



HLF Landscape Partnerships Programme
Guidance on Monitoring and Evaluation
July 2010

Introduction

This document has been written to help those involved with Landscape Partnerships to demonstrate what they are achieving. It will help:

- New partnerships who are working up their First Round submission. As you think about what you want to achieve through your scheme, you should also be thinking about how you will be able to prove the value of what you do to those who fund your work and to everyone who will be involved.
- Schemes which have been awarded a First Round pass and are now working on their Second round submission, including their Landscape Conservation Action Plan (LCAP). It is essential that an LCAP spells out how you will monitor and evaluate your projects. It is particularly important that you think about collecting 'base-line' data as early as possible.
- Established Landscape Partnerships which have been awarded a Stage two pass. The challenge now is to ensure you capture the longer-term outcomes of your work. At the end of your scheme you will need to produce a final evaluation report which should be of value not only to HLF but also to others who have supported or been involved in your work.

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The agreed approach

Landscape Partnership representatives who attended an evaluation workshop in February 2010 reviewed the proposal that partnerships should take the lead in monitoring and evaluation, rather than HLF commissioning an external evaluation. The feeling of the meeting was that evaluation led by the partnership teams would be of direct benefit to the partnership as a whole, and to its member organisations, as well as to HLF and others who have provided funding or other resources. Another benefit of partnership-led evaluation is that it can be embedded into all aspects of landscape partnership work, minimising additional bureaucracy. The intention is that evaluation should help focus activities and act as an additional motivator.

Partnerships need carefully to plan how they will make a robust assessment of both short and long term benefits schemes deliver to their local areas. Collecting data and making sense of it is only part of the evaluation process. You will also need to work out what you really need to know, present your results in a way which makes sense to your audiences, and plan how you will share your findings with partners and other stake-holders.

HLF is providing a free advice and support service to help with this process. London University's Centre for European Protected Area Research (CEPAR, part of Birkbeck's Institute of Environment), together with the Countryside Training Partnership (CTP), have produced this guidance and will be providing further support to help partnerships with their evaluation work. We are setting up a support website, offering advice over the telephone and by e-mail, and will be taking part in a number of landscape partnership workshops. The people involved are Richard Clarke, David Mount and Marija Anteric. Contact details are provided at the end of this document.

Why do we need specific guidance for Landscape partnerships?

HLF produces generic evaluation guidance¹ which is well worth looking at. This guidance however is addressed specifically at those involved with landscape partnerships.

What's special about landscape partnerships?

Landscape partnerships:

- Are the only HLF grant programme specifically focused on the countryside.
- Comprise a number of separate projects which are delivered over a wide geographical area.
- Aim actively to engage with local communities, and to help people develop an enthusiasm for the subtleties of their own local landscapes
- Address conservation of both the built and the natural heritage as well as meeting the needs of local communities and visitors.
- Must also seek to address social, environmental and economic priorities for the area.
- Are delivered through a partnership of bodies, normally including statutory agencies, local authorities, NGOs and community / voluntary organisations.

¹ *Evaluating your HLF project* (Apr. 2008), applies to all larger (>£50,000) grant schemes including Landscape Partnerships

<http://www.hlf.org.uk/HowToApply/furtherresources/Pages/EvaluatingyourHLFproject.aspx>

and

First Steps in Evaluation (Feb. 2009) aimed at smaller projects (<£50,000).

<http://www.hlf.org.uk/HowToApply/furtherresources/Pages/Firststepsinevaluation.aspx>

What needs to be done and how we can help

Stage	What you need to do	How we can help
Thinking of making an application	As you develop your thinking in terms of projects and the sort of activities (and outputs) that these will involve, you should also focus on the needs of your chosen area and how your scheme can deliver longer term benefits	Our guidance will help you think about how outcomes can be demonstrated. These should be highlighted in your application to HLF.
First round application granted		
Development Phase	Collect baseline data relevant to each of the four landscape partnership programme areas	We can advise on the types of baseline data that you might collect, and on data that might be available from other bodies.
	As you work up the detail for each of your projects you need to identify realistic output targets and also think about ways in which the outcomes of each project might be demonstrated	We can help you identify the kinds of outcomes you might expect from your projects and the evaluation methods you might use.
	Evaluation must be a central part of your LCAP. You could include an 'Evaluation Plan' chapter, and / or you might integrate evaluation methods into your project tables (see below, page 9)	We can advise on how evaluation can best be addressed within the LCAP. As a minimum it's probably worth talking to us at an early stage, and again when the LCAP starts to take shape.
	You must submit GIS boundary (shape) files with your LCAP	We can advise if necessary on GIS shape file formats. You should copy your shape files to us with your final LCAP at the same time that you send these to your regional HLF case officer
Second round submission successful		
Delivery Phase	You need to make sure that output data is recorded for each project.	We will be collecting this output data from delivery phase LP schemes in January 2011. We are happy to explain what is needed and why (see below, page 4)
	You need to make sure that evaluation information is collected as appropriate with each project. This could include data to compare with the baseline data collected in the development phase.	We can advise on how you can get the best evidence, and – if you are putting this work out to a third party – can comment on draft specifications etc. We will be asking for a report on this evaluation information at the same time as we collect output data.
	You need to commission / put together a final Evaluation Report for HLF.	We can advise on the evaluation elements of your final report, and comment on your plans for end-of-scheme evaluation work.
Scheme completed, final evaluation report submitted to HLF		
Post scheme	Consider ongoing review of the long-term impact of the landscape partnership	HLF will always be interested to learn about ways in which their programmes have led on to further activity or impact.

Some basic principles and definitions

Monitoring and Evaluation

Monitoring is the process of gathering information about your project as you go along. It is a neutral, non judgemental process, but to be of greatest value must be carried out in a systematic, planned way over the whole of the project lifespan. Monitoring will focus on activities and their outputs (see below). Monitoring reports help ensure projects are proceeding according to plan and that money is being properly spent.

Evaluation is the process of reviewing the information you have collected so you can check progress against your planned outcomes. In landscape partnership work this will often relate to the enduring benefits that have been achieved. Evaluation can also usefully re-examine the goals which have been set – questioning whether the right targets were set.

While monitoring is ongoing, evaluation is most often carried out at the end of a project. HLF asks for an end-of-scheme evaluation report that *‘compiles quantitative and qualitative evidence to tell the story of your project and which makes a comparison with the aspirations first laid out in your application’*. HLF withholds 10% of all grant monies from funded projects until an acceptable evaluation report is received. Although the evaluation report is not required until the end of a project, it does need to be planned well in advance, particularly where baseline data will be needed in order to compare the ‘before’ and ‘after’ of HLF funding.

Project sequence

Projects can be viewed in terms of their inputs, activities, outputs, outcomes and impacts. It’s very important to be clear about what we mean by these terms.

Inputs can include time, money, staff and facilities. Also less tangible human assets such as commitment, enthusiasm and a shared vision.

Activities and **outputs** are usually directly linked to each other. These can usually be quantified – things such as the number of volunteer days, hours of training delivered, metres of wall rebuilt, area of habitat restored, or numbers of individuals involved in an activity. They arise from the objectives of a project, often expressed as targets.

Outcomes and **impacts** are the longer-term benefits of what you do. These might be measured in terms of the effects your work has on an area or the people who live there. They relate to the overall aims of a project and they can often only be captured qualitatively.

Quantitative and qualitative measures

Often the things we are most interested in achieving – for example a change in the way people think about their local environment – are the hardest to measure. To get the fullest idea of project achievements it will usually be necessary to collect a balance of qualitative as well as quantitative evidence.

Indicators

It is rarely possible truly to measure the full impact of any activity, whether these intended or not. To overcome this problem, the usual approach is to identify measurable indicators and use these as a proxy for measuring total impact. Selection of indicators is a critical part of the process. Good indicators will be:

- Relevant to stake-holders and their interests.
- Expressed in terms that the interested public can understand and relate to.
- Selected where possible so that they use data which is already being collected as part of another process. In any event the costs of data collection not should be disproportionate relative to the scale of the project.
- Capable of replication to show trends and change over time and also to bench-mark different projects against one another.
- Applicable at a range of scales in order that data can be combined or split down to a project / county / regional / national level
- Complementary to, or integrated with, other indicators, (e.g. Best Value Performance Indicators used by local government).

Often it will be hard to meet all of these criteria. The things that are easy to measure often provide only a superficial picture; the things that really matter may to an extent not be wholly measurable.

The problem with outcome indicators is summed up neatly by the poster which Einstein is said to have had in his room at Princeton University:

“Not everything can be counted, and not everything that can be counted counts”.

Measuring success: outputs and outcomes for landscape partnerships

Outputs are the direct result of the activities you undertake. Outcomes are the (usually longer-term) consequences of this activity in terms of the landscape heritage of an area and the communities and individuals who use or value them. The table below provides some examples relevant to landscape partnerships:

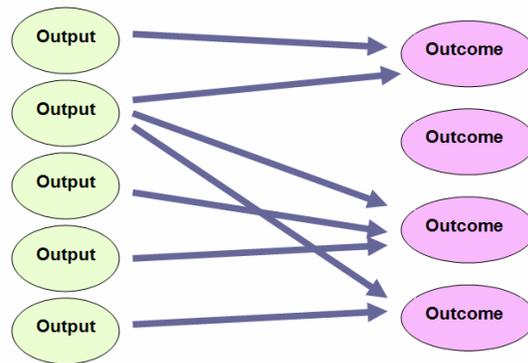
	Outputs	Outcomes
<i>Community participation</i>	Numbers of volunteer days No. of youth groups who have worked with the scheme No. of events held No. of residents engaged No. / size of new local groups	Ongoing activity of local groups or individuals might be an important outcome. This could result in voluntary maintenance of built and natural features beyond the end of funding. It might also be reflected in the way people perceive and care about their local area
<i>Access to and learning</i>	Length of footpaths or nature trails created No. of interpretation boards installed % of users looking at the boards; average “dwell time” No. of leaflets distributed No. of guided walks or talks / no. of people attending. Press releases issued, appearances on local radio	Longer term visitor numbers Perceptions and understanding Local pride and interest in the immediate landscape Increased use of the area by educational or community groups Ongoing media interest in local landscape issues
<i>Built and natural features</i>	Hectares of heathland restored / brought back into favourable condition Length of dry stone wall made stock-proof Length of hedgerow laid No. and size of ponds created or dug out No. of scheduled monuments which have been conserved.	All the output examples on the left could also be outcomes if they last beyond the end of funding. The combined effect of all these outputs might also be expressed in terms of the way they contribute to a distinctive local landscape character.
<i>Training opportunities</i>	No. and duration of training events No. and level of qualifications awarded Nos. of volunteers trained/ work placements/ qualifications obtained.	Number of jobs created beyond the end of funding, progression to further qualifications to careers linked to heritage, heritage skills within the local population.

The whole is greater than the sum of the parts

While outputs are usually directly linked to activities, the relationship between outputs and outcomes often more complex.

For example, moorland restoration works (an output) can contribute to greater understanding amongst the volunteers involved, as well as increased biodiversity (two different outcomes).

A number of different outputs (e.g. number of volunteers, length of hedgerow laid, hectares of meadow grazed) can contribute to people's understanding of what landscape means (an outcome)



This is very important for Landscape partnerships, where the intention always is that the combined impact of projects will be greater than the sum of the parts. It's important to think creatively about the different ways your activities might contribute to a range of outcomes.

Output data

Periodically HLF asks all the landscape partnership schemes to produce a comprehensive set of 'output data' against a wide range of headings. As well as quantifying the outputs of the individual partnerships this enables us to demonstrate what HLF funding has achieved on a national scale.

The next round of output data collection is planned for January 2011. Further information about this will be circulated in the autumn of 2010. While HLF will be compiling information across several hundred data categories, experience suggests that only 30-40 of these will apply to any one landscape partnership. Partnerships will also be able to submit additional output data which doesn't fit into any of the existing data categories.

Landscape Partnership schemes which didn't return output data in February 2009 (usually because they were not in delivery phase at that time) need to think in advance about the outputs of their projects and how these relate to HLF's output data categories. New schemes are required to specify targets for the outputs they will report against, and these will also need to be entered into the proforma.

The landscape partnership evaluation website www.birkbeck.ac.uk/environment/lps provides further information about the data categories which were collected in 2009

Capturing enduring achievements – difficulties in demonstrating outcomes

Outcomes are the differences that your landscape partnership scheme has made to the area you are working in. Demonstrating outputs – especially where these are easy to quantify – can be a relatively straightforward task. Demonstrating outcomes is more difficult, for a number of reasons:

- Measuring differences involves ‘before’ and ‘after’ comparisons. These can only be made if you have some ‘baseline’ information that helps you to do this.
- It is often hard to attribute outcomes to particular activities or outputs. A programme of guided walks may have changed the way people view a particular landscape, but they may also have been influenced by programmes they have watched on television.

Suggestions

- Integrate evaluation into your planning from the outset
- Make sure monitoring is central to the delivery of all elements of your scheme, for example:
 - * Habitat restoration projects could include ecological surveys carried out by community groups. These could happen at the outset, when the work is completed, and then on a regular basis in the future.
 - * The repair or restoration of built heritage could involve people taking fixed-point ‘before’ and ‘after’ photographs.
 - * All kinds of events – be they cultural celebrations or training courses - should be designed so that there are opportunities for participants to provide feedback. This does not necessarily mean questionnaires – you can obtain feedback through a post-it activity at the end of the event, or by commissioning someone to ask people what they think of the activity they are taking part in.
 - * Projects working to improve access to the landscape could also include user surveys carried out by local residents or community groups

Monitoring and evaluation do not have to be separate to the rest of your work – the same activities can be used to increase participation or as a way of helping people learn about their heritage.

Maximise the value of your data:

- Wherever possible obtain contact details of participants and others who contribute to surveys so that you can conduct ‘follow-up’ work after the project ends (telephone number and e-mail are usually sufficient)
- Collect and record some basic personal information where this will not cause offence. It’s useful to know people’s age-group, sex, ethnicity, disabilities and their home post code. This all helps make sense of the data you collect.
- Write a clear account of the methodology adopted when collecting information. Provide information so that someone else could repeat the survey if those who did the original work have moved away or fallen underneath the Clapham omnibus. The sort of information you should record could include:
 - * For vegetation surveys: the precise location of the survey, when it was conducted, the type of quadrat, whether random or systematic, which species groups were recorded and which were not.

- * For fixed-point photography: where the photographs were taken from (GPS records are invaluable), the focal length of the lens, the time of year / time of day / weather conditions.
- * For participant or visitor surveys: full details of the project or event, how the survey was conducted (e.g. face-to-face or remotely, by interviewer or self-completion).
- Work out a way in which your survey results will be both safe and accessible. A distressingly large percentage of survey work gets 'lost' in people's computers. Make sure both you and anyone else will be able to find the results in future years. There is little point in collecting baseline data if you lose it.

Evaluation and the LCAP

The LCAP should explain how you plan to manage the monitoring and evaluation process overall. This will ultimately be the responsibility of the partnership steering group, who might choose to appoint a small independent group to act as a 'scrutiny committee'. For all but the smallest projects it may make sense to devolve M+E responsibility to individual project teams.

Explain how you will ensure the monitoring and evaluation system will develop as new projects come on stream, and as monitoring results start to come in. You should always be on the lookout for ways to demonstrate the full value of the work you are doing.

Your LCAP as a whole will need to show a balance across the four programme areas which have been set for landscape partnerships conservation of built and natural features; community participation; access and learning; and training and skills.

For each project the LCAP should:

1. Identify outputs and outcomes
2. Identify what sort of data you might collect in order to demonstrate what you are achieving. Where you select particular indicators you should explain why these have been selected and any reservations you have about their interpretation.
3. Specify how often you will collect data, the methods you will adopt and who will carry out the work.
4. Identify milestones along the path that demonstrate whether or not things are on course.
5. As part of your development work you should collect, where possible, baseline data. A summary of this baseline data could be presented in the LCAP (include survey reports etc. as supporting documents with your stage 2 submission).
6. It's likely you'll need to plan for further baseline work in year 1, in particular for streams of work which are planned for later years.

Monitoring and evaluation work will require resources, both in terms of (core staff) time and money. This should be allowed for as you work up scheme budget. M+E activities typically take up 2-3% of a project budget. If it looks as though you are spending more than 5% of your budget on this work you should check if this is really justifiable.

The LCAP should explain how you will share evaluation results within and beyond the partnership. One way would be through your website. When you get to this stage remember that for many 'evaluation' has a negative, judgemental feel about it. It may be better to express results in terms of 'what we have learnt' and 'what we have achieved'. Some completed schemes have produced attractive summary evaluation reports, reporting on what has been achieved while also congratulating those who have made it possible.

Sources of advice

Your HLF Case Officer is as always your first port of call for further advice and information, but both HLF staff and Landscape Partnership personnel will also be able to draw on the services of the landscape partnership evaluation support service (contact details below).

You should also visit the [Landscape Partnership Evaluation website](#). This contains further information on the topics addressed in this guidance and also contains links to selected good practice guidance which is available on the web².

The evaluation website is password protected; please contact us and we will be delighted to provide with details how to gain access.

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² One recommended starting point is the nef publication *Proving and Improving: A Quality and Impact Toolkit for Social Enterprise* www.proveandimprove.org