
**AHF Evaluation Strategy
Methodology
2020-2023**

Contents

Evaluation Strategy	3
Evaluation Strategy Methodology	4
Logic model KPIs	5
Programme-Level Evaluation	7
Heritage Impact Fund	7
Internal Management Data	8
Longitudinal Survey	9

Evaluation

Evaluation Strategy

Our [Evaluation Strategy](#) sets out how we will measure the delivery of our aims and mission, as set out in our Strategy 2020-23.

Our overarching Evaluation Strategy shows our approach to:

- Embedding monitoring of impact at organisational and programme level ;
- Longitudinal evaluation to understand our impact on the lifecycle of projects we fund; and
- Internal evaluation to scrutinise and improve AHF support processes.

Our Evaluation Strategy aims to develop our understanding where we have a focus and impact as an organisation, to try to make data collection as clear and straight forward for the projects that we fund, to meet the needs of external funders who fund us.

Evaluation Strategy Methodology

This evaluation strategy methodology sets out our approach to monitoring and evaluation, it is informed by a conscious awareness of the limitations on what data our small team is able to gather and process. This methodology is reviewed regularly to ensure it reflect practice.

Within our evaluation framework, there are several key strands of monitoring and evaluation:

- Logic model KPIs;
- Programme-level evaluation (including grant exit survey);
- Internal Management data
- Longitudinal Survey; and
- Case studies.

Logic Model

Chief among our data outputs is the AHF **Logic Model**: our method of collecting and reporting against our Key Performance Indicators. Most of the KPIs focus on the immediate impact AHF's support makes to the projects we fund and their impacts within their communities, reporting on anticipated outputs and impacts of grants awarded in the current financial year (the exception is KPI 4, which reports on grants that completed during the current year).

The KPI data is compiled from Grant Applications and Grant Exit Surveys stored on our database (for grants) and from Applications and quarterly updates (for loans) which is stored on the AHF's central server; the data is assessed quarterly. KPI Reports are run using the AHF Filemaker database. The structure of the Logic Model enables it to provide both an overall national/organisational summary for all AHF grant and loan activity, or a summary at the level of an individual programme or country.

Grant Applications are the [online application form](#) used to apply for all AHF grants. The Grant Exit Survey is a short survey that grant recipients must complete before submitting their final payment claim for all standard AHF grants, and is usually completed within 18 months of a grant being awarded; a copy of the survey can be accessed [here](#). We are therefore able to collect feedback from 100% of grant holders, which has improved the reliability of our data and helped us to understand our impacts.

Initial information about loan projects comes in via Loan Applications, which are completed in collaboration with our Investment Officers. All loan recipients, whether holders of our Endowment or Heritage Impact Fund loans, are contacted on a quarterly basis to provide updates on progress, current project stage and organisational resilience. The AHF Investment Team integrates data from these quarterly reviews into the AHF database; as with grants, we are able to collect data for 100% of our loan holders.

These strands of data are processed quarterly, and cumulatively added to the KPI report which will run continuously from 1 April 2020 through the end of the current Strategy period, at the end of March 2023.

The Logic Model and the indicators used for monitoring are described in the table overleaf.

KPI1. Funds for lending	Available funds for lending (£) Amount allocated to date (£)
KPI2. Funds for grant making	Available funds for grant making (£) Amount awarded to date (£)
KPI3. Funds for support service	Available funds for support service (£)
KPI4. People and organisations enabled to take ownership of historic assets / acquire long-term rights	% of organisations (charities, social enterprises, community businesses) completing since April 2020 helped to secure/take ownership of/acquire long-term rights to historic buildings
KPI5. Organisations able to attract investment/access support from other funders	Amount of funding (£) secured by projects from other funders
KPI6. Number of projects supported through stages of AHF Investment and Support System	Projects moved forward to the next stage of development
KPI7. Organisations are financially resilient and sustainable	% of organisations who report themselves to be financially resilient/sustainable on completion of their grant or loan
KPI8. Historic assets are appropriately repaired and adapted for new sustainable uses	No. of buildings being repaired and/or reused in total
KPI9. New community enterprises are enabled to start up and grow and use historic buildings and places for public benefit	Projected No. of charities and social enterprises (as projected at point of application) expected to be using restored historic buildings for public benefit
KPI10. Vacant spaces and buildings are effectively repurposed and reused to support thriving places	Projected Amount of floor space project at application to be created / safeguarded Number of discrete units projected to be created

Programme-Level Evaluation

Our KPIs have been designed to report on our key outcomes and fit the reporting requirements of our funders to provide a consistent approach to monitoring. Where funders of our grants programmes require the monitoring of additional indicators that fall outside the KPIs, we collect this information via our Grant Application and Grant Exit Survey process. The data is stored on our database and can be processed via bespoke Reports. In the case of Transforming Places through Heritage, a bespoke Evaluation Toolkit also utilises data on high streets provided through our partners at Historic England and the Ministry of Housing, Communities and Local Government

Heritage Impact Fund

In consultation with the funders of our Heritage Impact Fund we have developed a bespoke evaluation framework that monitors projects against two key criteria: developing sustainable futures for historic buildings and social/community/local economic impacts. Applicants are therefore required to provide a measurable social impact framework outlining outcome areas, activities, specific measures and expected targets. Once a loan has contracted, borrowers report on their outcome areas and specific outcomes on a quarterly basis, along with a maximum three additional outcomes that demonstrate delivery of local economic and community impact Further details on the framework can be accessed [here](#).

These additional data points are stored and processed in the same manner as described above.

Internal Management Data

Our KPIs, Programme Level Evaluation and Longitudinal Surveys all focus on our outward outputs and impacts as an organisation. In the past 12 months we have also begun to collect, monitor and analyse a number of Internal Management data points. The information collected contributes to the AHF internal management evaluation and will help to scrutinise and improve AHF support processes. These reports are presented to our Board as supplementary spotlight reports to our quarterly KPIs.

Subjects include:

- Anonymous Client feedback on organisations completing grants and finishing delivery of loan projects
- Survey of organisations that submitted eligible enquiries, but did not go on to apply to AHF
- Average time between stages of Project Life Cycle on our Investment and Support System

Longitudinal Survey

Our KPIs and programme evaluation framework reports are largely focused on the immediate and projected future impacts that our support makes for projects. Since much of our grant funding is for early-stage project work, our KPIs alone cannot fully demonstrate the medium and long-term impacts that our funding has on the projects we support, or their impacts within their communities once they are operational.

In order to help us understand these longer-term impacts of AHF investment and also to learn more about the challenges facing projects, we conduct **Longitudinal Survey** work on historical projects at 5 and 10 years after the completion of their grant, and 10 years from the draw-down date of loans.

Compiled annually, the data-driven Longitudinal Survey seeks to assess:

- The length and structure of project lifecycles:
 - How long does it take for AHF-funded projects to move through the lifecycle stages from Viability to Project Development, into Capital Redevelopment and finally into Operational Stage? And
 - What percentage of AHF Viability and Project Development Grants, and Capital Redevelopment grants/loans have progressed, completed or failed at 5 and 10 years?
- Delivery of outcomes:
 - What tangible outcomes (e.g. number of units, total floorspace regenerated) have projects funded by our Viability and Development Grants and Capital Redevelopment grants/loans delivered within historic buildings at 5 and 10 years?
 - Sector strength and resilience: How have AHF grants, loans and advice impacted on the sustainability, skills level, and resilience of the organisations we have funded?
- Feedback on the advice and support provided by AHF

The Longitudinal Survey is concise, simple, and quick to complete. A link to the survey can be accessed [here](#)

The survey is conducted annually with a survey sent to all organisations that received a grant 5 and 10 years previously, as well as all those that received a loan 10 years previously; desk-based research is employed to fill in incomplete or missing surveys. The proportion of responses is assessed to calculate the confidence and reliability of the data using standard statistical confidence interval tests. (<https://www.surveymonkey.com/mp/margin-of-error-calculator/>)

A total of 226 grantees have been contacted over the initial 3 phases of the project. This includes 120 contacted during the current third phase.

14 loan clients have been contacted who drew down their loan 10 years ago.

	Contacted	Responded	Response rate
P1	26	13	50%
P2	80	31	39%
P3	120	53	44%
Total	226	97	43%

Although a survey of projects cannot not give 100% reliable or accurate results the response rate and population size of our combined 3 phases of longitudinal studies do give a high level of confidence and can allows us to make assumptions on the long-term impact of our grants across a 5- and 10-year period.

Overall, we can be 95% confident that the responses from the survey are within 8% accuracy of the entire survey population (statistical confidence test for margin of error <https://www.surveymonkey.com/mp/margin-of-error-calculator/>). A 95% confidence interval is considered industry standard for population surveys.

As we conduct more surveys in subsequent phases our dataset will continue to become more robust, with a lower margin of error.

Fay McCulloch

Monitoring and Impact Officer

Email: fay.mcculloch@ahfund.org.uk

The Architectural Heritage Fund

ahfund.org.uk

Tel: 020 7925 0199

Email: ahf@ahfund.org.uk

The Architectural Heritage Fund

Company Number: 1150304

Charity Number: 266780

Scottish Charity Number: SC043840

Financial Services Register number: 707421