7 Monitoring & Evaluation

7.1 Introduction

This chapter lays out the framework for monitoring the work and evaluating the impact of the Elan Links scheme. During the development phase, consultants Resources for Change were contracted to produce a Monitoring and Evaluation Plan which has been used as the basis for this chapter and is available as appendix LCAP7.

Thorough monitoring and evaluation of the Elan Links scheme and its individual projects is required for three reasons:

- In order to ensure the scheme is measured in terms of its aspirations, outputs and to give an indication if they have been successful or not;

- In order to meet HLF's requirements as a funder, and the requirements of any other funders; and

- In order to inform and support good legacy planning by identifying future opportunities, projects and work.

In order to achieve the above Elan Links will implement a monitoring and evaluation package rely on a combination of work by Scheme staff, project partners and external evaluators. It is vital to embed monitoring and evaluation activities within day-to-day working, but also to include external, objective input at key points.

7.2 Evaluation Purpose

We will provide more detail on each of the three sections above:

The Partnership's intentions for the evaluation are that it will enable them to maintain an overview of the partnerships outcomes and impact, whilst guiding legacy during the course of the project:

Regular output monitoring (as required for HLF reporting) will inform the Scheme manager and partnership about:

- Projects implemented in line with targets, on time and budget.

- Find out whether the Scheme has done what it set out to do.

The information can then be used for internal Scheme management purposes and to report back as required to funders in order to pay against delivered outputs.

This element will form the regular monitoring (primarily quantitative) reporting carried out by each individual project and cumulatively accounted for to HLF.

The wider scheme evaluation will be more analytical and inform:

- Improve what the Scheme is doing and the way it is working.

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- Provide evidence about whether and how the Scheme has made a difference at a more holistic level – to the landscape, to nature, to people and communities.

- Consider aspect of partnership and wider engagement working.

- Show clear links and develop understanding of the links between activities, outputs, outcomes and impact.

- Inform legacy both of the HLF Scheme and more widely.

This element will be the more analytical element. It will be periodic and will be more holistic and qualitative.

Critical to this will be helping develop an understanding of how the Partnership is doing against the theory of change and questioning where it needs revising.

7.3   Evaluation Ethos

The Partnership understands that there are many different approaches to evaluation, and also much variation in the terminology used. They are keen to have a common understanding amongst partners, projects and staff, so have adopted the following definitions:

- **Evaluation** is the analysis of information in order to inform decision-making.

- **Monitoring** provides the information needed for that analysis to be done.

- **Impact** considers the wider effects of the Scheme in totality and how it has affected the bigger systems and context in which the project operates, towards delivering impacts as described in the Theory of Change.

- **Legacy** identifies the longer-term impacts of the Scheme's interventions and how they and or their impact will be sustained.

The evaluation will have the following features:

- It will be constructive - helping people to think about what could be done better the next time, recognising that things might not all work out quite as expected - and will have a 'human feel'.

- The design will build on monitoring techniques which project staff are already using where these are required for other purposes and where they are felt to be helpful.

- Project leads will understand what monitoring is essential for reporting to HLF as the main funder, and what additional monitoring they can choose to do.

- Monitoring will be generally be relatively easy to do and won't be time-consuming.

- It will follow a Theory of Change approach, i.e. activities – outputs – outcomes - impact.

- It will recognise the context of the work, helping to understand the other 'big events' that have an effect on what is achieved.
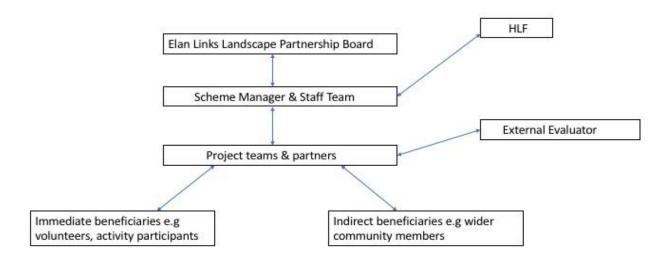
To achieve this, the Partnership will:

🌿 Commission an independent and impartial evaluator, who will bring in a different viewpoint, offer knowledge and ideas about technique, constructively challenge the staff and partners, and carry out information-gathering tasks that an 'insider' would be unable to do effectively.

🌿 Include an interim and a final evaluation exercise to be undertaken by the evaluator, using monitoring data collected by the Scheme and its projects, as well as information that the evaluator collects themselves.

🌿 Structure the evaluation around an agreed set of 'key topics', which will provide a framework and a focus for all monitoring and evaluation activities.

🌿 Work with the evaluator to develop a 'toolbox' of monitoring techniques and data collation tools relating directly to these 'key topics', to ensure that all Scheme monitoring can contribute effectively to evaluation analysis, and from which project leads and staff can choose which techniques to use.

🌿 Make use of the quantitative data collected and reported to HLF, but also use additional monitoring data collected by the Scheme staff and projects, with each project lead choosing monitoring techniques that they feel comfortable with, are suitable for their audiences, and at a level they can manage.

🌿 Equip the staff and project leads with responsibilities for monitoring and evaluation with the knowledge, skills and support to carry out these responsibilities.

🌿 Recognise the limitations of this evaluation to record those impacts which are likely to be felt after the end of the HLF funded period, and therefore this evaluation will seek to understand the extent to which intended impacts are being achieved so far.

🌿 Make the most of the interim evaluation to provide direction and a source of evidence to inform discussions about the Scheme's legacy and wider area legacy direction.

7.4   Evaluation Stakeholders

As a subset of the scheme as a whole, it is possible to map the stakeholders' specific to the evaluation:

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Evaluation stakeholders can further be considered in terms of the nature of their 'stake'. The table below presents an initial analysis created at the Landscape Partnership's evaluation planning workshop, which can be further developed and used as a 'live' reference during the lifetime of the Scheme.

Involved in running the evaluation & carrying out monitoring	Giving information	Interested in the results and learning
⚘ Scheme manager and team ⚘ Project leads and delivery staff ⚘ Partnership ⚘ Water company ⚘ Elan Valley Trust	⚘ Project leads ⚘ Volunteers ⚘ Visitors ⚘ Participants ⚘ Visitor centre staff ⚘ Event leaders ⚘ Tenants and land managers ⚘ Immediate community – residents ⚘ Partners ⚘ Staff team ⚘ Local businesses, including tourism ⚘ Birmingham target resident areas ⚘ Residents along the pipe route - target areas ⚘ Rhayader and other local resident populations.	Those people who have given information, plus: ⚘ HLF ⚘ Local communities ⚘ Decision makers – Councils, Government, Water company ⚘ Other interest groups – peers ⚘ Other Landscape Partnership Schemes ⚘ The projects that hadn't succeeded in becoming part of Elan Links

7.5   Key Topics

Key Topics and sub-topics describe what the evaluation as a whole will focus on, in order to meet its intended aims. The Key Topics will guide what information is gathered through ongoing monitoring and the evaluation intervention(s), and then used for the evaluation analysis.

The Key Topics relate to what benefits and impacts the Scheme brings about (achievements) for the ecology, heritage and people, and to the process of delivering the Scheme. They have been developed from the starting point of Landscape Partnership members and Project Leads thinking about what success will look like, both at a project and a Scheme level.

The HLF intended outcomes and their legacy are:

- Heritage will be – better managed, in better condition, identified/recorded

- People will have – developed skills, learnt about heritage, volunteered time

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

Overall, the Elan Links Partnership is keen that the evaluation considers the contribution of the Landscape Partnership Scheme towards the unique catchment management heritage, and the wider understanding of its relevance.

KEY TOPICS

Making a difference

- **Landscape and ecological heritage**
    - Improved habitats.
    - Improved habitat management, including relationship with wider land management practices.
    - Improved archaeological and built heritage recording, management and condition.
    - Improved access (direct and indirect).

- **Knowledge and understanding**
    - Amongst the target audiences including: partners; land managers; local residents; Birmingham residents;visitors to Elan Valley and nearby locations / settlements.
    - To cover understanding about a range of areas of intervention including: land management including traditional practices; species and habitats; landscape; cultural heritage; water sources and quality; the 'Elan story'; the concept of ecosystem services.

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- **Accessing the landscape**
  - Increased engagement with the Elan Valley landscape by the Scheme's target audiences, directly and indirectly
  - An improved visitor offer
  - New ways of engaging with and accessing the landscape (e.g. arts, traditional skills training)

- **Local feelings and relationships with Elan Valley**
  - Positive perceptions amongst local people towards the Elan Valley, including through economic relationships, pride, wellbeing, sense of connection, active involvement.
  - Benefits reported by local people and visitors, including physical, recreational and wellbeing benefits.

- **Heritage related economy, jobs and skills**
  - Local businesses perceiving economic benefit, including increased level of business, new markets, skills development and related income generation.
  - Individuals perceiving economic benefit, including skills development from training and volunteering, new income generating opportunities (e.g. self-employment contracts, job), personal development (e.g. self-confidence, personal networks).
  - A stronger visitor economy, including more visitors, visitors staying longer, more profile for the area.

Improving what the Scheme is doing

- Provision of activities;
- Providing fun, enjoyable, inspirational activities;
- Working in an enabling and empowering manner;
- Sharing skills and knowledge;
- Partnership working;
- Creating a partnership of organisations that work together effectively and feel connected to the catchment and its heritage;
- Engagement and relationships;
- Effective connections, working relationships and engagement between the partnership, the Scheme's target audiences and the public;
- Legacy;
- Developing strategies for the future, including maintenance and capacity to deliver long after the HLF funding;
- Building partner organisations' skills for reaching out to new audiences; and
- Moving towards sustainable volunteering approaches.

7.6   Identifying Success

Landscape Partnership members have considered what things would be like both at project and Scheme levels, if the Scheme is successful. Their thinking is shown in the table below, presented in terms of success for the physical environment and heritage, and for people and communities. The exercise that generated the content here was done at a Landscape Partnership workshop and added to afterwards. It is intended as an indication of what Landscape Partnership members anticipate things will be like if the overall Scheme and projects individually are successful, and has been the basis from which the evaluation's Key Topics have been created, as well as contributing to the development of the Theory of Change.

Success for the physical environment & heritage	Success for people & communities
SCHEME	
- Real improvement to the area - Increased awareness of Elan: - Landscape - Flora and fauna - Water quality - Cultural heritage - Improvement to landscape - Diversification opportunities for farming communities - Improvement to redundant buildings & access to them - Rare species conserved & their habitats - Traditional practices to contribute, enhance & promote habitat management - Improved habitats for wildlife	- Tourism economy thriving as a knock-on effect - Accommodation providers within a 5 mile radius are promoting and connecting to Elan in some way - That they are passing on information to visitors – are less passive in their engagement - Elan v Rhayader issues resolved - Perceptions & communication - People staying longer and spending more - The project was developed to deliver the vision & the right people benefited - Develop long-term partnership approach beyond the life of the project - Partners remained engaged through the project and beyond – resolving differences as they go. - Increased number of visitors - Improvement to the skills and aspirations of locals - Economic opportunities created, farming etc. - Improvement to health & well-being of local people & people from Birmingham - Strong partnership with future opportunities - Increased understanding of where

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Success for the physical environment & heritage	Success for people & communities
	communities water comes from in Birmingham and along the pipeline
	That the vision for change/development is still there
	Measurable changes to people are positive
	Perception in the community, overall, is positive
	Partnership is in place and developing new work
	Projects that are ongoing/developing that have come from the HLF project
	Far greater awareness of what collaborative working can do – and are aware of how they can contribute to organisations or self-organise
	Lines of information sharing are clear and used by a wide range of people
	Increased number of visitors
	Well-managed visitors
	Vibrant local economy
	Raised profile in the wider community, UK & beyond
	A happy local community
	Increase in people to the area
	Financial stability
	Change in perception /attitude /understanding of
	area/project
	Providing accessible history on the heritage of the estate
	Are people participating in the schemes? Interim monitoring (IMPACT - process)

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Following on from this the same approach was taken with the individual objectives and associated projects.

PROJECTS		
Objectives and Projects	**Success for the physical environment & heritage**	**Success for people & communities**
Objective 1 Projects 1a – Better Bogs, 1b Elan's Dry Heath & 1c Elan's Woodlands	⚘ Improvement to habitats with a better understanding of what has worked/not worked and what to develop/continue to do in future.	⚘ Landmanagers have engaged and learned from the scheme ⚘ Improved skills ⚘ Improved activities & participation ⚘ Interest from Welsh Assembly Government and others about project
Objective 2 Projects 2a - Elan's Rare Birds 2b – Identifying Elan's Rare Species	⚘ Improved habitat for at risk birds ⚘ Information about the habitats and other rare species collected	⚘ Landmanagers have engaged and learned from the scheme ⚘ Improved activities & participation ⚘ Improved skills
Objective 3 Projects 3a – 3e	⚘ The re-introduction of traditional farm practices and their contribution to habitat management ⚘ Stronger Elan Sheep breed	⚘ Landmanagers have engaged and learned from the scheme ⚘ Improved skills ⚘ Elan wether meet sold locally
Objective 4	⚘ Conclusive information on Elan's built and ancient heritage ⚘ Those most at risk safeguarded	⚘ Getting people to appreciate the sites of relevance i.e. boundary stones/Bronze age features – allowing access to area ⚘ Improved activities & participation
Objective 5 Projects 5a, 5b & 5c	⚘ Currently at risk sites and buildings are renovated and safeguarded ⚘ Work is completed on time & budget ⚘ Fills a gap in present accommodation available at Elan ⚘ Supports EVT's charitable objectives	⚘ Providing accessible history on the heritage of the estate ⚘ Regularly used & self-sustaining ⚘ Advertised appropriately, available as needed by groups and artists ⚘ User feedback is positive ⚘ Retreats for "harder to reach" supported

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Objectives and Projects	Success for the physical environment & heritage	Success for people & communities
Objective 6	• All partners signed up to archiving policy and heritage safeguarded as a result • Better archive of Elan's heritage/people's collections – central resource • Information supports the implementation of projects 3a-e	• People aware and making use of the archive • People engaged and learning from Elan's cultural heritage • People more aware and supportive of the Elan Links Scheme • Volunteers trained
Objective 7 Projects 7a, 7b, 7c & 7d	• The creative industries are strengthened locally • The creative economy is strengthened • Profile of Elan's heritage is raised	• Elan app projects – increased understanding of the benefits of Elan valley to Birmingham & to water. • A cultural centre of excellence is created and is self-sustaining • Locals and visitors benefit emotionally and are changed personally from arts & heritage work • New groups (informal/formal) are established and self-supporting • New partnerships are made and work together going forward • It is obvious how you can engage with the projects
Objective 8	• Profile of Elan's heritage is raised	• More people engaged with and learning about Elan's heritage • Project volunteers engaged and supported
Objective 9	• Elan's Access Plan supported by all relevant partners • Routes are accessible and visible	• More areas of Elan are accessed • Users feel a sense of 'place attachment' • Families are more confident to explore • Health & well-being positive + • Increased use by target user groups • A more open forum is achieved & sensitivities brought to light early
Objective 10	• Improvement to habitats • Improvement to estate infrastructure such as paths	• Providing accessible history on the heritage of the estate. • Improved confidence for local people

	etc ⚘ Previously inaccessible areas made accessible	⚘ Improved skills ⚘ Well-being of harder to reach individuals from Birmingham improved ⚘ Number of people going into employment/further training ⚘ Number of disadvantaged groups engaged with natural environment ⚘ Improvement work to estate such as benches, bridges, fences, picnic benches ⚘ Number of freelance tutors gaining employment ⚘ Natural heritage crafts – more engaging ⚘ More people engaging with natural environment and learning how to care for it ⚘ Number of people engaging with local community as a result of project ⚘ Number of people more able to take on responsibility ⚘ Number of people taking steps to get a job ⚘ Number of people rating their experience from good to brilliant
Objective 11	⚘ Number of Birmingham residents and school children having a greater appreciation of where their water comes from and water quality which will foster a greater appreciation for people to safeguard and care for Elan in the future	⚘ Number of Birmingham school children having a greater appreciation of where their water comes from and water quality. ⚘ Number of Birmingham residents having a greater appreciation of where their water comes from and water quality. ⚘ Network of Birmingham partners established ⚘ Cloud to Tap Water Festival established ⚘ Elan - Birmingham Civic connection restored and number of activities as a result

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7.7 Elan Links Theory of Change

Elan Links project provides...

- Training
- Information & interpretation
- Networking & peer support
- Funding
- Advice
- Restoration
- New Opportunities

With the result that...

Elan's natural, built and cultural hertiage is better identified & recorded.

The heritage is restored and brought into effective management.

More people are aware of and understand Elan's heritage, the complexities of manageing its land, and Elan's 'story'.

There is a better 'offer' for visitors, and more opportunity for visitor businesses.

More people are equipped with skills to manage heritage.

And ultimately...

Elan's heritage is more effectively managed.

There is a strong core of organisations and people committed to Elan's future as a special place, and able to work towards this.

Local economy more resilient.

Elan has a profile as a special destination for visitors seeking rural beauty and tranquility, and is equipped to meet demand.

Encourage a vibrant community for those tht live and work in the area.

7.8 Implementation

7.8.1 Overview

The monitoring and evaluation comprises a mix of ongoing output monitoring, periodic wider outcome monitoring and distinct evaluation interventions at mid-term and final points which can also start to consider impact.

Legacy which will form a regular item of all Partnership meetings and be a specific focus of the mid-term evaluation:

Regular monitoring	This forms the regular project and programme output monitoring to HLF.
Periodic monitoring	Carried out by the Scheme and its partners in order to provide data relating to the intended Scheme outcomes, additional to the monitoring required by HLF, and to be carried out at the discretion of Scheme and project staff (to match their available capacity and skills). We anticipate using a small number of timely interventions including:

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	🏃 Bi-annual survey of local businesses in Rhayader; 🏃 Surveys at the museum in Rhayader& Visitor Centre at Elan Valley; 🏃 Visitor Centre records; 🏃 Access path counters (partners' and Scheme's); 🏃 Activity and event participant surveys; and 🏃 App and Website analytics. Plus existing forums where more general qualitative feedback can be requested, including: 🏃 Annual tenants forum 🏃 Partnership Board meetings
Annual self-evaluation	Partnership-led reflection on overall progress against Theory of Change, drawing on both output monitoring and periodic monitoring being carried out by the Partners. To be carried out as an internally facilitated agenda item at a Partnership meeting.
This will be supported by two more in-depth evaluations drawing on all available material, led by the external evaluator.	
Interim evaluation	Check on progress, legacy planning, and feedback to the community:
	Are we heading in the right direction?
	Are we beginning to have an impact? Is it the impact we're aiming for?
	Are we doing it right?
	What can we learn from our work so far to help us plan for the future, after the end of this HLF funding?
Final evaluation	Impact, legacy consolidation, and feedback to the community and funders:
	What difference have we made? Has this been the best way to achieve these outcomes?
	What will sustain after the end of the funded project?

The **Scheme Manager will have lead responsibility for monitoring and evaluation**, with input from project staff, Partners, fund beneficiaries and others as appropriate.

Who?	What?	When?
Scheme Manager	Operational responsibility for evaluation initiation and delivery.	Ongoing.
	Operational responsibility for monitoring activities.	Quarterly. Mid-term and final evaluations.

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Who?	What?	When?
	Monitoring collation and analysis. Active participation in evaluation information gathering, analysis & recommendations.	
Scheme staff and wider Project teams	Support to Scheme Manager for monitoring and evaluation delivery. Regular collection of monitoring data. Active participation in evaluation information gathering, analysis	Ongoing.
Admin officer	Collation of monitoring data.	As per monitoring schedule.
Project leads/partners	Regular collection of monitoring data	Ongoing
	Active contribution to evaluation information collection.	Mid-term and final evaluations.
External evaluator	Delivery of interim and final evaluations.	Mid-term and final evaluations
	Mentoring support.	Ongoing

7.8.2   Summary of Evaluation Activities

Full plans for the two evaluations (mid-term and final) will be finalised and prepared in detail immediately prior to each evaluation. These evaluations will be carried out by the independent external evaluator, with support from the Scheme Manager, other Scheme staff and partners.

At this stage, there are outline plans, comprising the following potential key information-gathering activities in each evaluation:

- Review of monitoring data (collected and collated by Scheme and partners);
    - Outputs data;
    - Volunteer numbers and hours;
    - Activity/event participant numbers ;
    - Volunteer and participant satisfaction surveys;
    - Volunteer and participant case studies;
    - Visitor surveys;
    - Business surveys; and
    - Ad hoc feedback.

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- Scheme staff and project partner in-depth semi-structured interviews;
- Participant, volunteer and trainee information-gathering – sample:
    - Short semi-structured interviews;
    - Case study in-depth semi-structured interviews – volunteers, trainees; and
    - Online survey – all volunteers, registered participants.
- Target audiences information-gathering – sample:
    - Local residents' surveys, e.g. pop-up participatory stall, online survey via social media;
    - Local businesses surveys, e.g. short phone interviews, online survey; and
    - Birmingham residents who have participated in Scheme activities, e.g. short phone interviews, online survey.

7.8.3 Reporting & Dissemination

For the mid-term and final evaluations, the external evaluator will be responsible for compiling a full report. The structure of this will be confirmed at the start of each evaluation, but is likely to include:

- Executive summary
- Introduction
    - To the Scheme and constituent projects
    - To the evaluation
- Findings, by key topic
- Analysis, by key topic and HLF outcome
- Recommendations
- Appendices, e.g. contributors to the evaluation, data summaries.

It will be important to close the evaluation 'feedback loop' by disseminating the learning that is drawn out. The different audiences for this mean that a variety of ways will be used, in order to provide the information in a suitable format and level of detail for each key audience. Ideas for methods include:

- 'Easy read' summary of evaluations, including images, in a format suitable for upload to the Elan Linkswebsite, sending via email or printing.
- Electronic presentation, with speaker notes.
- Articles suitable for partner organisation and other specialist organisation newsletters and websites.
- Key messages card, providing Scheme and partner staff with key points to pass on during informal conversations.

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7.9   Measuring Success

7.9.1   Measuring key topics

The next step is to describe how the Key Topics and indicators of success will be measured, through both ongoing monitoring and one-off evaluation information-gathering exercises. This table provides a summary, covering the activities, outputs and outcomes of all the Scheme projects within the framework of the Key Topics listing.

GREEN TEXT – monitoring activities which are the responsibility of the LPS

BLUE TEXT – evaluation activities which are the responsibility of the external evaluator.

Please also refer to each Detailed Project Plan documents, which provide more detail about monitoring specifics to that project.

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What	How	When	Who
HLF intended outcomes:			
Heritage will be – better managed, in better condition, identified/recorded			
Improved habitat condition	Ecological monitoring biodiversity surveys. Specific Key indicators measured for each target habitat Photographic recording Project completion reports with evidence	Yearly biodiversity monitoring Yearly photographic evidence Yearly reports to Natural Heritage Sub Committee Some additional monitoring activity will be tailored to meet the needs the monitoring subject.	Scheme & Project staff & Partnership partners
Improved archaeological heritage condition	New Surveying. Updates to Heritage at Risk Database. Project completion reports with evidence.	Year 1 of the delivery period Yearly review of at risk database When project activity is completed Some additional monitoring activity will be tailored to meet the needs the monitoring subject.	Scheme & Project staff Consultants appointed to implement the project
Improved built heritage condition	Photographic recording. Project completion reports with evidence undertaken. App usage at new sites. Building maintenance checks	At end of project activity Yearly	Scheme & Project staff
Improved habitat management	Ecological monitoring biodiversity surveys Photographic recording. Data	As appropriate to conditions of management agreements.	Scheme & Project staff & Partnership partners

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What	How	When	Who
	collection – management agreements, small grants, farmer groups active. Stakeholder feedback. Reports to Natural Heritage Sub Committee	Stakeholder days Yearly	
Better identified and recorded heritage			
Natural Heritage	Data collection – updated records for the project area, records for Local Record Centre and BAP updated.	As part of the ongoing project activity Yearly updates to BAP.	Scheme & Project staff & Partnership partners
Built & Ancient Heritage	Heritage and risk database.	Updated during year 1 of the delivery phase following area needed resurveying. Commitment to further resurvey.	Consultants appointed to undertake the work
Cultural Heritage	More local history records into local archives through archiving strategy and collection.	As project is implemented.	Scheme & Project staff & Partnership partners
People will have – developed skills, learnt about heritage, volunteered time			
People reporting skills development – numbers and nature of skill.	Number of people activity; activity feedback, including	At end of specific skills development activities;	Scheme & Project staff Project/activity

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What	How	When	Who
	stakeholder days. Participant comments recorded; other techniques; testimonials Interviews Survey (type to be decided – in the field, online, phone)	stakeholder days; before and after questionnaires As and when comments are heard Interim and final evaluations Interim and final evaluations	personnel Evaluator Evaluator
Skills accreditation – numbers, nature and level	Data collection: number of people gaining AgoredCymru accreditation; number of people gaining other qualifications	At end of specific skills development activities.	Scheme & Project staff Project/activity personnel
People reporting learning something about the cultural or natural heritage of Elan Valley	Ad hoc comments recorded via Facebook & App Activity feedback Interviews Survey (type to be decided – in the field, online, phone)	As and when comments are heard At end of project activity/event Interim and final evaluations Interim and final evaluations	Scheme & Project staff & activity personnel Activity lead Evaluator Evaluator
Time volunteered	Data collection – number of volunteers, number of hours.	At each activity involving volunteers	Scheme & Project staff
For communities, environmental impacts will be reduced, more people and a wider range of people will have engaged with heritage, and the local area/community will be a better place to live, work or visit.			
Project staff reporting and/or providing evidence of reduced environmental impacts	Data collection specific to a project. Interviews	Interim and final evaluations Interim and final evaluations	Evaluator, with input from Project Leads.
Numbers of people engaging with	Data collection	At every activity, plus quarterly	Scheme & Project staff

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What	How	When	Who
heritage		collation	& activity leads
Numbers & nature of opportunities presented by the Scheme for people to engage with heritage	Data collection	Quarterly	Scheme & Project staff
Characteristics of people engaging with heritage	Data collection – standardised content. To be confirmed after further discussion with Partnership, but could include: age, gender, resident/frequent visitor/first time visitor.	At a sample of activities – to be decided by Project Partnership.	Scheme & Project staff
People who have engaged with heritage reporting positive experiences & benefits	Survey (type to be decided – in the field, online, phone) Ad hoc comments recorded	Interim and final evaluations As and when comments are heard	Evaluator Scheme & Project staff
Local people and visitors describing positive perceptions about the Elan Valley	Survey (type to be decided – in the field, online, phone) Ad hoc comments recorded	Interim and final evaluations As and when comments are heard	Evaluator Scheme & Project staff
Local businesses reporting commercial improvements and a stronger visitor economy	Survey (type to be decided – online, phone) Ad hoc comments recorded	Interim and final evaluations As and when comments are heard	Evaluator Activity & project personnel

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What	How	When	Who
Stakeholders noting landscape scale change	Interviews	Interim and final evaluations	Evaluator
Making a difference			
Landscape and ecological heritage			
Improved habitats	Ecological monitoring – biodiversity, birds. Photographic recording.	Yearly biodiversity monitoring Yearly photographic evidence Yearly reports to Natural Heritage Sub Committee Some additional monitoring activity will be tailored to meet the needs the monitoring subject.	Scheme & Project staff & Partnership partners
Improved habitat management	Data collection – management agreements, small grants, farmer groups active. Stakeholder feedback.	Yearly biodiversity monitoring Yearly photographic evidence Yearly reports to Natural Heritage Sub Committee Some additional monitoring activity will be tailored to meet the needs the monitoring subject. Stakeholder days	Scheme & Project staff & Partnership partners
Better identified and recorded natural heritage	Ecological monitoring – biodiversity, birds. Photographic recording.	Yearly biodiversity monitoring Yearly photographic evidence Yearly reports to Natural Heritage Sub Committee	Scheme & Project staff & Partnership partners

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What	How	When	Who
		Some additional monitoring activity will be tailored to meet the needs the monitoring subject.	
Knowledge and understanding			
Target audiences recognising and articulating the key concepts of 'Elan Story', land management, ecosystem services, cultural heritage, water sources and quality, species and habitats of the Elan Valley.	Interviews, case studies, online survey – to be decided Participant feedback surveys Participant case studies Ad hoc comments recorded on Facebook, App and at VC	Interim and final evaluations End of project activities End of participation As and when comments are heard	Evaluator Scheme & Project staff Activity & project personnel
Other stakeholders demonstrating improved knowledge and understanding of any of these topics	Interviews Ad hoc comments recorded	Interim and final evaluations As and when comments are heard	Evaluator Activity & project personnel
Accessing the landscape			
Numbers using physical access routes and numbers of visitors	Data collection: use of DŵrCymru counter data; location-related app data TBC; pedestrian counters TBC	Yearly figures counted from pedestrian counters App usage stats used for sites around Elan	DŵrCymru. Project staff.
Numbers of participants in Scheme activities, overall and by target audiences	Data collection	All project activities	Scheme & Project staff
Visitors, visitor businesses and other stakeholders reporting an improved	Visitor and visitor business surveys	Sample, at project and Scheme discretion.	Scheme & Project staff & Partnership partners

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What	How	When	Who
visitor offer in the Elan Valley	Stakeholder interviews	Interim and final evaluations	Evaluator
Number, nature and use of new opportunities available for accessing the Elan Valley	Data collection – number and nature of access improvements made Stakeholder interviews.	Relevant project activities Interim and final evaluations	Scheme & Project staff Evaluator
Local feelings and relationships with Elan Valley			
Local people and businesses reporting positive perceptions	Stakeholder interviews, online survey – to be decided Ad hoc comments recorded	Interim and final evaluations As and when comments are heard	Evaluator Scheme & Project staff; Partnership Partners
Participants reporting benefits and positive experiences	Stakeholder interviews, online survey – to be decided Ad hoc comments recorded	Interim and final evaluations As and when comments are heard	Evaluator Scheme & Project staff; Partnership Partners
Heritage related economy, jobs and skills			
Numbers and feedback of businesses reporting perceived economic benefit as a result of the Scheme	Business interviews, online survey – to be decided Ad hoc comments recorded	Interim and final evaluations As and when comments are heard	Evaluator Scheme & Project staff & project personnel
Numbers and feedback of participants reporting perceived economic benefit and/or personal development as a result of the Scheme	Participant interviews, online survey – to be decided Ad hoc comments recorded Participant case studies	Interim and final evaluations As and when comments are heard At end of participation activity	Evaluator Scheme & Project staff
Increase in visitor numbers	Survey at a sample of project locations	Baselines early on in Scheme lifetime, repeat surveys at	Project partners and Scheme & Project staff

Monitoring & Evaluation

What	How	When	Who
		discretion of partners and projects.	
Visitor satisfaction	Website and app usage analysis. Survey (types to be decided by project)	Monthly TBC At discretion of partners and Scheme Occasional sample, at discretion of partners & projects.	Website contractor Project partners and Scheme & Project staff
Visitor business improvements	Rhayader business survey Interviews, survey (type to be decided)	Yearly Interim and final evaluation. Sample of target businesses within Scheme area	Scheme & Project staff supported by partnership partner Rhayader 2000 Evaluator
Improving what the Scheme is doing:			
Partnership working			
Partners reporting positive and effective working relationships	Interviews	Interim and final evaluations	Evaluator
Provision of activities			
Participants reporting positive experiences	Participant feedback forms Interviews	At end of activities Interim and final evaluations	Scheme & Project staff Evaluator
Stakeholders reporting enabling & empowering experiences and examples	Interviews	Interim and final evaluations	Evaluator
Stakeholders giving examples of sharing skills and knowledge	Interviews	Interim and final evaluations	Evaluator
Engagement and relationships			
Stakeholders reporting effective	Interviews	Interim and final evaluations	Evaluator

Monitoring & Evaluation

What	How	When	Who
engagement and relationships with the Scheme, the partner organisations and its projects			
Legacy			
Partnership has project and Scheme level strategies in development/in place for the post-HLF funding period, including volunteering	Interviews	Interim and final evaluations	Evaluator
Partner organisations report feeling equipped to work with new audiences in future	Interviews	Interim and final evaluations	Evaluator
Volunteers (individuals and groups) report feeling confident and equipped to continue after the end of the HLF funded period	Interviews, online survey – to be decided	Final evaluation	Evaluator
Other			
Unintended outcomes	Interviews Annual self-evaluation by partnership	Interim and final evaluations Partnership meeting – end of year	Evaluator Partnership Members & staff
Most significant difference	Interviews Annual self-evaluation by partnership	Interim and final evaluations Partnership meeting – end of year	Evaluator Partnership Members & staff
Significant contextual changes or activities	Interviews Annual self-evaluation by partnership	Interim and final evaluations Partnership meeting – end of year	Evaluator Partnership Members & staff