

Evaluation of HLF Skills for the Future Programme

A report to the Heritage Lottery Fund



Contents

	Executive summary	1
1.1	Achievements of the Skills for the Future grantees	2
1.2	Assessing the quality of the evaluation reports	3
1.3	Recommendations	5
2.0	Introduction	6
2.1	The programme	6
2.2	The projects	8
2.3	The research	8
2.3.1	Scope	8
2.3.2	The methodology.....	8
2.3.2.1	<i>Synthesis evaluation</i>	9
2.3.2.2	<i>Meta evaluation</i>	10
2.3.3	The report.....	11
3.0	Synthesis evaluation: Reviewing the achievements of Skills for the Future grantees	12
3.1	Introduction	12
3.2	Needs	12
3.2.1	Skills shortages	12
3.2.2	Lack of capacity to deliver training	14
3.2.3	Lack of diversity in the workforce	15
3.3	Inputs	16
3.4	Recruitment	18
3.5	Activities	19
3.6	Outputs	22
3.6.1	Trainees	22
3.6.2	Qualifications and accreditations.....	23
3.6.3	Recruitment processes.....	24
3.7	Outcomes	24
3.7.1	Outcomes for people	24
3.7.2	Outcomes for communities.....	27
3.8	Lessons learnt	28
4.0	Meta evaluation: Reviewing the quality of grantee evaluation reports	31

4.1	Planning	32
4.2	Design	34
4.3	Implementation	35
4.4	Analysis and reporting	38
4.4.1	Sharing evaluation findings	40
4.5	Summary	41
4.5.1	Factors influencing the quality of project evaluations	41
5.0	Conclusions	43
5.1	Achievements of Skills for the Future funded projects	43
5.2	Assessing the quality of the evaluation reports	45
5.3	Recommendations	46
	Annex Two : Online questionnaire for survey of grantee organisations	2
	Annex Three: Evaluation Frameworks	7

Executive summary

The Heritage Lottery Fund (HLF) launched the Skills for the Future Programme in 2009 as a strategic response to the impact of the recession, aiming to strengthen the heritage sector for recovery by supporting the creation and delivery of work-based training opportunities. The programme aims to:

- fund high quality work-based training opportunities to equip people with the skills to pursue a career in heritage;
- meet identified skills shortages and gaps in the heritage sector;
- enhance the capacity of the heritage sector to deliver sustainable training and share good practice; and,
- increase the diversity of the heritage workforce.

The programme has provided more than £43 million in grants since its launch (£22,730,100 to a first cohort of projects, and £20,372,200 to a second cohort funded in 2012). It has clear alignment with HLF's 2013 – 2018 Strategic Framework and the overarching objective to secure a lasting difference for heritage, people and communities.

Evaluation is a requirement for all projects that receive HLF funding and, as such, is an integral part of any programme, including Skills for the Future. HLF's standpoint on evaluation is that the process is vital and has benefits not only for the development of the project, but also for the further development of the grantee organisation, aiding the measurement of longer-term impacts post-project. Good evaluation can provide benefits for both HLF and the wider heritage sector by supporting the case for heritage in more general debates about, for example, community or economy. By telling us what a project has achieved and the challenges it faced it can also help inform future funding plans by assisting HLF to understand more about the effectiveness of grants programmes, and what is best practice.

The aim of this research was to review and analyse the 48 evaluation reports completed to date by Skills for the Future grantees in order to:

- establish the extent to which the four programme aims have been achieved through a synthesis evaluation;
- conduct a meta evaluation, assessing the methodology, structure, content and quality of the evaluation reports; and
- provide recommendations to HLF (and future grantees) with a view to improving the quality and usefulness of project-level evaluations.

1.1 Achievements of the Skills for the Future grantees

Based on our review of the grantee evaluations the programme, and the individual projects it funded, has clearly been successful, particularly in terms of the outcomes for people sought by HLF. This corresponds to [previous evaluation](#) findings based on interviews with project managers, trainers and trainees. There is a high degree of satisfaction among trainees and the organisations involved in the delivery of the projects. This is demonstrated by the commitment of placement providers and also the trainees, most of whom either successfully completed their placement or left early to take up employment elsewhere in the heritage sector.

The consensus across all actors involved (grantee organisations, hosting partners, trainees and the subsequent employers of the trainees) is that the work-based approach is a very effective way to provide new entrants with the necessary skills to pursue a career in the heritage sector. The trainees did indeed develop useful practical skills through participating in the projects. Interestingly, this assertion seems to be valid across all skills levels, including with university graduates.

Taken together, the grantee evaluations demonstrate a very high rate of successful outcomes for participants. While not reported consistently across all projects, it seems to be the norm that more than half of the trainees subsequently found employment in the heritage sector. This would be considered a very high success rate for a programme aimed at inserting people into the labour market. Including employment in other sectors and further training or studies in the heritage sector, we estimate that the programme had a positive outcome for around 75% of the trainees who completed their placement.

We also found evidence of the wide range of skills developed by the participants, both heritage-related (conservation and public-facing skills) and generic (project management, interpersonal skills, etc.).

The evidence on progress towards the “workforce diversity” strand of the programme is insufficient to draw clear conclusions on whether this aim has been achieved. Data on this aspect of the programme is very limited in the evaluation reports, and there is insufficient consistency in the way evaluations report the stated objectives, the quantitative targets and the projects’ actual achievements with regard to diversity. In particular, there is only limited and anecdotal evidence of increased workforce diversity in terms of ethnicity – whereas projects with an aim to recruit younger trainees or disabled people seem to have fared better. Many projects seem to have made some effort to advertise the trainee positions to a more ethnically diverse audience, but there is little evidence in the evaluation reports of other proactive initiatives to improve workforce diversity; and, as a result, no real difference has been demonstrated. This is contrary to the findings of interim programme-level evaluations of Skills for the Future, which showed that, for example, some diversification of the workforce had been successfully achieved. The evaluation reports produced by the projects in the first cohort do not reflect the same narrative.

Awareness of the need for a more diverse workforce, however, was clearly acknowledged and recruitment processes have changed to a certain extent as a result of the programme. There

were several mentions of organisations shifting their recruitment criteria from a focus on “experience” to a greater emphasis on the “motivation” of the applicant. According to many accounts, the fact that Skills For The Future trainees were recruited mainly on motivation criteria and performed well in their placements, convinced the organisations that they should adopt this change for all of their entry-level recruitment.

The project evaluations are generally written in a celebratory tone, which may reflect grantee motivations for producing the reports – as an advocate for the work rather than an analytical review of the project. However, the reports do contain many lessons that are useful for future training providers. Among those lessons, many grantee organisations underestimated the effort and time required from the person managing the project, thinking existing staff would be able to take on this task in addition to their current work. This often resulted in delays in putting in place the support and infrastructure necessary for a successful placement. None however regretted their involvement in the programme.

Another strong lesson is the consensus around the fact that the best training programmes are developed jointly between the trainee and the host organisation and reviewed regularly during the placement period. Another key success factor also identified through the review is a strong match between the skills to be developed, the day-to-day work of the trainee, the host organisation’s specialism and the supervisor’s competence.

1.2 Assessing the quality of the evaluation reports

In terms of the quality of the evaluation reports completed, a key finding to emerge from the review is that there does not seem to be any correlation between the apparent quality of the project and the quality of the evaluation. A high-quality project delivered effectively and showing a number of positive sustained outcomes does not necessarily make for a solid evaluation, as the team has found throughout the review.

In our view, two points need to be emphasised in future guidance to grantees with regard to their project evaluation: first, a final evaluation is not a final activity report. Amongst the grantee cohort, there seems to be confusion and a lack of agreed principles as to what an evaluation report should look like, despite grantees having access to (and being encouraged to use) HLF evaluation guidance¹. For example, several projects submitted a collection of trainee case studies; while these are both relevant and interesting, alone they do not constitute an evaluation report. An evaluation is only useful insofar as it is robust and critical. Secondly, evaluating a project requires a different skillset to that required for project management or delivery.

Overall, the meta evaluation found that too few evaluations met the standard that would be expected for an evaluation of projects of that size (22 evaluation reports or 46% of the total were not considered satisfactory overall, and only 4 were rated as excellent). Table 1

¹ HLF updated its evaluation guidance in 2012. As a result, only three grantees included in this review (funded in the second cohort of projects) would have had access to this guidance at the time of *starting* their projects.

summarises the ratings achieved in the meta evaluation for the overall standard of the evaluation reports across the sample.

Table 1 Ratings achieved for the overall standard of the evaluation report

Rating	Number of reports
Excellent	4
Good	14
Satisfactory	9
Unsatisfactory	20
Missing ¹	1

Particular weaknesses in terms of methodology and reporting were observed with regards to the evaluation frameworks and methodologies used. Many project evaluations are not complete enough to be read as a standalone document. In particular:

- The description of the evaluation framework (which sets out the questions the evaluation is trying to answer) and methodology (which approaches are going to be used to answer the evaluation questions) was either missing or unsatisfactory in many cases.
- In some reports, the methodologies used were not robust and objective, giving too much weight to the project manager’s opinion, for example, whereas the best methodologies included consultations with external stakeholders and subsequent employers of the trainees.
- The completeness of the evaluation report was an issue in some cases. Notwithstanding the information reported to HLF through other channels before, during and after the project, the evaluation report should be understandable and sufficiently complete as a standalone document. This means offering a description of the project, its aims and targets and beneficiaries, its timeframe, and looking at the whole project cycle. Alongside this, relevant documents such as interim evaluations should be annexed if their findings are not fully incorporated into the final evaluation.
- Generally, the evaluation reports gave little consideration to the efficiency or value for money of the projects. In fact, only 18 of the 48 reports even mentioned the value of the grant received from HLF. One project evaluator attempted to carry out a Social Return on Investment analysis², but this was based on just one trainee and was methodologically weak.
- The amount of funding invested by the projects in conducting evaluations was generally very low. Across the cohort we reviewed, the average amount of funding requested to

¹ One report was categorised as ‘missing’ because the document produced by the grantee did not constitute an evaluation, and provided no information or analysis on the impacts of the project.
² Social Return on Investment (SROI) is a method for measuring and communicating a broad concept of value that incorporates social, environmental and economic impacts. More information can be found at [Social Impact Scotland, understanding your impacts](#)

spend on evaluation was 0.71% of the total grant. HLF's application guidance suggests that 1% - 5% would be appropriate. On average, those evaluations achieving an excellent rating in the review had larger budgets than those with unsatisfactory ratings.

- Generally, reports produced by external evaluators achieved higher ratings than those produced internally. This particularly related to factors around methodology design and implementation; external evaluations used more appropriate and wider sources of data, and had more robust methods. This demonstrates that evaluation is a discipline in its own right and requires a skill set that may not necessarily be held by internal project staff.

1.3 Recommendations

Based on this research, we recommend that HLF should provide grantees with harmonised reporting requirements, setting out in the programme evaluation guidance the quantitative data it wishes to see reported at project level (which could then be compiled across the programme). This could usefully include:

- number of applications for trainee positions received, number of positions available, and number of applicants selected;
- number of trainees hosted at the grantee organisation and at partner organisations;
- diversity data for both successful and unsuccessful applicants, as well as a description of any changes in recruitment processes;
- number of drop outs and replacements, and number of trainees who complete the training;
- number and details of accreditations received; detail of skills developed;
- employment outcomes;
- number of courses developed; hours of training received by trainers and supervisors.

We also recommend that grantees follow the checklist of evaluation good practice that was developed for this research project, and is available as an annex to the main report. This emphasises that project evaluation should be:

- critical and aimed at generating improvement;
- embedded in projects from the outset.

A focus on better data collection and evaluation will help achieve our further recommendation that more effort is required by heritage organisations in terms of achieving and reporting workforce diversity based on the evidence provided by this first cohort of Skills for the Future projects.

2.0 Introduction

Ecorys is pleased to submit the final report of the evaluation of Skills for the Future 2016. The Heritage Lottery Fund (HLF) commissioned Ecorys in October 2016 following an open procurement process. The project is the latest of a series of interim evaluations of the grant programme, with previous evaluations examining aspects of project delivery including capacity building and trainee experiences. HLF has also gathered a range of data about the programme in-house.

This is the first study, which examines evaluation outputs from the grantees participating and aims to update the HLF Board, grantees participating and other key stakeholders on the progress achieved by the programme to date.

2.1 The programme

HLF launched the Skills for the Future programme in 2009 as a strategic response to the impact of the recession, aiming to strengthen the sector for recovery by supporting the creation and delivery of work-based training opportunities. It recognised the need for targeted employer-led interventions to deliver what are sometimes niche skills needed by relatively small numbers of people in the heritage economy. The Skills for the Future programme built on the successful delivery of HLF's smaller-scale Training Bursaries programme (delivered since 2005) and both have sought to ensure the future sustainability of heritage through the supply of a skilled and more diverse workforce.

More than £43 million in grants has been awarded since the launch of the Skills for the Future programme. The majority of the budget in a Skills for the Future project is dedicated to bursaries for trainees and direct training costs.

Specifically, the programme aims to:

- fund high quality work-based training opportunities to equip people with the skills to pursue a career in heritage;
- meet identified skills shortages and gaps in the heritage sector;
- enhance the capacity of the heritage sector to deliver sustainable training and share good practice; and,
- increase the diversity of the heritage workforce.

The programme has clear links with HLF's 2013-2018 Strategic Framework and the overarching objective to secure a lasting difference for heritage, people and communities. The strategy also sets out HLF's ambition to be a responsive and collaborative funder and to deliver long-term benefits from Lottery players' money. Evaluating the Skills for the Future programme and the projects within it support this approach.

HLF has commissioned a number of studies of Skills for the Future to date, each with a different focus. These studies have provided evidence of the wide range of outcomes achieved for trainees, trainers, grantee organisations and the wider heritage sector. They also highlighted key challenges and areas for improvement.

The 2012 process evaluation found that development of programmes was time consuming, particularly for grantees with little experience. There was also varying knowledge of tax arrangements for traineeships, and a tension between lowering barriers to entry for applications and keeping the number of applications manageable. Success in meeting the diversity aim was mixed; better outcomes were achieved by organisations that worked with community organisations to advertise the roles and/or performed their own outreach work. Most projects did not set *specific* diversity targets for recruitment and very few restricted traineeships to target groups.

The programme-level interim evaluation in 2013 demonstrated that projects in cohort one had begun to deliver outcomes. All projects had recruited to placements, with an average of 14 per project, and most trainees had received accreditation. Furthermore, at this stage more than three quarters of trainees had already found employment. The programme also benefited the grantee organisations directly. Most developed a new training programme, a new model of training delivery and/or a new training partnership for the project. It was clear that Skills for the Future had developed capacity in the development and delivery of work-based training. Grantees also reported that the programme had filled skills shortages, developed new operational partnerships and achieved other organisational benefits such as extra capacity, new ideas and a more diverse workforce. In light of the ongoing effects of the financial downturn, however, there was little evidence that projects intended to continue to offer entry-level work-based training beyond the life of the programme.

In 2014, the focus turned to the trainee survey data. The evidence was clear that trainees had greatly appreciated and benefited from the training received – for example, 98% were able to work without supervision by the end of the training, and 93% would recommend it to a friend. The report also highlighted that the programme had made progress towards its strategic aims but that challenges remained. The trainee cohort was more diverse than the wider sector, but still unrepresentative of the wider population. In considering prior educational attainment data, a similar picture was clear. 25% of the cohort held Master's degrees – a figure that compares favourably with the sector average of 50% - but suggests that barriers to entry may still exist.

In 2015, HLF commissioned Ecorys to undertake further interim evaluation work, this time focusing primarily on the cohort of organisations funded in 2013/14 (the second round of grants made through the Skills for the Future programme). The research found that the work of this grantee cohort had significantly contributed to the aims of the programme. The value of the programme to the grantees was clear, although some interviewees noted that there was still some way to go to address the skills shortages within the heritage sector. Funding to continue providing traineeships outside of Skills for the Future remained a challenge although, in contrast to the 2013 study, some grantees had developed new approaches to address this problem, for example by writing trainee posts into new funding applications as standard, or by exploring models where trainee host organisations contribute to the costs of traineeships.

2.2 The projects

Skills for the Future projects vary in length. The majority of projects funded in the first cohort in 2010 are now complete (45 of 54 projects); some received a grant extension and are still in delivery. Three projects from the second cohort (including 39 grantees) are complete.

Across both cohorts, to date, 48 evaluation reports have been received from grantees, representing projects that received HLF grants totalling £22,197,700. Forty-five evaluation reports have been received from grantees in the first cohort and 3 reports from those in the second cohort. The reports cover all heritage sectors: historic buildings; industrial, maritime and transport; land and biodiversity; museums, libraries and archives; the built environment; cultures and memories. The funds were distributed across the United Kingdom, with projects supported in each of the four nations.

2.3 The research

2.3.1 Scope

The aim of the research was to review and analyse the evaluation reports produced by 48 Skills for the Future grantees to establish the extent to which they demonstrate that the programme aims have been achieved. Although ongoing research had been carried out on the Skills for the Future programme, this is the first study which utilises the evaluation outputs produced by (or on behalf of) the grantees themselves. Evaluation is an HLF requirement for all projects it funds and hence it is an integral part of the Skills for the Future programme. Evaluation is covered in the application guidance for the programme; as such, grantees are aware of the value placed on the process by HLF. An assessment of the quality of the grantee evaluations provides useful information for both HLF and future grantees when considering their approaches to evidencing success, and also disseminating and using the findings.

The purpose of this Skills for the Future evaluation was three-fold:

- Measure the extent to which the programme aims have been achieved on the basis of the information provided by grantees in their evaluation reports.
- Review the methodology, structure, content and quality of the grantees' evaluation reports.
- Provide recommendations to HLF (and future grantees) with a view to improving the quality and usefulness of project-level evaluations.

2.3.2 The methodology

In order to achieve these multiple objectives, and provide the most comprehensive answer to the research questions, we developed a two-pronged methodology, based on a synthesis of the findings of the 48 complete evaluation reports along with an assessment of the quality and usefulness of these evaluations.

2.3.2.1 Synthesis evaluation

The first component of the methodology was a **synthesis evaluation**, through which we have reviewed, analysed and compiled the findings of the 48 grantee evaluation reports. In order to do this, we built a framework to capture and aggregate the information reported by the grantees in their evaluation reports. This framework illustrates how the programme's intervention logic has been applied through the individual projects, providing evidence of the need for the HLF funding intervention, the inputs of the projects (additional to HLF grants), and their outputs, outcomes and impacts. More precisely, the framework contains information on the following:

- **Needs:** heritage and generic skills shortages identified by the grantee as being an issue in the heritage sector. This section also identified gaps in the diversity of the workforce (e.g. based on gender, age, socio-economic level, ethnicity or disability);
- **Inputs:** this section covered both financial and human resource inputs that supported the project, including the grant received from HLF, the partnership funding achieved and the support leveraged from other sources. In terms of human resources, the framework includes the number and category of staff allocated to the project;
- **Activities:** in this section we included a review of recruitment activity, the number of trainees (both planned and actually recruited), the duration of the traineeships, the training activities developed for trainees (on-the-job training and classroom based), the support offered to trainers as part of the project and the number of organisations who benefited from a trainee, also highlighting the number of partnerships that were new for the grantee organisation;
- **Outputs:** the evaluation team compiled the outputs achieved by the projects in terms of number of trainees that completed their placement and the number of accreditations that they achieved, as well as the new qualifications developed as part of the projects and any changes in recruitment processes that took place as part of the learning process of the grantee organisations;

Outcomes and impacts: the projects delivered outcomes and impacts in four different spheres: for the trainees, the trainers, the grantee organisations, and for the heritage sector and society as a whole:

- the trainees achieved outcomes such as developing new skills and securing a job;
- the trainers achieved new qualifications and developed new skills;
- the grantee organisations gained capacity to develop and deliver vocational training and experience working with other organisations, additionally they facilitated the sharing of good practice with heritage organisations and professionals;
- collectively, the grantees addressed the skills shortages identified by heritage organisations and potentially contributed to the safeguarding and sustainability of the UK's heritage.

- **Lessons learnt:** the final evaluation reports submitted by the grantee organisations included, in most cases, lessons learnt from the projects that can benefit the design and implementation of future projects in the heritage sector. The evaluation team has collected and analysed these lessons learnt, in relation to the following themes: recruitment, management, design and implementation of training plans, support for trainees and trainers, communication, monitoring and evaluation (see Table 5 on p. 28).

2.3.2.2 Meta evaluation

The second component of the methodology was to conduct a **meta evaluation**, through which we have reviewed the methodologies used by grantees in evaluating their projects, as well as the structure, content, overall quality and usefulness of their reports. In contrast with the synthesis evaluation, this meta evaluation was not focused on the findings of the grantee evaluations but on the processes used by the evaluators (internal and external) to obtain these findings, assessed against both HLF guidelines and recognised good practice for evaluation.

The table below sets out the scale used to assess the evaluation reports.

Table 2 Scale used to assess evaluation reports

Rating	Description
<i>Missing</i>	The standard is not addressed
<i>Unsatisfactory</i>	The standard is addressed but not at the level specified
<i>Satisfactory</i>	The standard is met
<i>Good</i>	The standard is exceeded
<i>Excellent</i>	The evaluation meets all of the standards in a manner that can be considered best practice among the sample of evaluation reports

This scale was utilised to evaluate the quality of the available reports in terms of planning, design (robustness of the evaluation framework and relevance of the evaluation questions), implementation (robustness of the methodology), and analysis and reporting. Each report was given a rating on a range of aspects we would expect to see covered by an evaluation (including approach to analysis, comparisons with the baseline, executive summary, background and context of the project, conclusions and recommendations and use of visual tools). Additionally, the team provided a score for the overall standard of the evaluation.

The final component of the methodology was an **online survey** to capture information on sharing and learning related to the evaluations completed by the grantee organisations. The survey was directed at the project managers of the 48 projects that had submitted their completed evaluations and covered the following topics:

- Background information about the evaluation (e.g. budget; whether it was delivered internally or externally);
- The use of a range of evaluation guidance provided by HLF, as well as other sources of advice;

- Usefulness of the evaluation process (for the project itself, future projects and the wider heritage sector);
- Approaches to dissemination of the evaluation findings.

The questions were primarily multiple choice or rating questions, though some open-ended responses were sought, particularly to allow respondents to more fully explain their perceptions of the benefits (or otherwise) of evaluating their projects.

The survey was developed and distributed by the Ecorys in-house survey team. The survey launched on 18 November 2016 and was originally open for a period of two weeks, although this was subsequently extended for a further week until 9 December. Former project managers were invited to complete the survey by email using a unique link. The survey was received by 35 of the 48 project managers (some were no longer contactable having moved jobs since the completion of the Skills for the Future project). Three reminder emails were sent throughout the three-week period, at the close of the survey, 28 former project managers had responded.

The responses to the online survey were analysed and the findings have been incorporated into this report. Due to the low numbers involved, it has not been possible to cross-tabulate responses by the demographic characteristics of the project (for example by location, project size or heritage sector), but where possible comparisons have been drawn across the cohort.

2.3.3 The report

This report presents the findings of both the synthesis evaluation (chapter three) and the meta evaluation (chapter four), drawing together the two approaches to present recommendations to HLF to support projects to achieve best practice in their evaluations in chapter five. The annexes of the report include a checklist of good practice in evaluation for use by grantees, along with copies of the research tools for the project.

Where quotes have been taken directly from evaluation reports they are acknowledged and referenced, while those from survey responses remain anonymous.

3.0 Synthesis evaluation: Reviewing the achievements of Skills for the Future grantees

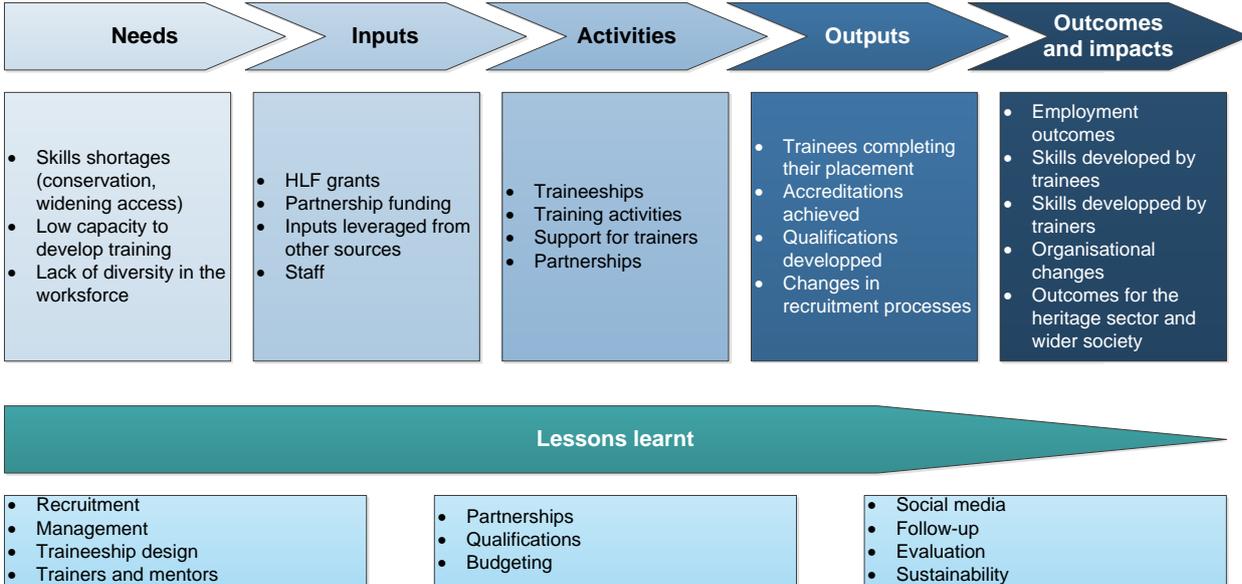
3.1 Introduction

In order to assess the extent to which the programme’s aims have been achieved, we compiled the information available in the 48 evaluation reports, using a grid to collate the findings across each component of an intervention logic framework. This covers needs, inputs, activities, outputs, outcomes and impacts.

In addition, we created transversal categories to reflect lessons learnt, following an emerging category method where new categories were to be created when a new lesson learnt would not fit in the existing matrix.

The different categories can be visualised in the diagram below.

Figure 1 Intervention logic of the Skills for the Future programme



3.2 Needs

3.2.1 Skills shortages

A total of 41 evaluation reports identified the skills shortages that the project sought to address:

- 37 reports identified a shortage of conservation or related skills.
- 19 reports identified a shortage of skills related to widening access to heritage.

- 15 reports identified a mix of both conservation skills and skills in widening access.

Taken together, the 48 projects attempted to address a wealth of specific skills shortages, as illustrated by the non-exhaustive list in the table below.

Table 3 Summary of conservation and sustainability skills identified in evaluation reports

Heritage sector	Conservation / Sustainability
Built environment	Stonemasonry, joinery and lead work Architectural ironwork Dry stone and earth walling Traditional building and repairs Archaeology
Industrial, maritime and transport	Skills associated with the restoration and preservation of vessels
Land and biodiversity	Species identification and surveys GIS, navigation and data management systems Habitat management Estate management and conservation Operation and maintenance of specialist tools (chainsaw, brushcutter, trimmers) Heritage farming (in a museum setting) and gardening Animal care (rare breeds)
Museum, Libraries, Archives	Digitisation of collections Transcription of records, collection photography Researching heritage objects Documentation and collection management, using collection databases, archives and cataloguing Care of collections Research techniques Palaeographic skills
Intangible heritage	Oral history interviewing, transcribing, recording and editing Community engagement, interviewing techniques and leading reminiscence groups Digitisation
Cross sector	Conservation techniques Pest control Documentation Digitisation, operating machinery, craft skills to carry out building repairs, use of specialist software

Sources used to demonstrate skills shortages include Lantra¹ survey data, mentioned in several reports. Some reports presented an in-depth review of evidence of skills shortages. For example, the evaluation of Stockport Council's Skills for Heritage Project included a mention of the 2010 skills assessment and a 5-page update of that assessment based on the review of five pieces of research and an in-depth review of the Creative and Cultural Skills & English Heritage Historic Environment and Cultural Heritage Skills Survey. Sources cited included informal conversations with partners in the heritage sector. However, as far as the evaluation report is concerned, a number of projects seem to have made their own skills needs assessment.

The focus is unsurprisingly on practical skills. There is a recognition across projects and sectors that many schools and universities do not prepare individuals adequately for the majority of jobs in the heritage sector. Many of these roles require specific technical skills that are best learnt through on-the-job training.

In terms of widening access to the heritage sector, most skills identified are common across the sector. They include:

- Volunteer management: planning, managing and delivering volunteer programmes, including recruitment, training, supervision, etc.
- Visitor experience: front-desk skills, leading guided tours, understanding the needs of different audiences.
- Developing and implementing exhibitions, events, workshops, etc.
- Community engagement: engaging with children and young people, providing outreach services, creating links with the local community and community organisations, running public consultations.
- Communication: generic verbal and written communication skills, use of digital and social media, public speaking, engaging online audiences.

In addition, a number of project reports also identified a need for other non-heritage specific skills, often related to project management skills (budgeting and planning, managing time and resources, etc.) and fundraising. These skills were identified as useful and needed for the organisations, and for the heritage sector, but they also proved to be easily transferable to other organisations and sectors.

3.2.2 Lack of capacity to deliver training

Here, the main focus is on the lack of practical, hands-on training delivered by the education sector, especially in higher education.

“The [Skill for the Future project] made a fundamental contribution towards bridging the gap between University and a subsequent career in conservation because it gave the trainees new practical skills in conservation management that were lacking through the

¹ Lantra is a nationally recognised provider of training and qualifications. <http://www.lantra.co.uk>

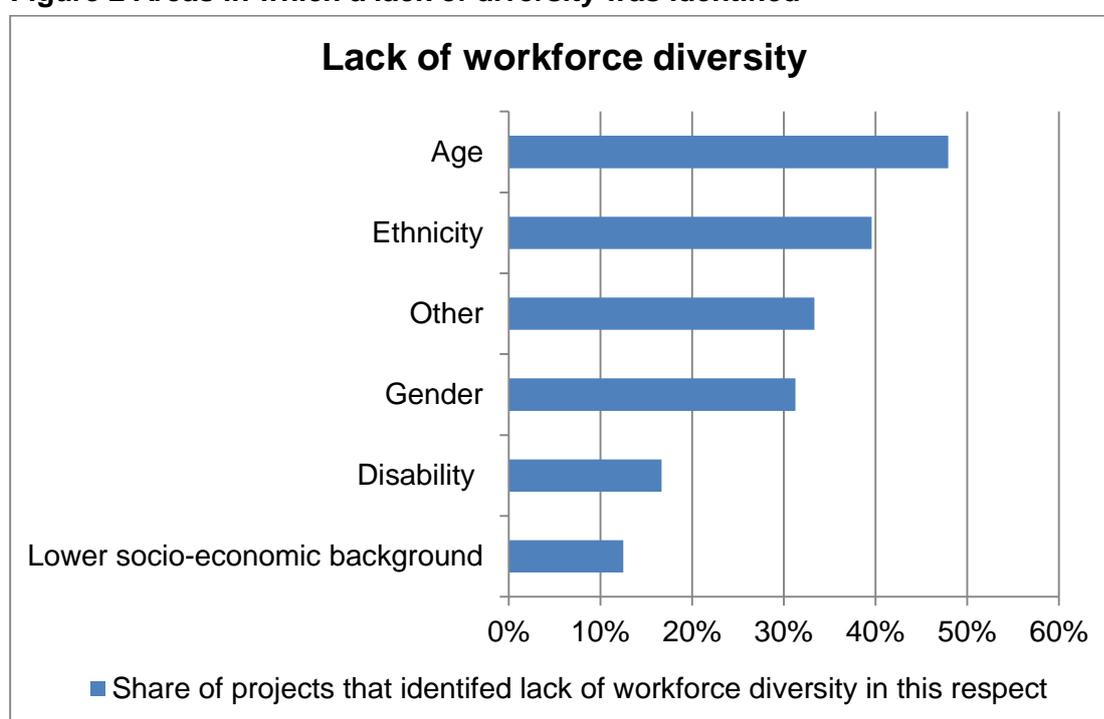
formal higher education system.” (Evaluation of the North Pennines AONB Conservation and Land Management Scheme 2011 – 2015)

Some reports also note a lack of provision or infrastructure to support a specific skillset, for example accredited conservation skills for blacksmiths, or an insufficient recognition/ accreditation of work-based training.

3.2.3 Lack of diversity in the workforce

Grantees that received funding through the Skills for the Future programme were expected to make efforts to increase the diversity of the heritage workforce. Unsurprisingly, more than three quarters of the evaluation reports (38 out of 48) mentioned a lack of diversity in the sector in some respect.

Figure 2 Areas in which a lack of diversity was identified



The characteristic that was most commonly cited as a source of limited diversity is age (in 23 instances, or almost half of the reports under review), and in all cases it refers to a lack of young people aged under 25 in the sector.

The second most commonly cited characteristic lacking in the heritage workforce is ethnicity (19 or 40% of the reports), with most projects referring to the general concepts of BME, BAME, or BAMER¹ rather than a more specific ethnic group.

In terms of gender (15 reports or 31% of the total), there is reference to a lack of women across all heritage sectors, although one evaluation report mentions that men are under-represented in the area of museums.

¹ Black, and Minority Ethnic; Black, Asian, and Minority Ethnic; Black, Asian, Minority Ethnic and Refugee

The “other” category covers education levels, for example, non-graduate applicants, and employment status, for example, young people who are not in education, employment and training (commonly referred to as NEET). It was mentioned on several occasions that due to the labour market situation in the heritage sector, with many more interested applicants than positions available, graduates regularly crowd out non-graduates in positions where a university degree should not be required. In this respect, Skills for the Future was seen as an opportunity to give non-graduates a chance to gain access to positions at the appropriate skill levels.

In terms of targets, only 16 evaluation reports reference setting a quantitative target in at least one of the areas identified for improvement: less than half of those that identified a lack of workforce diversity in the reports. The targets that were mentioned vary: in terms of age, most projects that identified a target had reserved 100% of the positions for young people; in terms of gender, they range from 15% to 50% of women applicants; for ethnicity and disability, the targets range from 5% to 30%.

3.3 Inputs

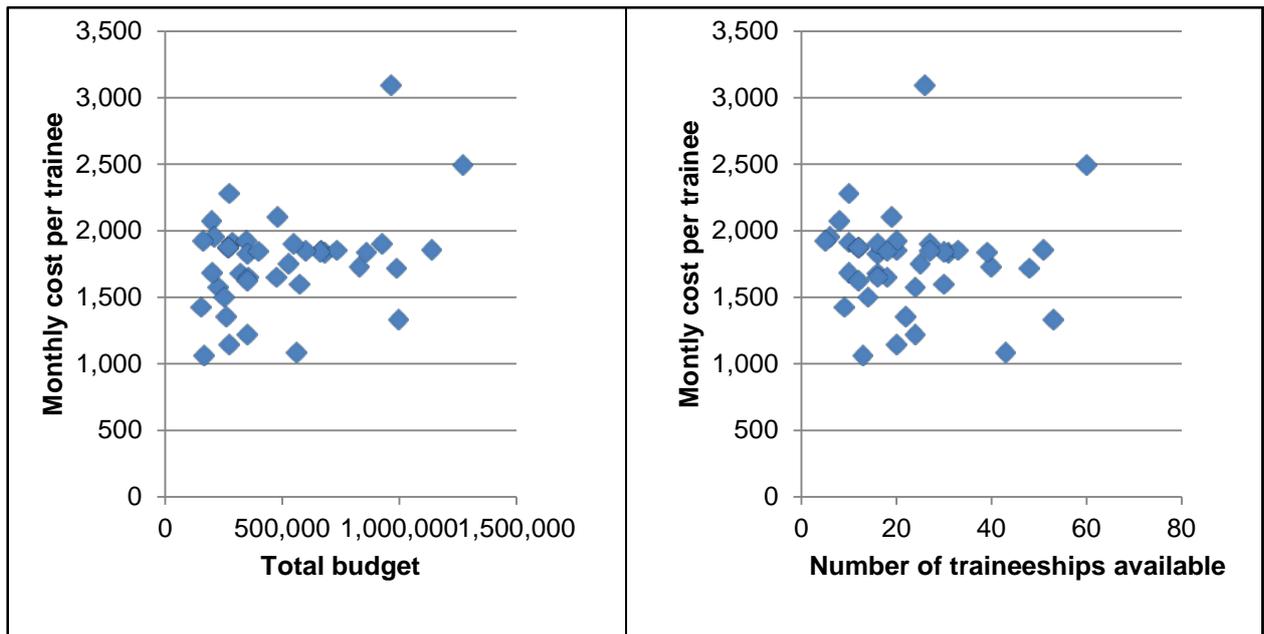
The aggregate value of the grants for the 48 projects under review is £22,576,700, which works out at an average of £470,348. However, the individual values of the grants vary greatly, from a minimum of £100,900 to a maximum of £1,271,700.

Only 18 evaluation reports out of a total of 48 mention the value of the grant received, which could be interpreted as a lack of interest in evaluating the value for money of the projects. It is, however, an important element of the context when appraising project results, and this is clearly a weakness of a majority of the evaluation reports.

Despite the lack of evidence about funding and budgets in most evaluation reports, we were able to carry out some analysis based on the information available in the programme database shared by HLF. As the charts below show, there is no apparent link between the cost per trainee and either the total size of the grant or the number of trainees (if there was a correlation between these variables, the points would be arranged in diagonal lines). In fact, the only two projects with an estimated cost per trainee per month of above £2,400 are both larger projects, with HLF grants above £900,000. Again, the information available in the evaluation reports did not allow us to explore the reasons for these differences.

We estimate the cost per month of a traineeship to be around £1,600, or around £19,000 annually, below the HLF guidance (applicants were invited to keep all project costs under £25,000 for each 12-month full time trainee per year). In the grantee evaluation reports it would be valuable to have a breakdown of the budget spent on (i) the bursary grants paid to trainees, (ii) training activities and (iii) direct supervision of the trainees and, (iv) management and administration. In the evaluation reports under review, this information was not available and therefore makes any attempts to measure the cost-efficiency of the programme from these sources very difficult. As set out in HLF application guidance, one would expect to see a high proportion of budget spent on the trainees or their training activities, with management and administration kept to a minimum while still providing the necessary level of support.

Figure 3 Monthly costs per trainee plotted against total budget and number of traineeships



The majority of the projects under review were funded in 2010, shortly after the 2008 crash and at a time when HLF made it clear that 5% match contributions were acceptable. Nevertheless, in terms of funding leveraged by the project, we found eight examples where the evaluation reported that additional cash contributions were made to the project budget, mainly from the grantee organisation themselves, their trustees or their partners in the project (placement hosts). For those eight cases, the proportion of partnership funding varies greatly, with a maximum of 20%.

Grantee organisations and their implementation partners also contributed to the project in many other ways: staff time (project managers, trainers, mentors), use of venues, free places on existing training courses etc. There are also several mentions of volunteers contributing to the project, as trainers or mentors to the trainees. Overall, 21 evaluation reports mentioned some kind of leverage (cash, staff time, volunteer time, in-kind contributions), but only six reported their direct or estimated monetary value.

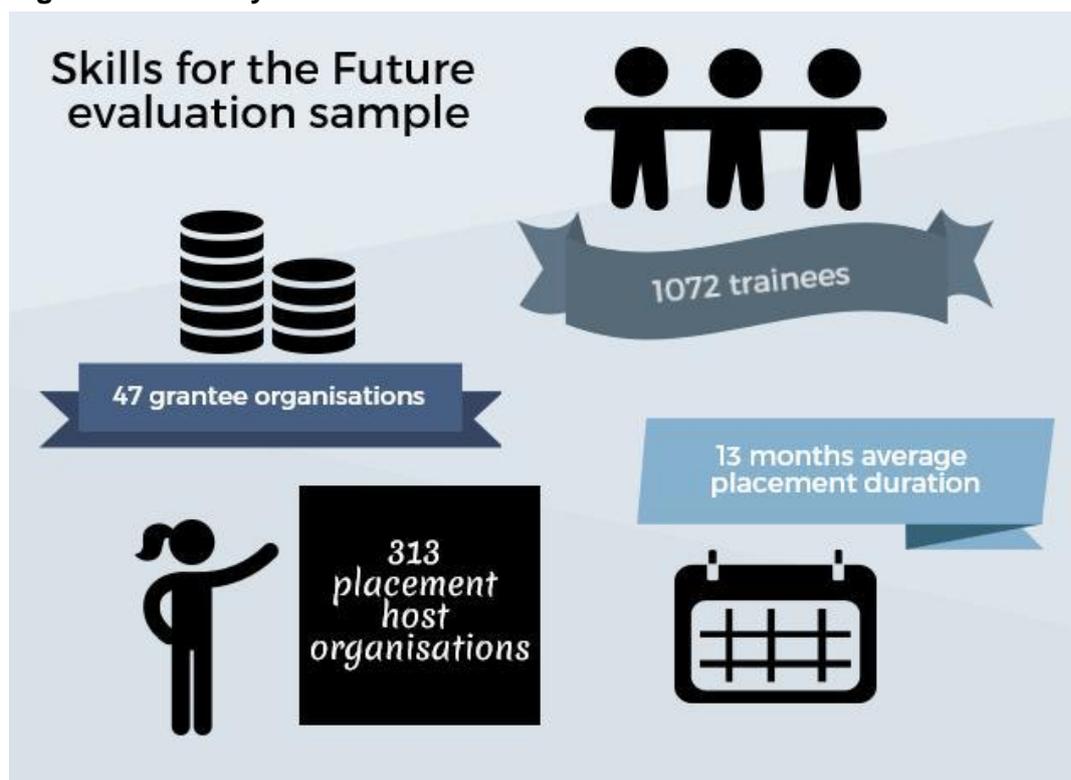
In terms of staff required to deliver the projects, the reporting of staff inputs was very uneven and incomplete. Where reported, it seems that the coordination of the project usually requires at least a part-time role. Only three reports mention the recruitment of a project manager with a where at least 80% of their time was dedicated to the Skills for the Future project.

Unsurprisingly, these three projects are among the programme's largest, with a grant value over £500,000. There are, however, numerous accounts of how many grantee organisations underestimated the efforts and time required from the person managing the project, thinking existing staff would be able to take on this task in addition to their current work. This often resulted in delays in putting in place the support and infrastructure necessary for a successful placement, and often ended in recruitment or secondment of additional staff (HR specialists in some cases) to the project.

3.4 Recruitment

Altogether, the 48 projects under review offered 1,079 traineeship positions, and recruited 1,072 trainees – this being the balance of some projects recruiting more trainees than planned and other fewer trainees, for example when faced with a lack of suitable candidates applying for positions where travel to work was involved. The traineeships lasted between three and 18 months, with the average just under 13 months. At least 313 organisations¹ were actively involved in the projects by receiving trainee placements.

Figure 4 Summary of the evaluation cohort



While information on the number of applications received is not available across all the projects, it is clear from the reports that many grantees were flooded with dozens or sometimes hundreds of applications. The only exception was in cases where only applicants with a very specific existing skillset were considered (blacksmiths, for example). The high level of interest was potentially overwhelming for some organisations, which reported delays in sorting through the applications (especially when no online system was used). Some had to contract recruitment agencies to deal with the high volumes of applications.

In terms of the diversity of the recruited trainees, less than half of the evaluation reports (21 projects) contain data about their demographic breakdown. Although this is actually more than the number of evaluation reports that include targets with respect to the diversity of the workforce (16), there is a poor match between the two groups. Only six evaluation reports

¹ We say “at least” because the number of organisations involved was not always explicitly reported in the project evaluations. However, this figure may include some double counting if and when organisations received trainees from several Skills for the Future projects.

contain information on both the target and the result achieved, making it very difficult to come to any judgement on the workforce diversity aspect of the programme from the self-evaluation reports. The most commonly reported figure is the gender balance in the population actually recruited (12 mentions) – maybe because it is easier to report data on gender, compared to other demographic variables.

Several evaluation reports made explicit references to difficulties in reaching out to black, Asian and minority ethnic groups, such as:

“We had more difficulty in recruiting individuals from different ethnic minority groups. This was despite advertising widely within a range of local and more specialist media. We might have to re-think our strategy in terms of how we promote opportunities when aiming to recruit from these under-represented groups in the future.” (Heritage Skills at Wildwood)

The interim evaluation of Skills for the Future¹ explores the issue of diversity in the heritage workforce more fully. These reports found that projects had generally carried out significant work to attract a diverse pool of candidates for the traineeships, although had faced a range of difficulties. It is interesting to note that this work and these issues have generally not been reflected in the project’s own evaluations.

3.5 Activities

The evaluation reports usually include a good description of the training activities available for the Skills for the Future participants. While the vast majority of the projects focused mainly on on-the-job training (learning by doing under the supervision of a highly skilled supervisor), many also included classroom-based or equivalent activities, often with a lesser intensity (for example four days of on-the-job training and one day of classroom training). Classroom-based training was often linked to the preparation of a recognised qualification (heritage-related post-graduate certificates, NVQs or SVQs, etc.)

When involving several host organisations, some projects offered the opportunity to trainees to learn from several of these providers by rotating between them (for example, four three-month training periods in four different organisations) or in some cases by going to an “alternate placement” one day per week.

The structure of the training activities varied greatly, reflecting the variety of organisations involved in terms of sector, size and focus, and the different trainee profiles in terms of age, experience and level of education. There is no evidence of one model in particular being found to be more efficient than others: one-to-one coaching, shadowing, guided self-learning and mentoring, supervised group work, tours and visits, etc.

¹ [HLF skills future evaluation](#)

Trainees in several organisations were also allocated time to work on personal projects, which proved to be highly successful with the trainees, their host organisations and the subsequent employers when consulted. Individual projects allowed trainees (mostly young people with little to no experience in managing their own projects) to apply the skills learnt in a practical way and to increase their project management (including managing a small budget earmarked for their project) and soft skills. Host organisations usually reported that the projects made a direct impact on their organisations and their users or visitors. Moreover, these projects were a valuable opportunity for trainees to showcase their abilities and increase their attractiveness to future employers.

Box 1 Example of benefits for trainees from individual projects

The following is an excerpt from an evaluation report, noting the multiple benefits for trainees from carrying out individual projects.

The projects provided trainees with a unique opportunity to experience the full project lifecycle including all of the following:

- Developing their own idea from scratch
- Taking that idea through the formal [internal] approval process involving writing a business justification and costing
- Preparing a detailed project plan
- Having full responsibility for project budget (£200 provided from [internal] budget, but many trainees secured more money from department budgets or external sources).
- Having full management responsibility for procuring the resources, staff time, volunteer time, materials, contractors etc.
- Having full management responsibility for publicity in support of their project, e.g. press, radio and web.
- Having full management responsibility for execution of the work to plan, including monthly communication of progress (in a short progress report) to senior Trust staff.
- Closing the project and writing up the results in a project summary.

Source: Developing Green Talent Project (DGT) Evaluation Report, Berkshire Buckinghamshire Oxfordshire Wildlife Trusts

Another feature to note as far as the training activities are concerned is the high consensus that exists among grantees and evaluators that the best training programmes are achieved when they are developed jointly between the trainee and the host organisation and reviewed regularly during the placement period. Learning Agreements seem to be a common and successful way to structure these programmes. This confirms that HLF was right to suggest the use of learning agreements as a way to structure the traineeship programmes, as learning agreements have been praised in both internal and external evaluation reports.

Classroom or group-based activities were highly valued by trainees in projects that were geographically dispersed, as they saw these not only as an opportunity for formal training but also for informal sharing between themselves. For instance,

“A further benefit of attending the Certificate was that trainees would be able to meet together to share experiences and develop their peer support group and other networks.” (Nurturing Worcestershire's Treasures and Skills for the Future)

“[A] minibus provided the project with the necessary resource to get access to the remoter areas of Scotland, where there is a lack of ecological data. The minibus was also an opportunity for the trainees to build the team spirit, just by spending a lot of time together and getting to know each other – and the various guests that accompanied the team on excursions.” (Developing Ecological Surveying Skills)

Finally, formal induction activities upon entering the traineeship programme were seen as positive when introduced, and this was often noted as an obstacle to a prompt and successful start when it was missing. For example,

“An improved induction pack could help to alleviate the pressure on staff to explain how the organisation works to each cohort of trainees.” (Southwest Skills Programme)

“[The induction] needs to be reviewed for future training programmes so that more time is initially spent with each department so that trainees gain an understanding of each department’s role and how everything fits together in the Museum’s structure and operation.” (Championing Sustainability in Heritage).

Only 11 evaluation reports (23% of the total) mention training activities for trainers, with another three mentioning other types of activities to support the staff involved in the programme (for example, project management training provided to the steering group). Again, it is difficult to know whether the other 37 projects developed support for the supervisors and staff involved in the programme (or if just was not the focus of the evaluation). One evaluation did note that this was one aspect to improve in the future, recommending to:

“Prepare supervisors with a longer induction process including taking an active part in designing the role and in recruitment visits”. (Tate’s Skills for the Future programme)

Of the projects where training for trainers was mentioned, support included training in mentoring and coaching, delivered externally in several instances. One project (Heritage Specialist Apprenticeship Programme in Wood Occupations) had a specific focus on training the trainers. It offered the opportunity for three trainers to participate in a Continuing Professional Development (CPD) programme as part of the project, with a view to “to ensure a legacy outcome from the project so there would be increased expertise in heritage wood skills embedded within three different training colleges in Northern Ireland.” Another project (Sustaining Traditional Building Skills in Northern Ireland) had the explicit objective of improving the training delivered in Further Education (FE) Colleges by working with their trainers, delivering a programme“ for FE college lecturers to improve their knowledge and understanding of conservation, repair and maintenance.”

3.6 Outputs

3.6.1 Trainees

Notable is the very high retention rate and the fact that the number of trainees completing their placement or leaving to take up employment in the heritage sector (1,006) is only marginally lower than the number of trainees recruited (1,072), implying a shortfall of just 6%. This is a clear sign that, on the one hand, the training programmes developed as part of the projects were of a high quality and corresponded to the trainees' expectations, and, on the other hand, that recruitment processes were sufficiently robust to select candidates with a suitable level of abilities and motivation.

On occasions where trainees left the programme early, to take up employment in the sector or for other reasons, there is evidence in the evaluation reports of efforts being made to reallocate the position to another trainee, with an evident level of support and flexibility on the part of HLF. Sometimes, this was integrated in the project design, as in the case highlighted below.

Box 2 An example of trainees being encouraged to take up employment in the sector

In year 1, all four placements were a year in length with a focus on Practical Conservation, and all four trainees remained for the complete training year. In year 2, one placement focussed on Community Engagement whilst the other three remained as Practical Conservation. One trainee found employment after approximately 6 months in placement, which gave [the grantee] the opportunity to reflect on whether it was always in the trainees' interest to stay in placement for the full 12 months. It was concluded that trainees would be encouraged to apply for jobs, and leave the scheme as soon as they were ready, and with the agreement of HLF any underspend could be utilised to offer additional training placements.

Source: Dorset Wildlife Trust Conservation Skills Programme, Evaluation Report February 2016

Overall, evaluation reports do not place a lot of emphasis on the programme's dropouts, as it is clearly a marginal issue when one excludes the trainees who left the programme to take up heritage employment. With such a large number of trainees, it is inevitable to find some isolated cases of trainees being unhappy with the programme or of disciplinary problems, but we did not find evidence of structural issues leading to trainee drop out.

With an average duration of over 12 months, it is obvious that host organisations also benefited directly from the trainees' work, resulting in more or better services. While such service enhancements are not an explicit aim of the Skills for the Future programme, the hundreds of thousands of working hours that are de facto subsidised should be noted as an indirect output of the programme for the heritage sector. Most evaluation reports take notice of the contribution carried out by the trainees as part of the training programme, and usually report a high level of satisfaction among host organisations with the quality of that effort.

3.6.2 Qualifications and accreditations

At least 838 qualifications and accreditations were achieved as part of the programme, according to the self-evaluations, including the following (non-exhaustive list):

Table 3.4 Examples of qualifications and accreditations

Type of qualification or accreditation	Details
NVQ Level 2	Stone masonry Joinery Lead work Metal roofing Marine engineering Environmental conservation
NVQ / SVQ Level 3	Heritage building Cultural heritage Historic vessel conservation Heritage skills (construction, wood occupations) Cultural and heritage venue operations
City and Guilds diploma	Work-based horticulture Lead worker certificate
Other specialist qualifications and accreditations (bespoke)	Construction Industry Training Board National Historic Ships National Heritage Ironwork Group Victoria & Albert Museum

A number of evaluation reports mention that these were new qualifications for the organisation, meaning that they increased their capacity to offer accredited training to their workforce in the future. In total, 16 evaluation reports explicitly mentioned that they had created new accredited training schemes or learnt to implement schemes that already existed but were new for them.

Bespoke qualifications were created where existing qualifications did not reflect the specificities of the heritage activity at the core of the project, such as historic vessel conservation. Some projects also opted to combine a generic qualification with a bespoke one focused on the gaps not covered by the existing standard. Examples of bespoke qualifications created through the programmes include:

- Scottish Qualification Authority (SQA) assessed Professional Development Award (PDA) in Ecological Surveying (Developing Ecological Surveying Skills)
- BTEC (Business and Technology Education Council) Level 3 Diploma qualification in Historic Vessel Conservation (Keep History Afloat - Traditional Boat-building Skills for the Future)
- Oral History NVQ in Cultural Heritage (New Pathways).

Other projects made the explicit choice to maintain their focus wholly on on-the-job training and not to seek accreditation, in some cases because qualification frameworks were not available.

Some supervisors also received accreditation for their new or improved training skills, such as four TAQA (Training, Assessment and Quality Assurance) Level 3 awards in the Wild Career Choice project. The “Assessing Vocational Achievement” Level 3 certificate and the “Internal Quality Assurance of Assessment Processes and Practice” Level 4 Award were gained by staff at Glamorgan Archives and its partner organisations as part of the Conserving Local Communities Heritage (CLOCH) Project.

3.6.3 Recruitment processes

The outputs of the programme also include new recruitment processes, developed either internally or by external Human Resources specialists, and changes in existing recruitment processes at the grantee organisations, as reported in 20 evaluation reports. Almost all of these developments went in the same direction: first, a shift in the focus from formal qualifications and experience towards enthusiasm, motivation, aptitudes and eagerness to benefit from the training programme. Second, traditional one-to-one interviews were often replaced by more dynamic and engaging activities such as group work, demonstrating hand skills and informal discussions with supervisors.

Other changes include better advertising of opportunities such as shorter and clearer role descriptions, and use of new advertising platforms to reach a wider and more diverse audience. For example, the Birmingham Museums Trust (Natural history knowledge, social history skills and other curatorial trainees project) advertised the traineeships in local Job Centres in order to increase its reach. It is worth noting that innovative advertising is not always successful: for example, The Construction Industry Training Board of Northern Ireland (CITB NI - Sustaining Traditional Building Skills in Northern Ireland project) reported taking “considerable time” to deal with unsuitable candidates applying through the Gumtree website.

One project (Tate’s Skills for the Future programme) included a training session for trainee supervisors in “recruiting for potential”, highlighting the importance of this aspect of the programme.

3.7 Outcomes

3.7.1 Outcomes for people

HLF’s intention is that beneficiaries of the Skills for the Future programme “develop skills” and “learn about [vocational training in] heritage”. This report’s description of the programme’s outputs in terms of focus, content and duration of the placements, as well as the high retention rate and the number and heritage-related qualifications and accreditations, is a clear indication of how the programme lived up to these expectations.

In addition, there is ample evidence in the evaluation reports of heritage-related skills having been developed by the trainees through their participation in the programme. When the sufficient level of detail is available in the reports, we also found a certain continuity between the heritage skill shortages identified, the training offer and the skills developed by the trainees.

The table below offers a summary of the skills developed by the trainees in conservation, in widening access to heritage and in other generic skills.

Table 5 Summary of skills developed by the trainees

Conservation and Sustainability	Widening access	Other
Traditional/heritage construction skills (dry stone walling and other traditional building techniques)	Use of social media	Project management (time management, budgeting, meeting targets, problem solving, etc.)
Flora and fauna observation, inspection, survey, monitoring and recording	Working with volunteers and diverse groups of volunteers	Teamwork and communication
Geographical information systems	Exhibition work and event management.	Business (basic self-employment skills)
Knowledge of relevant legislation	Development and delivery of learning programmes for different audiences, outreach work	Employability (including CV skills, interview techniques, use of relevant industry terminology)
Heritage horticulture skills (hedge trimming, whip planting, pesticides knowledge etc.)	Ability to lead school visits and learning sessions	Increased self-confidence, creativity, enjoyment, change in attitude and a wish to progress and learn more
Collection care and conservation	Community engagement techniques	Employability skills (CV writing, interviews, presentation)"
Digitisation and using library management systems	Verbal and written communication (How to give interesting and engaging talks to different audiences, marketing material, newsletters)	Computer skills and use of packages
Research skills	Front end visitor skills, including large groups, health and safety requirements	Taking initiative and responsibility
Assessing, maintaining, , displaying conserving and restoring objects to a museum standard	Dealing with public enquiries	Providing high-quality customer service
Pest management in museums, libraries and archives		Marketing and fundraising skills
Understanding the necessary Health and Safety procedures		Literacy and numeracy
Compost and waste management		First aid skills
Animal investigation or keeping (food preparation, health etc.)		Interviewing techniques
Use of specialist heritage software (e.g. collection management systems)		
Historic vessel conservation skills		

The high degree of satisfaction with the knowledge and skills acquired through the programme is clearly reflected in the evaluation reports, with comments such as:

“Overall trainees’ confirm that the quality of the training they received exceeded their expectations.” (Stockport Skills for Heritage)

“Almost all the interns we consulted confirmed that they had acquired all the skills that were specified within their agreed learning plan with the host organisation.” (Museums Galleries Scotland Interns Programme)

"[The trainees] consider the project had achieved its ultimate aim, in providing skills and experience to enable them to achieve employment in the heritage sector." (Developing heritage skills for the Digital Age)

“All of the trainees that responded to the follow up survey agreed that these skills gaps had been filled over the course of the year-long placement.” (A Wild Career Choice)

"The quality of training delivered by the project was considered by the trainees to be high. Only 3 trainee respondents gave the training they received on the project less than 8 out of 10 for quality." (Community Archaeology Bursary programme)

From the trainers’ perspective:

“All placement providers saw improvement in the skills of trainees and noted progression in skills but also in levels of confidence and the way they worked with others and integrated into the teams on site." (Foundations in Heritage: Learning core heritage skills in the workplace in West Wales)

The acquisition of relevant, practical skills and knowledge was reflected in the outcome of the programme for the trainees: for the 40 projects where data is provided, a total of 518 trainees were reported to have found employment in the heritage sector after taking part in the programme. This represents 59% of the number of trainees completing their placement in those projects. Of these, some were self-employed and some part-time.

Adding the 104 trainees who found a job in other sectors (or for whom the sector is unknown) and the 64 trainees who were reported as undertaking further training/study in heritage related fields, the rate of positive outcomes for participants increases to 78%, which can be considered a strong success.

The Skills for the Future programme was intended to benefit non-trainees too and to build general capacity in the heritage sector to deliver vocational learning confidently. Beside supporting trainees in developing heritage related and general skills and knowledge, 22 evaluation reports mention an increase in the skills of the trainers, as a result of taking part in the programme. The skills mentioned in the reports include not only direct training and line management skills (some of them through formal or external training) but also a range of communication and interpersonal skills (including dealing with a more diverse set of people, including people from minority backgrounds and disabled people), as well as an increase in confidence levels.

As for the formal recognition of those improved skills among the trainers, as noted, six evaluation reports mentioned accreditation for the supervisors, including for example Assessing Vocational Achievement Level 3 certificate.

In line with the aims of Skills for the Future, there is evidence that the projects have contributed to a number of other positive outcomes for the heritage sector and for society, including:

- Increased awareness of the benefits of work-based learning amongst trainees, young people, grantee organisations and their partners, and other organisations both inside and outside of the heritage sector.
- Increased capacity to deliver training – training skills, training programmes, recruitment processes – among grantee organisations and their partners. The main obstacle to further intakes of trainees is usually the limited funds available for bursary payments or their equivalents, but even when the programme is not renewed in a similar format, there is scope for existing staff and volunteers to benefit from the increased training capacity.
- Increased availability of heritage workers with the necessary practical skills. When subsequent employers of Skills for the Future trainees have been contacted as part of evaluation, there was a general consensus that the trainees had developed the right skills for the job, and been given an appropriate level of preparation.
- Renewed and deepened partnerships between heritage sector organisations, with several mentions of ongoing dialogue and joint projects between delivery partners.

3.7.2 Outcomes for communities

The intended outcome for communities is that “more people and a wider range of people will have engaged with heritage”, with a focus on increasing the diversity of the heritage sector’s workforce.

As noted above, when looking at results in terms of recruitment, the project evaluations contain both positive and less positive aspects. On a positive note, the programme has certainly raised the awareness of the lack of diversity in the heritage workforce, in terms of ethnic and socio-economic background, disability, age, and gender (sometimes more male than female and sometimes the other way around depending on the heritage industry).

Furthermore, the programme gave the grantee organisations an opportunity to reflect and improve their recruitment processes, both in terms of advertisement and selection, in order to reach a wider audience and give a better chance of success to individuals who are highly motivated but have not had the chance to develop experience in the heritage sector. There is a broad consensus among project leaders and evaluators that the traditional main entry point to the heritage sector remains volunteer positions or unpaid internships.

One of the biggest differences made by the programme is that by providing a bursary to the trainees, it opened up the sector to people who could not afford to undertake an unpaid internship.

“Many [trainees] explained that they were not able to afford to volunteer full-time or to do a Masters which they felt were necessary to be shortlisted for roles.” (Museums Galleries Scotland Interns Programme)

“The bursary payments were a major benefit of the ‘Skills for the Future’ Programme – without these, many of the trainees would simply not have been able to undertake the traineeship, or said that they may not even have applied for the roles due to economic constraints. However, it was still a struggle for some financially, and without a supportive family or partner in work, it is doubtful that some people would have been able to afford to do the programme at all.” (Heritage Skills at Wildwood)

However, based on the evidence available in the evaluation reports, the programme seems to have only modestly managed to open up opportunities in the sector to a more diverse group. The project evaluation would have been a timely opportunity to reflect upon the reasons why most projects have failed to live up to the programme’s expectations in that respect, but unfortunately there is little to no evidence of findings or recommendations to improve the diversity of the heritage workforce.

3.8 Lessons learnt

The following suggestions are some of the lessons learnt reported in the evaluation reports, which we found particularly relevant or well supported, or were observed in a number of different reports.

Table 6 Lessons Learnt

Recruitment

- Job adverts and recruitment processes should emphasise enthusiasm and potential rather than experience in order to widen the pool of relevant applicants and to reflect the fact that taking part in the programme is only a first step in the heritage sector.
- Several grantees successfully implemented alternatives to the interview, better suited to recruit trainees, such as group activities.
- Managing the recruitment process for a Skills for the Future project is time-consuming, given the usually high volume of applications and the need to select the right candidates. According to the evaluations, it is better to make arrangements ahead of the recruitment phase to free enough time for it or outsource that service to a specialist.
- It is a good practice to include the future supervisors and the host organisations in the recruitment process.

Management

- A key success factor is the availability of the project coordinator and his/her eagerness to work alongside the trainees to find solutions to practical problems they might face.
- There is a need to make sure that trainers and colleagues have sufficient time to deliver training alongside their other roles.
- Applicants need to make a realistic estimate of the manager’s functions and the time required to deliver those functions, taking into account the specificities of each target group, the amount of pastoral care they will likely require, the number of host organisations, the training and accreditation requirements, etc. Several evaluations reported problems due to underestimating the time it takes to manage such a project.

Recruitment

Training plans

- Skills assessments and learning plans are highly valued by both the trainees and the grantees and host organisations.
- Wherever possible, training plans should be individualised to better cater for the different needs and aspirations of each trainee, and also to avoid providing training in skills that are already mastered. A successful model consists of having a core set of training common to all participants, combined with tailored training depending on each individual background.
- The opportunity to take responsibility for discrete projects, tasks and budgets is instrumental in developing the trainees' self-confidence and ability to demonstrate their capacities to future employers.
- The projects add more value when they focus on skills which are not taught in the education system. Often, this means technical skills that require practice and learning-by-doing, but in some sectors it can also mean other skills such as fundraising, managing a self-employment business, etc.

Support for trainees

- Overlapping trainees is a model which works very well and allows the more experienced trainee to mentor the new trainee, which also develops supervising skills. Trainees also help each other when running training and outreach events and there is continuity in the training delivery.
- Several projects found useful to link trainees with mentors (in addition to their supervisors) who can help them with fulfilling their career aspirations.
- As far as possible, it is usually positive to allow the trainees to keep the same supervisor throughout the project.

Support for trainers

- Trainers are best placed to support the trainees when they have been themselves selected (identifying persons with strong interpersonal skills) and properly trained, especially if they have no previous experience of dealing with trainees or apprentices.
- Trainers also welcome opportunities to network and share experiences with other trainers who deal with the same issue.

Communication

- Communication (between the manager, the supervisors, the trainees, the host organisations) is key to the success of the programme and allows the project manager to take corrective measures as soon as problems arise.

Monitoring and evaluation

- Robust monitoring systems, building on accurate baseline data and incorporating long-term tracking of participants (ideally beyond the life of the project), make reporting easier and ensure targets are informed and can be reviewed and adapted.
- Evaluation can have a higher impact when it is embedded in the project, triggering ongoing improvements, rather than completed once the project is over.
- It is particularly enlightening to seek feedback from trainees a significant time after they participated, as part of the evaluation exercise.

Current and future Skills for the Future grantees could use the following checklist to assess the quality of their evaluations and the design of their evaluations:

Planning

- ✓ The evaluation is planned and designed at the outset of the project
- ✓ The evaluation is embedded in the project to generate ongoing improvements

Design

- ✓ A robust evaluation framework is designed
- ✓ The evaluation framework sets out clear evaluation questions
- ✓ The evaluation questions are directly related to the aims of the programme
- ✓ The scope of the evaluation covers relevance, effectiveness, efficiency and sustainability

Implementation

- ✓ The evaluation is conducted by someone with the necessary impartiality
- ✓ The methodology is clearly described
- ✓ The methodology uses appropriate qualitative and quantitative data
- ✓ The methodology is robust (sufficient, unbiased and timely data collected)

Analysis and reporting

- ✓ The approach to analysis is clearly described and robust
- ✓ The analysis includes comparisons with the baseline
- ✓ The report contains an executive summary
- ✓ The report clearly presents the background and context of the project
- ✓ The report contains clear, useful and critical conclusions and recommendations
- ✓ The report includes visual tools
- ✓ The report is written to a high standard.

4.0 Meta evaluation: Reviewing the quality of grantee evaluation reports

A commitment to conduct an evaluation was a condition of all Skills for the Future grant awards, with grantees required to provide an evaluation report in order to release the final 10% of the HLF grant; indeed, HLF view evaluation as a core element of the programme. Skills for the Future grantees had access to a range of resources for planning and developing their evaluations. These included the grant application guidance notes¹, a guidance document on the subject of evaluation, meetings for groups of Skills for the Future project managers, advice from grant officers or mentors, and an online forum for project managers (an early pre-cursor to HLF’s current online community using an external platform).

A key requirement for this study was to conduct an assessment of the quality of the evaluation reports which have been received by HLF to date, taking account of aspects such as the structure, content and methodologies used. In order to do this, each of the 48 completed evaluation reports were assessed against criteria in four overarching categories (planning, design, implementation and analysis and reporting), with reports attaining a rating of excellent, good, satisfactory or unsatisfactory for each. Where the required information was not provided in a report, it was marked as missing. In order to analyse the success of each report, these ratings were assigned numeric values (with excellent rated as 4, and unsatisfactory as 1) and then averages were calculated for each category. Table 4.1 shows a snapshot of the evaluation matrix, taken from the section assessing the design of the evaluation. Each section provided space for the researcher to note their rationale for the scoring.

Table 7 Snapshot of evaluation scoring matrix

Design				
A robust evaluation framework was designed	The evaluation framework sets out clear evaluation questions	The evaluation questions are relevant to the aims of the Programme	The scope of the evaluation covers relevance, effectiveness, efficiency and sustainability	Comments on design
Good	Missing	Missing	Unsatisfactory	The evaluation includes a logic model of the intervention but does not include evaluation questions and does not cover some key aspects (efficiency and effectiveness). It is focused on the quality of the training but does not include outcomes and impacts.

¹ [HLF Application guidance](#) Page 13

In this case, the project would have achieved a score of four for the design category, with three 'points' awarded for the good rating for the evaluation framework, none for each of the missing ratings, and one for the unsatisfactory rating.

This section of the report explores each of the four main assessment categories in turn, supplementing the results with insights from the project manager survey where appropriate. The chapter section headings denote the average score achieved for each aspect of the reports across the sample, with the highest score available being four (equating to an excellent rating).

4.1 Planning: average score achieved 2.13

Based on the survey findings and the meta-analysis of the project evaluation reports, this study sought to establish the extent to which grantee organisations had embedded the planning of their evaluation into the development of their project.

Only two survey respondents stated that their organisations had **not** set a specific budget for evaluation. Of the remaining 26 respondents, all had utilised part of their Skills for the Future grant to pay for the evaluation. Of these, three organisations had added some of their own funds to the total evaluation budget post-grant.

HLF recommended grantees allocate 1-3% of the HLF award to evaluation activity. Data provided by HLF showed that the average amount of funding requested from HLF to cover the evaluation costs was £3,520. The average grant awarded to the cohort of grantees included in this study was £489,248 meaning that on average grantees had allocated in the region of 0.71% of their funding to evaluation costs.¹

There was a fairly even split between internal and external evaluations; 23 of the 48 were conducted by external researchers, with the remainder being conducted by the grantee's own project staff. Of those who responded to our survey, there was no clear correlation between the size of the grant awarded and whether an external evaluator was contracted. A number of projects receiving grants of less than £200,000 engaged external evaluators. Two projects in the sample received around £1 million; only one of these grantees took on an external evaluator with the other choosing to carry out the evaluation using their own staff.

Respondents to the survey recognised the importance of evaluating their Skills for the Future projects; when asked whether they would have conducted an evaluation if it were not a condition of the grant, 27 of 28 respondents said that they would. However, respondents were given the opportunity to elaborate on this point and it was interesting to note that a number of respondents expressed that while they would still have evaluated the project, they may not have done so to the same level of detail. The compulsion to allocate funding to the task appears to have influenced the amount of work the grantees put in to the evaluation process.

¹ As a comparison, the Big Lottery Fund recommends that grant holders spend between 5% and 10% of their funding on monitoring and evaluation activity¹. However, a 2013 report exploring the evaluation activity of Big Lottery Fund grant holders found that 49% of grant holders allocated 1-5% of their budget to evaluation, with 28% allocating between 6% and 10%. [Big Lottery Fund Report](#)

As noted, HLF provides grantees with a range of support and guidance for conducting their evaluations. The survey asked respondents to what extent they had found each of these guidance mechanisms to be useful in designing and implementing their studies. One source of guidance was HLF staff. The survey respondents were divided as to whether they had discussed their evaluation plans with HLF officers: 57% (16 respondents) stated that they had. Of those who had received advice on evaluation from a grants officer or mentor, three-quarters had found the discussion to have been somewhat or very useful.

Survey respondents most commonly found the application guidance and the evaluation guidance to be most useful. The majority of respondents (25, or 89%) had found the information in the application guidance to be somewhat or very useful, and all respondents were aware of this information. A similar number found the evaluation good practice guidance to be somewhat or very useful, although one respondent was not aware of this guidance.

Respondents largely found the online forum less successful as a source of information about evaluation, with 31% finding it to be not at all or not very useful.

The meta evaluation awarded an average score of 2.13 (the equivalent of a satisfactory rating) for planning to the evaluations reviewed. This was based on two criteria; whether the evaluation was planned and designed at the outset of the project, and whether the evaluation was embedded in the project to generate ongoing improvements. Projects were largely able to demonstrate that evaluation had been factored in from the inception of the project, with 17 of the 48 reports assessed achieving 'excellent' ratings in this respect. A further 21 projects achieved either good or excellent ratings for embedding the evaluation; these projects had clearly demonstrated how they had taken on board feedback from the evaluation activities through the course of the project. Lower ratings were awarded to projects which only initiated evaluation work towards the end of their project delivery period, or which failed to demonstrate how they had taken on board learning from their evaluation during the course of their project delivery. Fifteen reports contained no information about this aspect of the project's evaluation activity.

Example of good planning for evaluation: National Historic Ships UK, Shipshape Heritage Training Partnership

The evaluation of the Shipshape Heritage Training partnership achieved an overall excellent rating in our review, and also specifically for the criteria for planning for evaluation. The review team felt that the evaluation process had benefited from good planning of the project as a whole; for example, the report demonstrated that monitoring systems were put in place at the beginning of the project to record learning outcomes, forming a key element of the evaluation.

The report also demonstrated that implementing the evaluation in the early stages of the project had allowed for reflection at the end of the first year of delivery, taking on board feedback from partners and trainees to make improvements in year two. It was positive to note that partners had been involved in the evaluation and monitoring process throughout the project.

Survey findings supplemented the review of the reports. For example, 78% of survey respondents (22) stated that the evaluation had helped to improve their Skills for the Future

project during its delivery. In their comments, a number of respondents explained how starting to deliver their evaluation early on in the project cycle had enabled them to take on board feedback to adapt their project for the remainder of the funding period. One respondent noted that by responding to trainee feedback gathered by the evaluator they had improved trainee satisfaction with their supervision processes. For another, the evaluation highlighted issues with the training schedule and approach, which was subsequently amended for the second trainee cohort, leading to a more successful programme from the trainee perspective. The respondent noted,

“For the second traineeship we made significant changes to the timing and amount of training which so far has been much more successful.”

Finally, another respondent emphasised the benefits of formative evaluation to the project’s delivery:

“We see on-going evaluation of any project as essential to enable improvements to be made to a project whilst it is being delivered, and to look at the project on completion to see what has been learnt from its delivery.”

4.2 Design: average score achieved 1.48

As the UK Evaluation Society’s guidance sets out, it is good practice in evaluation to demonstrate that the evaluation design and conduct are transparent and fit for purpose.¹ In line with this, the 48 Skills for the Future project reports were assessed for information about the evaluation design, taking into account:

- whether the report could demonstrate that an evaluation framework was developed (setting out which questions the evaluation is trying to answer and how),
- that the work was conducted in line with clear evaluation questions (which ideally would be relevant to the aims of the Skills for the Future programme); and
- whether the scope of the evaluation was sufficiently broad to cover issues such as relevance, effectiveness, efficiency and sustainability.

Grantee reports were largely ineffective in this area. For example, fifteen project reports failed to provide any information about their evaluation questions, and only three projects achieved an excellent rating for this criterion. One particularly good example set out clear evaluation questions which were based on the project objectives, and also provided a clear link between each of these objectives and the evidence being used to assess their success or otherwise. This example was rare, however; 12 reports provided unsatisfactory information about their evaluation frameworks, while 17 reports did not reference an evaluation framework at all.

Projects performed marginally better in setting out the scope of their evaluations for the reader; only four reports failed to provide information about this aspect, although where information was provided it was generally assessed as being insufficient. As a result, only nine projects achieved a good or excellent score in this respect. Reviewers noted that the scope of the evaluations was

¹ [Guidelines of good practice for evaluations](#)

largely focused on summarising project outputs and outcomes rather than taking a more contextual view and assessing project achievements for relevance and efficiency. It was rare that projects linked findings back to the aims of the Skills for the Future programme and HLF's objectives in supporting the project as part of a strategic initiative.

The average score for evaluation design was 1.48 – midway between unsatisfactory and satisfactory.

Example of good evaluation design: Stockport Council, Skills for Heritage project

The evaluation of Stockport Council's Skills for Heritage project was awarded an excellent rating for its design in our review. While it examines trainee outcomes in detail, the method was also put together to include a review of the project's impact on the Council and its operations, and impact on partners in the voluntary heritage sector. The report also examined how far the project has met HLF's aims, specifically in addressing skill shortages in the local and sub regional heritage sector. Taking a wider view of the project's impacts met our review requirement that the evaluation examine issues including relevance. The report also met review requirements of having a clear evaluation framework structured around learning outcomes, and lacked only a review of the value for money achieved by the project.

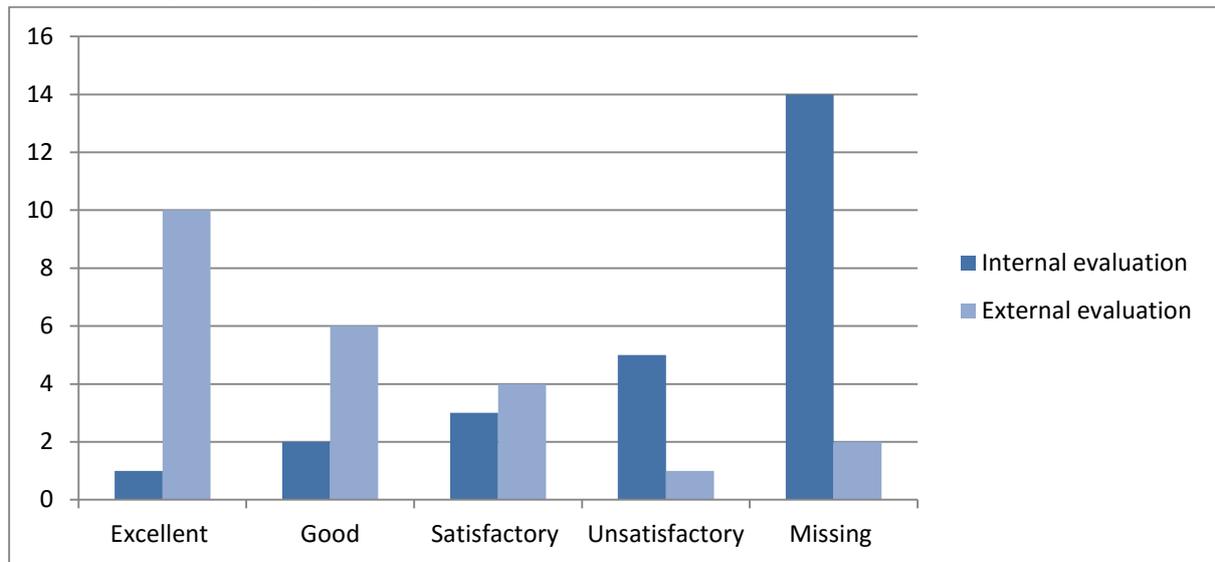
4.3 Implementation: average score achieved 1.97

The assessment of the evaluation reports had a strong focus on implementation, exploring to what extent evaluators described their methodologies and to what extent these methods were appropriate and robust. The UK Evaluation Society's good practice guidance emphasises the need for methodological robustness, even in cases of self-evaluation, and recommends that this be indicated in communication about the evaluation.¹

The review found that a third of the reports (16) provided no information about their methodology, leaving it hard to judge the validity of the approaches used in these cases. Where information was provided, reviewers were able to award good or excellent scores to 20 grantees for the use of appropriate data and approaches. However, a further 14 reports received unsatisfactory ratings in this respect, demonstrating a clear split between the cohort. This split largely correlates with whether evaluations were conducted internally or externally, and figures 2.1, 2.2 and 2.3 clearly show the contrast between these two factors on the three criteria relating to methodologies in the assessment.

¹ ibid

Figure 5 Comparing ratings for internal and external evaluations for the criteria “The methodology is clearly described”



As the charts demonstrate, the results for internal and external evaluations follow opposing patterns. For example, figure 2.1 shows that evaluations conducted by internal staff were far less likely to contain robust descriptions of their methodology, with only one internal evaluation achieving an excellent rating in this respect, compared to 10 evaluations conducted externally. Indeed, 14 of the internal evaluations contained no description of the methodology at all.

In the same vein, figure 2.2 shows that external evaluations were far more likely to utilise appropriate data in their evaluations; no internal evaluations achieved an excellent rating for this criteria, though ten received an unsatisfactory rating and four provided no information about this. In contrast, eight external evaluations were awarded an excellent rating, and seven achieved good.

Figure 6 Comparing ratings for internal and external evaluations for the criteria “The methodology uses appropriate qualitative and quantitative data”

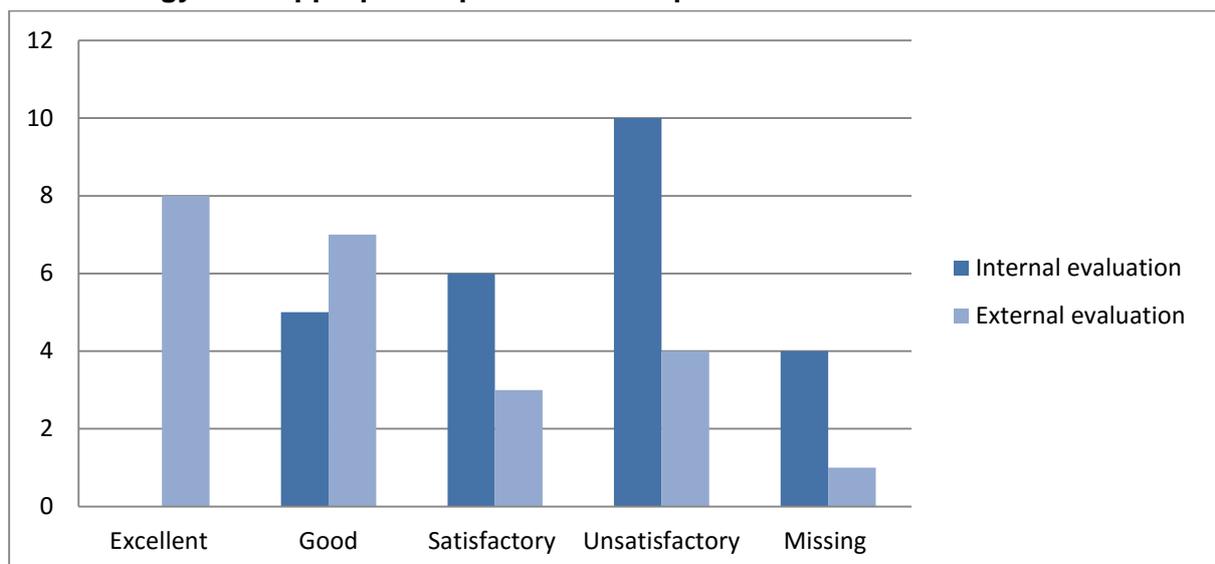
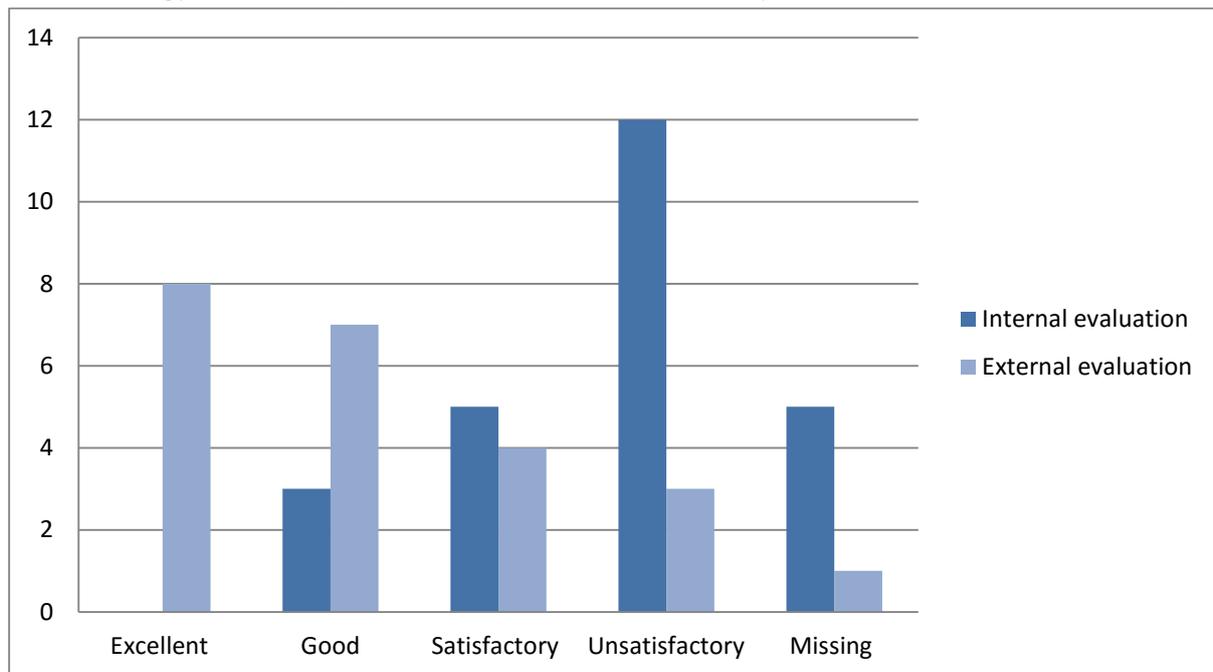


Figure 2.3 compares the difference in ratings for whether the methodology of the evaluations was robust for external and internal evaluations. As in the previous figures, the difference is marked; eight external evaluations were awarded an excellent rating while no internal evaluations achieved this. However, 12 internal evaluations were awarded an unsatisfactory rating, compared to only three external evaluations. This gives a clear message that evaluations conducted by external evaluators are far more likely to be methodologically robust.

Figure 7 Comparing ratings for internal and external evaluations for the criteria “The methodology is robust (sufficient, unbiased and timely data collected)”



There were some examples of good practice amongst the sample: 29 projects (60% of the total) provided detailed methodology sections which demonstrated the use of a variety of research tools (for example e-surveys, telephone and face-to-face interviews with a range of stakeholders and site visits). It was also the case, however, that project evaluations were often reliant on the use of existing monitoring data, rather than primary research. In such examples, there was often a heavy focus on feedback from the trainees, usually via their own self-assessments. There was also an over-reliance on feedback from project staff; it would have been useful for evaluators to seek the views of other stakeholders in the wider sector. In one example, the new employers of trainees who had completed their placements were interviewed, enabling the project to explore the usefulness of their training for the wider sector, an important focus for this strategic grants programme.

There were few examples of innovative methodologies amongst the 48 reports. One project had attempted a Social Return On Investment analysis (SROI), calculating the costs of the project against the benefits achieved. However, it failed to follow the good practice principles of a SROI.

The average score awarded for implementation was 1.97, equating to a satisfactory result.

In the survey, respondents were asked whether, with hindsight, they would do anything differently in terms of evaluating the project. The majority (19 of 28 respondents) were happy with the process, but 25% would have made changes. Of these, four stated that they would have adapted the methodology to focus on the wider impacts of their project, while three would have designed different research tools to capture data. Three respondents noted that they would have started the evaluation process earlier.

Interestingly, one respondent (whose organisation conducted the evaluation internally) noted that, with hindsight, they would have contracted an external evaluator. This message was echoed by another grantee who noted in their report that if they were to do anything differently they would:

“...Commission an experienced evaluator to assist with evaluating and reviewing the project, as this isn't something we have external expertise in, so for future projects we would look to bring these skills in.” (Biodiversity Trainees project)

However, another survey respondent noted that they did not feel that their external evaluation had been particularly successful despite working closely with the evaluator. In this instance, the respondent would have preferred to conduct the evaluation internally.

4.4 Analysis and reporting: average score achieved 2.10

In assessing the quality of the approaches to analysis, the research team considered criteria which included whether the approach to analysis was clearly described and appeared to be robust, and whether the analysis included comparisons with a baseline. One evaluation report provided a good example in this respect, taking data from a skills analysis undertaken by trainees when they first joined the programme and comparing it with data collected after completion of their trainee post, enabling a judgement of distance travelled and thus the success of the training programme.

However, a high number of reports did not evidence or describe their analytical process or even offer an analysis of project performance, merely presenting data without offering any interpretation. Many relied on the opinion of the evaluator in forming a judgement on the project, and some failed to provide even basic information such as the number of trainees recruited to the project or the number moving into employment.

A number of evaluators failed to produce a report that could act as a standalone document, making assumptions that the audience had accessed monitoring data or understood the context of the project. A complete report should offer a description of the project, its timeframe, its beneficiaries, taking into account the whole project cycle. It should also annex any relevant documents such as interim evaluation reports.

When judging the quality of the reporting itself, the team worked through a number of criteria. These included whether:

- The report has an executive summary.

- The report clearly presents the background and context of the project.
- The report contains clear, useful and critical conclusions and recommendations.
- The report includes visual tools.
- The report is written to a high standard.

The average score across all the criteria for analysis and reporting was 2.10, second only to planning in terms of the highest score achieved. However, when broken down, this figure was heavily influenced by the general quality of the report writing, which was high. The average score for the two analysis criteria was 1.08 (the lowest of all category scores, equating to unsatisfactory), whilst the score for the reporting criteria was 2.51. The average score for the standard of the writing was 3.44 – the highest of all categories in the assessment.

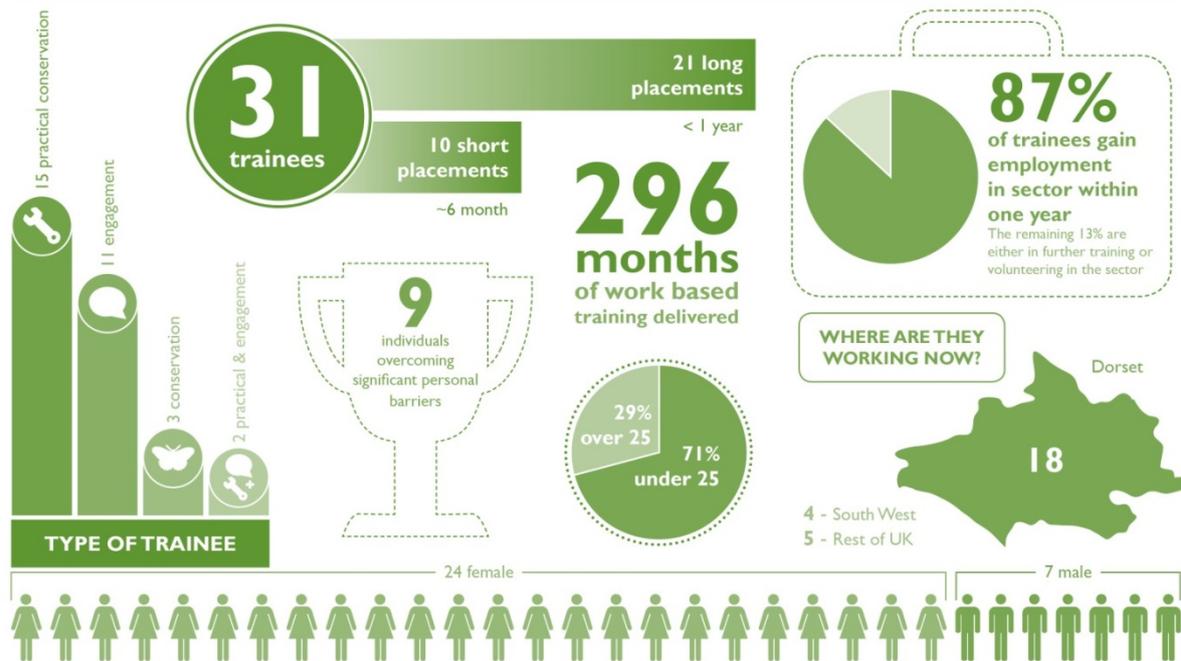
While the quality of the writing was high, the presentation of the reports was not always to the standard that one might expect of a good evaluation report. For example, the lowest scores across the reporting criteria related to the provision of an executive summary – a high number (18 of 48 reports) did not provide one at all. The executive summary is an important tool for sharing findings in a concise way with stakeholders who may not take the time to read a full report. Only half the reports received a good or excellent score for the use of visual tools for communicating findings in their report. In cases where visual tools were included, they commonly comprised photos, charts or graphs, but, more innovatively, infographics were used to good effect in some reports, as in the example below. Infographics such as these can be a very effective tool to disseminate the results of the evaluations, through social media for example.

Figure 8 Example of project infographics

Dorset Wildlife Trust

Conservation Skills Programme 2011 - 2015

Delivering high quality training for nature conservation in Dorset



Source: Dorset Wildlife Trust Conservation Skills Programme, Evaluation Report February 2016

However, the key concern for the assessment of this category is that a number of reports contained a lack of critical assessment of the project’s successes or otherwise, to the extent that some even failed to provide conclusions and/or recommendations.

4.4.1 Sharing evaluation findings

Grantees responding to the survey were positive about the findings of their evaluations, with 26 respondents noting that their evaluation generated findings which are useful for other organisations or the wider heritage sector. For example, one noted:

“The evaluation of the recruitment process has shown that it was a great success and these new techniques are being shared with other museums.”

While grantees felt that they had produced useful results for the sector, however, the survey found that organisations were not always sharing the results of their evaluations. Only ten respondents stated that their evaluation reports were available in the public domain, and while 20 respondents had shared their reports amongst staff in the grantee organisation, 13 had not shared their findings with people outside their organisation. As a key aim of the Skills for the Future programme is to ‘enhance the capacity of the heritage sector to deliver sustainable training and share good practice’, this is disappointing.

Where dissemination had taken place, it was primarily conducted by email (19 respondents) or through meetings, workshops or events (17 respondents). Dissemination was primarily focused on the report or a summary report, although five respondents noted that they had created a presentation or other visual tools, while one grantee had developed a toolkit from their evaluation. This reflects the findings of the meta evaluation and report assessment, which found less of a focus on presenting evaluation findings in a visual way.

4.5 Summary

After reviewing each of the categories in turn, the research team was able to provide an overall judgement on the standard of the evaluations. Table 2.1 sets out how many reports achieved each of the rating categories for the overall standard of their evaluations. While 17 reports achieved a good or excellent rating, 29 were satisfactory or lower. This equated to an average score of two across the cohort of 48 reports, an overall average rating of satisfactory.

Table 8 Overall view of the standard of the evaluation

Rating	Number of reports
Excellent	4
Good	14
Satisfactory	9
Unsatisfactory	20
Missing	1

4.5.1 Factors influencing the quality of project evaluations

In carrying out the meta evaluation and conducting an analysis of the findings, a number of factors which influenced the quality of the evaluations became apparent.

Firstly, there seemed to be a lack of understanding amongst grantees of the difference between monitoring and evaluation, and this particularly shaped the standard of the reports produced internally by project staff. These reports often focused on summarising existing data and presenting case studies without conducting a critical analysis, with reports reading more like a final report to a funder than an evaluation report.

The evidence from this study shows that external evaluation brings more robustness and validity to the evaluation process. However, the amount of funding committed by the grantees to the evaluation process proved to be somewhat restrictive. As noted, the average amount of funding grantees requested from HLF to be spent on evaluation sat at the £3,520 mark, just 0.71% of the average grant awarded to the cohort of projects included in this review¹. There is a limit to what can be achieved by an external evaluator for this sum, particularly given the size and scope of some of the projects involved. An analysis of the amount of grant requested for

¹ It is important to note that the project manager survey showed that some projects spent more on their evaluations than the funding they requested from HLF, supplementing with their own funds. However, we do not have access to a complete picture of how much additional funding was provided across the cohort, or indeed how many grantees did add their own funds.

use on evaluation against the overall rating achieved for the reports shows that those with higher scores (achieving good or excellent) had on average requested more funding for their evaluations than those achieving satisfactory, unsatisfactory or missing ratings (£5,356 – 1.09% of the average grant, versus £3,665 – 0.74%).

Another key factor influencing the standard of the evaluation produced, and particularly the structure of the report itself, was the (assumed) anticipated audience for the evaluation findings. As we have seen, grantees are not routinely sharing the results of their evaluations outside of their organisations, suggesting that they view the process as one of internal review rather than as a tool for influencing other funders and stakeholders or fulfilling the strategic aim of the Skills for the Future programme. Many of the comments provided by survey respondents support this theory, with a number focusing on the benefits of the evaluation in relation to organisational development. For example, one noted that the evaluation was:

“A really important opportunity to reflect on what had gone well and what could have been done better so that we can learn for the future. It was helpful to have an external eye on our project to spot things that we may have missed or not fully appreciated at the time.”

While some respondents talked about the evaluation shaping their approach to future project development and funding applications, few discussed the evaluation results as a potential tool to influence funders or other stakeholders. However, one grantee had specifically borne this in mind when developing the format for the evaluation, noting:

“One of our priorities from the outset was that our evaluation could be used to support stakeholder advocacy and further fundraising. This inform [sic] design of evaluation e.g. print & supporting film.”

It is likely that if more grantees recognised the potential benefits of evaluation as shaping external views of the organisation and project, as well as internal views, the standard of evaluation produced would be higher.

5.0 Conclusions

5.1 Achievements of Skills for the Future funded projects

The programme and the projects it funded have clearly been successful and there is a high degree of satisfaction amongst those involved. Some facts stand out across the majority of the 48 projects reviewed in the synthesis evaluation:

- The appeal of the training programmes for potential applicants (10 or more applications for each trainee position available being the norm for most projects).
- The low turnover of both hosting partners and trainees (most trainees who left the programme before the end of their placement did so because they found employment in the heritage sector).
- The consensus across all actors involved (grantee organisations, hosting partners, trainees, later employers of the trainees) that the work-based approach is a very effective way to provide new entrants with the necessary skills to pursue a career in the heritage sector, and that the trainees indeed developed useful practical skills through participating in the programme. Interestingly, this assumption seems to be valid across all skills levels, including university graduates.
- The very high rate of successful outcomes for participants. While not reported consistently across all projects, it seems to be the norm that more than half of the trainees subsequently found employment in the heritage sector, which would be considered a very high success rate for a programme aimed at inserting people into the labour market.
- The breadth and depth of skills learnt by the trainees. While the focus of most projects which received funding has clearly been on heritage-specific skills at the same time, both trainers and trainees reported the development of transversal skills such as interpersonal relations, project management, marketing and fundraising.
- The high-quality outputs produced by the trainees. The focus of the Skills for the Future programme is clearly on creating opportunities and addressing skill shortages in the heritage sector. However, given the duration of most placements (10 months or more) and the profile and motivation of the trainees, the programme actually resulted in a lot of work being carried out at the host organisations funded by the programme, with numerous reports of the difference made by trainees and their contribution.
- The change in perceptions; many organisations reported how their views on traineeship programmes have changed, after observing how the trainees delivered useful and high-quality work for their organisation, while injecting fresh ideas and a renewed enthusiasm to their teams. A number of host organisations went on to recruit some of their trainees at the end of the placement.

Carrying out project evaluations is also an opportunity to be critical and reflect on what could have been done better. In this respect, there are a number of lessons to be learnt from this cohort of projects, some explicitly noted in the grantees evaluation reports and others not.

Drawing on the grantees' reflections, recorded in Table 5 above we would particularly highlight three lessons for project managers to consider to ensure trainees have the best experience:

- Many grantee organisations underestimated the efforts and time required from the person managing the project, thinking existing staff would be able to take on this task in addition to their current work. This often resulted in delays in putting in place the support and infrastructure necessary for a successful placement. However, none regretted their involvement in the programme.
- There was a strong consensus that the best training placements are those which are developed jointly between the trainee and the host organisation and reviewed regularly during the placement period. Another key success factor is a strong match between the skills to be developed, the day-to-day work of the trainee, the host organisation's specialism and the supervisor's competence.
- Personal projects are a good way for trainees to develop their skills (heritage-related as well as transversal) and confidence. These were also found to improve trainees' employability by giving them an opportunity to showcase what they have learnt through the project.

More strategically, sector leaders might consider three further issues:

- The "workforce diversity" aim of the programme has been achieved with limited success. Data on this aspect of the programme is very limited as far as evaluation reports are concerned, which in itself indicates that either there was a limited interest in this issue amongst grantee organisations (and/or evaluators), or that the sector lacks the skills to collect and analyse demographic data effectively, or that the approach followed was not successful. In any case, there is only limited and anecdotal evidence of increased workforce diversity, with the exception of age (most Skills for the Future trainees are younger than the existing workforce). As far as ethnicity, socio-economic background and disabilities are concerned, most projects seem to have limited their efforts to advertising the trainee positions on platforms more widely accessible.
- However, recruitment processes have changed as a result of the programme, with numerous reports of organisations moving their recruitment criteria from "experience" to "motivation". According to many accounts, the fact that Skills for the Future trainees were recruited mainly on motivation criteria and performed well in their placements has helped to convince organisations that they should adopt this change more widely in their recruitment.
- In terms of the ongoing capacity to deliver traineeships, some of the individuals involved developed their mentoring skills but this was mostly done informally. There is limited

evidence of formal training or accreditation of trainers and project managers, or of sustainable systems to capture the materials and experience developed through participating in the programme.

5.2 Assessing the quality of the evaluation reports

In terms of the quality of the evaluation reports, the lens through which this research examined the projects is valuable because it looked simultaneously at the project results as reported in the evaluation reports as well as at the structure and quality of those reports. The first finding is that there does not seem to be any correlation between the apparent quality of the project and the quality of the evaluation: a high-quality project delivered effectively and showing a number of positive sustained outcomes, does not necessarily make for a solid evaluation.

In our view, two points need to be emphasised in the future guidance to grantees with regard to their project evaluation: first, a final evaluation is not a final activity report. There seems to be confusion and a lack of agreed principles or standards as to what the evaluation report should look like. For example, several projects submitted a collection of trainee case studies. While relevant and interesting, these do not constitute an evaluation report. Second, evaluating a project requires a different skillset to project delivery.

It is hard to make a judgement on the impact of the improved guidelines for the second cohort of projects under review (2013 grants), as there were only three evaluation reports from this cohort available at the time of this research. However, these three reports achieved good scores in the review, with one being excellent, one good and one satisfactory. That said, we would advise that HLF provides the grantees with improved general guidelines. While it can be positive to give grantees a high margin of flexibility in the implementation of their evaluation, it would be helpful for HLF to specify a set of minimum requirements. This should include key project-level data which can then be compiled at the programme level (such as details of accreditations gained by the participants, employment outcomes, demographics of the population of trainees).

Overall, the meta evaluation found that too few evaluations met the standard that would be expected for an evaluation of projects of that size (22 evaluation reports or 46% of the total were not considered satisfactory overall, and only 4 were rated as excellent). Particular weaknesses in terms of methodology and reporting were observed with regard to:

- The description of the evaluation framework (which sets out the questions the evaluation is trying to answer) and methodology (which explains the activity undertaken to answer the questions and the data collected) was either missing or unsatisfactory in many cases.
- The methodologies used were not robust and objective enough in many cases, giving too much weight to the project manager's opinion for example (the best methodologies included consultations with external stakeholders and subsequent employers of the trainees).

- The completeness of the evaluation report. Notwithstanding the information reported to HLF through other channels before, during and after the project, the evaluation report should be understandable and sufficiently complete as a standalone document. This means offering a description of the project and its achievements, as well as annexing any relevant documents such as interim evaluation reports or other information.
- Little consideration was given in most evaluation reports to the efficiency or value for money of the projects. In fact, only 18 of the 48 reports even mentioned the value of the grant received by HLF. One project evaluator attempted to carry out a Social Return on Investment analysis, but this was based on just one case and was methodologically weak.

5.3 Recommendations

Based on the findings and conclusions presented above, we suggest the following recommendations to the current and future grantees, as well to HLF:

Guidance provided to the grantees should clarify the purpose of an evaluation and the basic requirements it should meet, using the checklist presented in this report's annexes.

While the guidance regarding evaluation has improved throughout the history of the programme, judging from the meta evaluation exercise carried out as part of this research, it is clear that there is still an insufficient understanding of the purpose of evaluation and how it should be carried out. In particular, evaluation has to be clearly distinguished from activity reports and from communication outputs. All three are necessary, but they are very different in nature.

It should also be stressed that evaluations should meet certain quality requirements with regard to design, implementation and reporting, and that the person or organisation responsible for carrying out the evaluation should have knowledge and experience of these requirements. The good practice examples highlighted in this report can be used by HLF and by the grantees for this purpose.

Channels that can be used to disseminate this information include the application guidance, but also other channels which have proven to be useful for the grantees, as highlighted in our survey, or could be useful if better updated.

Project evaluations should be critical and aimed at generating improvements.

The evaluation is an opportunity to reflect on the project and generate useful feedback and recommendations from improvement. This is best achieved from the position of someone who is in a position to be critical about the project – a difficult requirement to make of a project manager. This also means that the evaluations' design and methods should allow some space for the views and opinions of a range of stakeholders, including the partner organisations and the subsequent employer of Skills for the Future trainees for example.

Evaluation should be embedded in projects from their outset.

The end of the project is not the only time to carry out evaluation exercises. Evaluations are most useful when their recommendations can be used to improve the projects, which means the evaluations should be designed from the outset of the project, in such a way that it can generate ongoing improvements. This report contains useful examples of projects which implemented one or more interim evaluations before more trainees were recruited.

In this sense, it is appropriate for HLF to ask applicants how they plan to carry out evaluation, and to offer a specific budget for this component.

HLF should provide a set of standard reporting requirements in terms of the quantitative data it wishes to receive from projects.

This should include:

- number of applications for trainee positions received, number of positions available, and number of applicants selected;
- number of trainees hosted at the grantee organisation and at partner organisations;
- diversity data for both successful and unsuccessful applicants, as well as a description of any changes in recruitment processes;
- number of drop outs and replacements, and number of trainees who complete the training;
- number and details of accreditations received; detail of skills developed;
- employment outcomes (for example, permanent contract, temporary contract, self-employed, unemployed or inactive, in training and whether that is in the heritage sector or elsewhere);
- number of courses developed; hours of training received by trainers and supervisors;

Having this data readily available will make it easier to assess the extent to which the programme as a whole achieves its aims.

More efforts are required in terms of achieving and reporting workforce diversity.

The programme set out to bring more diversity to the grantee organisations and to the heritage sector. However, there is limited evidence from the project evaluations of the extent to which this aim was achieved, particularly in terms of ethnicity and socio-economic background. In part, this is due to the fact that the diversity objectives, targets and actual achievements are not reported consistently in the evaluation reports, and this should be improved in the future. But we also have reasons to think that a number of projects have not achieved what they expected in

this respect, and that it could be due to not having a comprehensive diversity strategy, beyond advertising placement opportunities more widely than before.

Annex one: Evaluation checklist

Current and future Skills for the Future grantees could use the following checklist to assess the quality of their evaluations and the design of their evaluations.

Planning

- ✓ The evaluation is planned and designed at the outset of the project
- ✓ The evaluation is embedded in the project to generate ongoing improvements

Design

- ✓ A robust evaluation framework is designed
- ✓ The evaluation framework sets out clear evaluation questions
- ✓ The evaluation questions are directly related to the aims of the programme
- ✓ The scope of the evaluation covers relevance, effectiveness, efficiency and sustainability

Implementation

- ✓ The evaluation is conducted by someone with the necessary impartiality
- ✓ The methodology is clearly described
- ✓ The methodology uses appropriate qualitative and quantitative data
- ✓ The methodology is robust (sufficient, unbiased and timely data collected)

Analysis and reporting

- ✓ The approach to analysis is clearly described and robust
- ✓ The analysis includes comparisons with the baseline
- ✓ The report contains an executive summary
- ✓ The report clearly presents the background and context of the project
- ✓ The report contains clear, useful and critical conclusions and recommendations
- ✓ The report includes visual tools
- ✓ The report is written to a high standard.

Annex Two: Online questionnaire for survey of grantee organisations

Introduction

Welcome to the online survey for the 2016 evaluation of the Skills for the Future Programme, and thank you very much for your participation.

This survey will help to provide recommendations on what makes a good Skills for the Future project evaluation and we really appreciate your support in sharing the lessons you have learnt through your own project evaluation.

Completing the survey should not take you more than 10 minutes and all responses will be anonymised in the reporting of the research.

If you have any questions about the research, please contact Kate Smith, our research manager, on 0113 290 4106 or at kate.smith@ecorys.com.

Survey

1. **To what extent were you involved in the development of the evaluation of your organisation’s Skills for the Future project? [compulsory question]**
 - a. Not at all involved
 - b. A little involved
 - c. Fairly involved
 - d. Very involved

2. **Did you (or anyone from your organisation) discuss the development of your evaluation at any point with HLF officers? [compulsory question]**
 - a. Yes
 - b. No

3. **How useful would you describe the guidance provided by HLF for designing and implementing your project evaluation? [Compulsory – one answer for each type of guidance]**

Type of guidance	Not at all useful	Not very useful	Somewhat useful	Very useful	Unaware of this guidance	Don't know
Skills for the Future application guidance						
HLF evaluation good practice						

Type of guidance	Not at all useful	Not very useful	Somewhat useful	Very useful	Unaware of this guidance	Don't know
guidance (2012)						
Skills for the Future project manager meetings						
Advice of grants officer or mentor						
Online HLF forum						

4. Did your project have a specific budget for evaluation work? [Compulsory – one answer]

- a. Yes – the evaluation budget was part of HLF’s grant
- b. Yes – the evaluation budget came from our organisation’s own funds
- c. Yes – the evaluation budget was a mixture of the HLF grant and our own funds
- d. No

5. Can you tell us how much you spent on your evaluation work, including staff time? [Compulsory – one answer]

- a. Free text response

- b. Don't know

6. Who conducted your evaluation work? [compulsory question]

- a. Internal staff
- b. External evaluator
- c. Other, please specify: (free text box, 500 word limit)

7. Would you say that the evaluation... [Compulsory – one answer per line]

	a. Not at all	b. Very little	c. A little	d. A lot	e. Don't know
Helped to improve your Skills for the Future project during its delivery?					
Helped or will help to improve your organisation's planning and delivery of future projects?					

	a. Not at all	b. Very little	c. A little	d. A lot	e. Don't know
Generated findings which are useful for other organisations/ the heritage sector?					

8. How useful did you find the process of evaluating your Skills for the Future project? [Compulsory – one answer]

- a. Not useful at all
- b. A little useful
- c. Useful
- d. Very useful
- e. Don't know

9. Please tell us more about your responses at question 8. What made your evaluation useful or otherwise, both to your organisation and other stakeholders? [Not compulsory – open text – 500 words limit]

10. With hindsight, is there anything you do would do differently in terms of evaluating your project? [Compulsory – one answer]

- a. Yes
- b. No
- c. Don't know

11. If yes at Q10, which of the following options best describes what you would do differently? [Compulsory – multiple answers possible]

- a. Start the evaluation process earlier in the project
- b. Contract an external evaluator
- c. Allocate more time and/or budget for the evaluation work
- d. Design different tools to capture the outcomes of the project
- e. Focus more on the wider impacts of the project
- f. Design more interactive tools to share the results of the evaluation, such as videos.
- g. Ask advice/learn from other Skills for the Future projects
- h. Seek more guidance from HLF
- i. Other, please specify: (free text box, 500 word limit)

12. Conducting an evaluation of your Skills for the Future project was a condition of the grant, set by HLF. Is this were not the case, would you still have evaluated the project?

- a. Yes
- b. No
- c. Don't know

13. Could you tell us more about your response at question 12? **[Not compulsory, free text box]**

14. Is your evaluation report available in the public domain?

- a. Yes **[if yes, will be prompted to state where via a free text box]**
- b. No
- c. Don't know

15. Did you actively share the results of the evaluation with any of the following stakeholders? **[Compulsory – multiple answers possible]**

- a. People involved in the project
- b. People in your organisation who were not involved in the project
- c. People from outside your organisation
- d. No
- e. Don't know

16. **[Only if select a/b/c in Q15]** Which materials/tools did you use for sharing your evaluation? **[Compulsory – multiple answers possible]**

- a. The evaluation report
- b. A summary of the evaluation report
- c. Visual tools (presentations, videos, etc.)
- d. Other, please specify: (free text box, 500 word limit)
- f. Don't know

17. **[Only if select a/b/c in Q15]** Which communication channels did you use for sharing your evaluation? **[Compulsory – multiple answers possible]**

- e. Email
- f. Meetings, workshops and events
- g. Website
- h. Social networks (Linkedin, Facebook, Twitter, Instagram)
- i. Other (please specify): (free text box, 500 word limit)
- g. Don't know

18. **[Only if select a/b/c in Q15]** Did you use different materials / tools and communication channels for different audiences? If so, could you tell us more about that? **[Not compulsory – open text – 500 words limit]**

19. Is there anything (good or bad) you would like to share anonymously regarding the evaluation of Skills for the Future projects and your evaluation experience? **[Not compulsory – open text – 1000 words limit]**

Finally, in order for us to better analyse your responses, please tell us some details about your organisation and your Skills for the Future project. All responses will be anonymised following the analysis, and we will not link answers and opinions to specific people and organisations in our reporting.

20. Which Skills for the Future project are you from? **[Compulsory – open text response]**

21. What was the approximate value of the HLF Skills for the Future grant your organisation received? **[Compulsory – open text response]**

22. Which of the following heritage subsectors does your organisation best sit within? **[Compulsory – one answer]**

- a. Cultures and memories
- b. Historic buildings
- c. Industrial, maritime and transport
- d. Land and biodiversity
- e. Museums, libraries and archives
- f. Cross sector

You have now reached the end of the survey. Many thanks for your participation!

Annex Three: Evaluation Frameworks

Categories of assessment for each evaluation report in the synthesis evaluation

Overarching Category	Subcategory	To include:
Project information	Cohort	-
-	Location	-
-	Heritage sector	-
Needs	Skills shortages identified	Conservation / sustainability
-	-	Widening access (public engagement, digital technology)
-	-	Other
-	Low capacity to develop vocational training	-
-	Lack of diversity in the workforce identified (target vs actual figures)	Gender
-	-	Lower socio-economic background
-	-	Ethnicity
-	-	Disability
-	-	Age
-	-	Other
Inputs	Grant value from HLF	Grant value acknowledged in report
-	Partnership funding achieved	Cash
-	-	Volunteer time
-	-	Non-cash contributions
-	Inputs leveraged from other sources	-
-	Number of staff allocated to the project	New staff recruited
-	-	Staff seconded
-	-	Full time equivalent
Activities	Number of traineeships available	-
-	Number of trainees recruited	-
-	Duration of traineeship (months)	-
-	Training activities developed for trainees	On-the job training
-	-	Classroom based
-	Support for trainers	Training for the trainers
-	-	Other support
-	Partnerships	Number of organisations who benefitted from a trainee placement
-	-	-
-	-	Number of new partnerships
Outputs	Number of trainees completing their placement	-
-	Number of accreditations achieved by trainees	-
-	Qualifications developed as part of the project	-
-	Qualifications which were new for the grantee organisation	-
-	Changes in recruitment processes	-
-	Other	-
Outcomes and impacts -	Number of trainees who secured a job	In the heritage sector

Overarching Category	Subcategory	To include:
Trainees		
-	-	In other sectors
-	-	Total
-	-	Undertaking further training / study in heritage related fields
-	Skills developed by trainees	Conservation / sustainability
-	-	Widening access (public engagement / digital technology)
-	-	Other skills and outcomes
Outcomes and impacts – Trainers and paid staff	Qualifications achieved by trainers	-
-	Skills developed by trainers	-
Outcomes and impacts – change in grantee organisations	Changes in recruitment processes	As part of the project
-	-	Not explicitly as part of the project
-	Capacity to develop and deliver vocational training	-
-	Difference made by partnerships	-
-	Other	-
Outcomes and impacts – change in heritage sector and / or society	Evidence of skills shortage addressed	-
-	Sharing of good practice with heritage organisations and professionals	-
-	Other outcomes for the sector and wider society	-
Lessons learned	Trainers	-
-	Training	-
-	Ancillary skills	-
-	Social media	-
-	Follow-up	-
-	Management	-
-	Recruitment	-
-	Organisation	-
-	Partner organisations	-
-	Professional memberships	-
-	Training duration	-
-	Mentoring	-
-	Training bursary	-
-	Qualifications	-
-	Sustainability	-
-	Internal communication	-
-	Evaluation	-
-	Budget	-
-	Skills	-
-	Other	-

Categories of assessment for each evaluation report in the meta evaluation

Category	Criteria
Planning	Evaluation budget
-	The evaluation was planned and designed at the outset of the project
-	The evaluation was embedded in the project to generate ongoing improvements
-	-
Design	A robust evaluation framework was designed
-	The evaluation framework sets out clear evaluation questions
-	The evaluation questions are relevant to the aims of the programme
-	The scope of the evaluation covers relevance, effectiveness, efficiency and sustainability
Implementation	Was the evaluation conducted internally or externally?
-	The methodology is clearly described
-	The methodology uses appropriate qualitative and quantitative data
-	The methodology is robust (sufficient, unbiased and timely data collected)
Analysis and reporting	The approach to analysis is clearly described and robust
-	The analysis includes comparisons with the baseline
-	The report contains an executive summary
-	The report clearly presents the background and context of the project
-	The report contains clear, useful and critical conclusions and recommendations
-	The report includes visual tools
-	The report is written to a high standard