survey achieved a small response rate or the group that completed the survey only represent some of the groups that have engaged with the project.

Further to this, the report needs to contain analysis of the data, not just present the data. The report needs to have gone to some effort to interpret what the data means, what it says

about the project activity and engagement with it, does it highlight areas of particular strength / areas of improvement etc.
Finally the use of baseline data and comparison datasets to it, indicates a clear understanding of the purpose of the evaluation activity in comparing what has been achieved over time.

Some examples of good practice showing careful consideration of the quantity and quality of sources of evidence, and of transparency in reporting on them, are highlighted below:

> *"A survey was sent out to the cohort of volunteers in the database. (The database included 642 volunteer email addresses, of which 44 were no longer active, total active emails = 598). A benchmark for good engagement from an email survey is a 10% response rate, and the volunteer survey received an actual response rate of 17% (101 survey submissions)."*
>
> *"It is important to bear in mind the limitations of Google Analytics data when looking at the size of a web audience, for example, visitors are calculated through IP addresses so if a computer has multiple users accessing a site this will only register as one user.....there are also drawbacks to using pop-up web surveys, in that they are unavoidably open to self-selection....The limitations of both datasets have been considered when drawing conclusions throughout this study."*
>
> *"With a site of this nature, it is difficult to establish an entirely accurate profile of visitors. The table provides a representational overview based on data from (271) visitor questionnaires. This baseline of data can be used as a starting point for monitoring visitors and the impact of future outreach and community work."*

d. The evaluation is objective and free from bias
There is perhaps an inherent tension in self-evaluations - there is often a desire by projects to show their work in the best light, but evaluation as a discipline is about both proving and improving, which means highlighting what has not quite worked or impact that has not been achieved yet or was unrealistic to expect in the first place. It is for these reasons that evaluations need to be an objective review of what has been undertaken, not simply an opportunity to highlight all that has gone well. This also includes efforts to ensure that the evaluation itself is objective and that efforts have been made to challenge and scrutinise activity. For example, a project officer is often not the best person to gather data as they are fully immersed in the project and unlikely to be as objective as someone who is not so heavily involved with the project.

Bias can be unintentionally built into the project when evaluation is undertaken by those closest to the project itself. So it is important to consider if your approach is building in any bias and if so try to address it. One way to move away from bias is to use external referenced standards. For example, progress towards an external environmental standard is a helpful way to validate activity.

e. The results are clearly and sufficiently presented
This is a basic criterion for any report on the gathering and analysis of project evidence. A report should be reasonably self-contained, including a brief account of the project and its inception and, its logic model, followed by distinct chapters for each of its objectives with the evidence used in reaching conclusions on each. Sometimes reports are muddled, over complicated and lack analysis. Careful planning in how to set them out, and when and how to use data, is an important consideration.

An example of good practice is in an extract set out below. It is taken from an excellent evaluation report. This was a particularly well-structured report, which was supported by extensive appendices. Each of the ten project activity objectives had their own dedicated chapter. Each of these chapters had sub-sections titled: 'What you wanted to happen?' which described the activity aims and intentions; 'What actually happened?' which was a series of titled sections for each of the activities within that section describing what actually took place. This example also highlights well the usefulness of data collected over time.

What do you think worked well and why?

> Overall, the new events programme has been successful and played a crucial part in increasing visitor numbers to Wrest Park. The table below shows that in 2011/12 visitors to the site had doubled from the previous year. Although we have not come to the end of the financial year for 2012/13 yet – we expect it to be at a similar level to 2011/12 and a contributing factor would be the extremely wet weather conditions of 2012.

Year	**2008/09**	**2009/10**	**2010/11**	**2011/12**	**2012/13**
Total paying site visitors	15,014	26,797	26,308	45,852	31,120
Total non-paying site visitors	13,741	15,349	14,033	52,155	58,275
Total	28,755	42,146	40,341	98,006	89,395

> We feel that the addition of a varied family events programme has worked very well and already helped to widen our audience, specifically, the changes made to our St. Georges Day Festival has helped encourage visits from BME audiences. Surveys carried out during the 2012 event tell us that satisfaction levels had increased with 91% of people rating their visit as 'very good' compared with 86% in 2011 and 71% in 2010. See Appendix 4 for St. George's Day event surveys.

What didn't work and why?

> We felt that the outdoor theatre events did not work as well as we had expected them to. During consultation, this had been something various user groups had asked for but in reality they were not well attended – this could be down to the weather – or the fact that outdoor theatre is already well established at our nearby competitors, Woburn and Shuttleworth. In 2013 Wrest will host one theatre event in June and again evaluate its success. It will also have a music event each Sunday afternoon throughout July, which will aim to increase repeat visitors to the site and will be an additional event which is covered by the entrance fee of the visitor.

f: The conclusions and recommendations are sufficiently clear to enable stakeholders to identify and apply any lessons learned.

As we have already said evaluations are about both proving and improving so it important that projects are conscious of learning lessons along the way. Evaluation reports need to be able to clearly offer project insights, highlighting areas for improvement and learning for the future. It should be obvious in reporting that the evaluation approach has offered projects an opportunity to learn and reflect and that stakeholders have also been involved with that reflective exercise.

Examples of good practice in covering this criterion in self-evaluations are:

> *"The only aspect not demonstrating significant progress is increasing visitor numbers to the railway on the non-steam operating days. It had been hoped that Train Story would act as an additional reason to make reduced price visits. However visitor response makes it clear that people, especially those on holiday, want to see and pay for the complete rail experience, and are not driven by an exhibition led visit. This will have learning impacts on operational and marketing procedures for the next year."*
>
> *"It is essential that the Project Officer is thoroughly self-motivated and able to request and receive further assistance when working outside their comfort zone. This can be difficult for the organisation to achieve or resolve and can lead to under achievement. The Trust needs to consider how it can ensure that such difficulties are resolved in future projects, through improved approach to performance management."*

No.	Aspect of evaluation	Principles	What you should do	What you should not do
1.	Telling the project story	The evaluation provides a **logical framework** setting out linkages between activities, expected outputs and outcomes for all elements of the project	- Use a logic model approach to set out your project activity, what it hoped to achieve and then what it actually achieved - Make clear how the different output activities contribute to shorter and longer term impacts - State how other contextual factors may contribute to longer term outcomes alongside your activity	- Assume that outcomes have been achieved just because outputs have been delivered - Provide only a list of the activities undertaken
2.	Counting, involving, choosing indicators that matter	**Appropriate and methodical** ways of asking were used which provide **robust evidence** including coverage of well-being as well as demographic, economic, social capital and quality of conservation issues where appropriate	- Set out the ways in which the project sought to collect data from those it engaged with - Highlight why you chose particular evaluation methods - Articulate the complexity of achieving longer term impact goals, but highlight progress towards them - Use a mix of qualitative and quantitative research approaches, across a wide range of stakeholder groups	- Rely on anecdotal feedback that has been sent to you by individual visitors - Cast around for feedback from anyone who will give it to you - Present bits and pieces of data from sources like Trip Advisor in isolation - Rely on only one source of data, research only the views of one group
3.	Beyond counting	Data was subject to **robust analysis** to provide evidence on outcomes	- Undertake a baseline study - Critique the robustness of your data and highlight any limitations - Comment on sample sizes achieved - Analyse the data, highlight trends and patterns - Combine qualitative and quantitative data in explaining impact	- Present individual questionnaires - Present data at face value
4.	Avoiding bias	The evaluation is **objective** and free from bias	- Explain the lengths that you have gone to, to create engagement with your evaluation process - Demonstrate how you have tried to avoid bias in your approach, your questioning and your analysis - Highlight were you work has been subject to external scrutiny	- Write that everything has been positive without any independent information / evidence to back it up
5.	Structuring the process of understanding	The results are **clearly and sufficiently presented**	- Use tables, charts and graphs to help present key points - Support conclusions with data	- Present all the tables and graphs possible

No.	Aspect of evaluation	Principles	What you should do	What you should not do
6.	Improve not just prove	The conclusions and recommendations are sufficiently clear to enable stakeholders to identify and **apply any lessons learned**	- Make overt efforts to learn from the elements that have not worked so well and highlight the clear area of learning - Engage stakeholders in highlighting areas of learning	- Suggest that everything that could have been achieved was achieved, and that there was nothing to learn

6. What are Heritage Lottery Fund's outcomes?

Heritage Lottery Fund considers outcomes in three key areas: Outcomes for heritage / Outcomes for people / Outcomes for communities. Your application will have addressed at least one, if not more than one of these areas. The table below seeks to provide some guidance on the sorts of activities that you are likely to be undertaking and as a result the type of thing you could be measuring to show short to longer-term impact.

Outcomes for Heritage	**Example heritage activities being undertaken that influence all the outcomes**	**Example ways to measure these elements …**
Heritage will be better managed. *There will be clear improvements in the way that you manage heritage.*	- Implementation of new plans for management and maintenance - Securing additional staff, Trustees or other resources - More effective use of existing resources	- Changed financial position - Now achieving national or sector quality standards - Building being accessed and used by new groups
Heritage will be in better condition. *There will be improvements to the physical state of your heritage.*	- Repair, renovation or work to prevent further deterioration - New work e.g. increasing the size of an existing habitat to benefit priority species, or constructing a new building to protect historic ruins, archaeology or vehicles	- Achievement / journey towards professional / heritage specialist standards
Heritage will be better interpreted and explained. *There will be clearer explanations and/or new or improved ways to help people make sense of heritage.*	- New displays in a museum - A smartphone app - Talks or tours in a historic building - An accessible guide to a historic house - Online information about archives.	- Visitors and users will provide feedback on the new resources their ease of use, quality of information, impact on understanding e.g. learnt new facts or information, made sense of something new, gained a better understanding or deepened understanding, made links between areas that had not done previously
Heritage will be identified/recorded. *The heritage of a place, a person or a community will have been located/uncovered and/or there will be a record of*	- Identifying places or collections that are of relevance to a particular community and making information about them available	- Data about the volume of heritage that has been identified/recorded - Data about the gaps that this may have filled in an existing collection/data set

Outcomes for Heritage	**Example heritage activities being undertaken that influence all the outcomes**	**Example ways to measure these elements …**
heritage available to people now and in the future.	- Documenting languages or dialects - Recording people's memories as oral history Surveying species or habitats and making the survey data available -Cataloguing and digitising archives -Making a record of a building or archaeological site -Recording the customs or traditions of a place or community.	- Quality of that data and comment on that

Outcomes for People	**Example ways to measure these elements …**
People will have learnt about heritage.	- Visitor / user reaction to heritage topic - Visitors and users provide feedback on the new resources e.g. their ease of use, quality of information, impact on their understanding e.g. learnt new facts or information, made sense of something new, gained a better understanding or deepened understanding, made links between areas that had not done previously, created an interest in something new - Visitors and users will explain how they have used their new knowledge e.g. shared it with other people, used it in their professional or social life etc.
People will have developed skills.	- Staff, volunteers and participants will be able to demonstrate new competencies e.g. in new specific skills (e.g. project management, digital skills etc.), increased qualification levels etc.
People will have changed their attitudes and/or behaviour	- Changed views of visitors / users e.g. different perception of the importance of biodiversity or of the contribution made by young people in the community - Changed behaviours – E.g. others may have started doing conservation work joined the management group of your Friends organisation, decided on a career in heritage or got involved in other community projects.
People will have had an enjoyable experience	- Visitors, Users, Staff, Stakeholders – provide feedback on the time that they have had e.g. enjoyed the opportunities for social interaction, liked being part of a team achieving something, enjoyed learning about heritage, enjoyed celebrating their achievements. They can give feedback on expectations of experience, whether they will visit/participate again, whether they will recommend to others, if they are inspired
People will have volunteered time	- Feedback from volunteers might cover new skills, increased confidence, and a sense of purpose, enhanced wellbeing, and greater self-esteem, a feeling of making a contribution to heritage, community, and society.

Outcomes for communities	**Example ways to measure these elements …**
With our investment enviro	- Impact in terms of energy, water, visitor transport - Overall reduced carbon emissions

Outcomes for communities	**Example ways to measure these elements …**
nmental impacts will be reduced	- Changes in biodiversity - Environmental conditions improved for object care/storage
More people and a wider range of people will have engaged with heritage	- Change in audience profile over the course of the project– visitor background – i.e. people from a wider range of ages, ethnicities, social backgrounds, more disabled people; or groups of people who have never engaged with your heritage before.
Your local economy will be boosted	- Financial spend in the local economy - Increased footfall at heritage site and impact that it creates on locality
Local area/community will be a better place to live, work or visit	- Community feedback on impact of invigorated heritage site e.g. attracting more people, more pride in local area, more facilities for local people
Your organisation will be more resilient	- Change in management focus - Change in financial outlook, New financial resources - Change in resources & expertise - More local stakeholder involvement - More partnership working - New skills

7. What would a good evaluation report include and where can I find a good example of one?

A good evaluation report should include the elements outlined in the table below:

Report Section	**To include:**
Executive Summary	A robust overall summary of the project activities and impacts. It should be possible to read this and get a good grasp of what has been undertaken and what impact the overall project has had.
What we wanted to happen	This should highlight a brief background to the project, setting out why the project was conceived in the first place, what you planned to do and what difference the project was intended to make and why. If a logic model approach has been used, it should be detailed here.
What actually happened (This is likely to be the longest section of the report)	This section should detail what took place as part of the project under a coherent set of project activity headings. In addressing each of the areas of activity the difference made should be discussed and evidenced with clear reference to the robustness of the evaluation data collected. The difference being made should follow from the areas of outcome and impact highlighted by the project intent in the prior section. This section should also reflect on areas like project management, staffing, timetable, approach to ongoing evaluation etc.
Review	Overall what do you think worked well and why? Overall what didn't work well and why? How much of the difference would have happened anyway, even if no project had been undertaken at all? (In evaluation jargon this is known as 'deadweight')
Summary of Lesson learnt	What are the key things that the organisation has learnt? On reflection what would you do differently next time?

Examples of excellent evaluation reports submitted to the Heritage Lottery Fund can be found here:

Project title	Applicant	Heritage Area	Link
East Oxford: one history or many? A community archaeology project	University of Oxford, Department for Continuing Education	Archaeology	East Oxford: one history or many
Ranscombe Nature Reserve Community Heritage Project	Plantlife International	Environmental conservation	Ranscombe Nature Reserve Community Heritage Project
Royal Festival Hall Organ Project	Southbank Centre	Theatre/cinema renovation/conservation	Royal Festival Hall Organ Project

8. How much effort should be spent on evaluation?

Some guidance on the type of evaluation and the share of budget for evaluation that could be appropriate for smaller and larger projects is suggested below. This is designed to take account of the different scale of activities being undertaken and encourages commensurate levels and approaches to evaluation.

Under £250k projects

Spend on evaluation: Completed internally and 2-3% of total project costs
Acceptable Methodologies: Visitor books, Trip Advisor Feedback etc.
Outcomes: Focus on participation and engagement

£250k-£1m projects

Spend on evaluation: 3-7% of total project costs and consider use of external supplier
Use of baseline: Development of baselines & tracking against them
Acceptable Methodologies: Advanced qualitative and quantitative research
Outcomes: Focus on all levels of objectives

£1m+ projects

Spend on evaluation: up to10% of total project costs and use of external supplier
Use of baseline: Development of baselines & tracking against them
Acceptable Methodologies: Advanced qualitative and quantitative research
Outcomes: Focus on all levels of objectives

9. Where can I find out more about evaluation?

a. General sources on evaluation

Arts and Humanities Research Council (AHRC)
AHRC is a non-departmental public body sponsored by the Department for Business, Energy and Industrial Strategy (BEIS), along with the other UK Research Councils. They have produced several publications that may be of particular interest:
AHRC publications

Associations of Independent Museums (AIMS)
AIM is a membership organisation who support and champion independent museums, galleries and heritage organisations in the UK – helping them to achieve their purposes and ensuring their needs are recognised and addressed by policy makers, funders and other organisations working in the sector. They have produced a couple of publications that may be of particular interest:
AIMS Economic Impact Toolkit
AIMS Advocacy Toolkit

Better Evaluation
An international collaboration to improve evaluation practice and theory by sharing and generating information about options (methods or processes) and approaches.

Evaluation Support Scotland
Evaluation Support Scotland (ESS) works with third sector organisations and funders so that they can measure and report on their impact. Their aim is to make evaluation valuable, relevant and proportionate. Their website gives access to evaluation tools and support.

NCVO Charities Evaluation Services
NCVO Charities Evaluation Services help voluntary organisations and their funders with practical impact measurement and evaluation by providing consultancy, training and information.

b. Specialist practitioner sources on evaluation

Magenta Book
Guidance on good practice in the evaluation of public expenditure programmes and other policy initiatives is issued by the Treasury in the form of the Magenta Book.

If you would like to contact Heritage Lottery Fund to find out more about how best to approach evaluation or if you think your project could be used as a case study of good practice then please contact: evaluation@hlf.org.uk