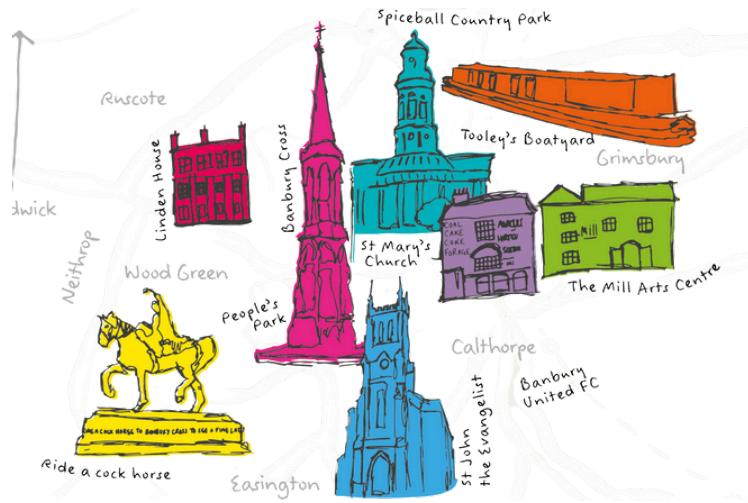


Focus on... EVALUATION

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January 2025



Evaluating wellbeing experiences with older adults: Challenges, recommendations and practice

This short Focus piece reflects on the work of the Banbury Heritage Project, a partnership between Historic England and Age UK Oxfordshire. It forms part of the project's [online resource pack](#). The project, running between June 2023 and December 2024, explored how marginalised communities might lead on enhancing wellbeing where they live. Here, regular contributors to the project – Dr Timothy J. Senior and Dr. Karen Gray – reflect on what it means to do wellbeing evaluation right with older adults.

Introduction

Heritage assets are increasingly recognised as powerful enablers of wellbeing for individuals and communities. Wellbeing – at its heart about people's experiences of struggling or thriving – is a multifaceted concept, one that can be described and measured in different ways. For older adults, engaging with heritage for wellbeing purposes brings with it a unique mix of life experiences, expectations, opportunities, as well as needs. As we report elsewhere (see Resources), participants in the **Banbury Heritage Project** valued heritage engagement for how it supports social connection, resilience (or resistance) and self-expression in the face of the realities of ageing.

A failure to understand the many different kinds of benefits that come with heritage engagement, and how to bring them about, will limit the capacity of organisations to adapt and grow their wellbeing programmes for older adults. However, conventional approaches to evaluation may fail to capture the true value of good programming and how they bring about wellbeing outcomes. Projects focusing on older adults and heritage may also present additional challenges for conventional evaluation frameworks, tools and methods.

In this Focus on Evaluation, we summarise some of our learning from the Banbury Heritage Project on how to support wellbeing evaluation with older adults. This learning draws on observations, workshops, active project participation, case stories, and interviews with project stakeholders.

Challenges

Validated measures, such as the Warwick Edinburgh Mental Wellbeing Scale (WEMWBS), or loneliness scales such as those recommended by the Office for National Statistics, can provide important insights when a project has clearly identified and measurable outcomes. They will give results that can be compared across cohorts and with general populations. Some, like ICECAP-O, can play a role in delivering economic value assessments.

For many of the older adults taking part in the Banbury Heritage Project, their engagement with heritage, and the wellbeing benefits it might bring, was exploratory. Participants came in with open minds about what they might achieve individually or together, each with their own reason for being there. This can run at odds with the way conventional evaluation tools and metrics are conceived.

Our experience of working with older adults engaging with heritage suggests that:

- 1. Heritage is rarely a classic ‘intervention’:** The value of heritage assets will be activated for individuals through many interacting factors and conditions. As such, it can be challenging to link wellbeing outcomes convincingly to an individual programme or activity. Participants may also not approach their engagement in heritage with a distinct wellbeing outcome in mind, or even the sense that they have ‘poor wellbeing.’
- 2. Small change, big value:** Older adult participants often face complex issues such as increasing physical or cognitive frailty, grief and loss, and social isolation. They may value – or even prioritise – small changes to wellbeing, such as a first step to combat isolation, a re-discovery of a sense of purpose following loss, or new ideas on how to manage changes to their health. Any heritage project in isolation would struggle to overcome these challenges, and the positive impact they might make ***may not*** translate into ‘significant change’ when measured with standard quantitative metrics.
- 3. Change is not time-limited:** Unless used longitudinally, most survey tools, by their very nature, conceive of interventions as time-limited; change that occurs before or after an intervention can simply not be assessed. However, important changes may happen outside of the limited scope of a funded project: an altered attitude or an increased social circle could mean that wellbeing improvement, with continued support, is now possible where it wasn’t before. Without knowledge of where people have come from in their lives and where they are headed, changes in pre-post metrics may reveal, in the end, very little.
- 4. Heritage and wellbeing are multi-faceted:** Older adults may choose to participate in a heritage programme for different reasons and important real-world outcomes that result may be unknowable in advance to all involved. Evaluators and programme managers may need to flesh out the real-world contexts for participation, as well as its outcomes for individuals and groups during an activity or even after it has concluded. This means a different type and time-scale of engagement with participants (to that found in many conventional evaluation approaches) is needed.

5. Wellbeing comes alive through people's stories: For older adults, engaging with heritage assets will draw on, and then shape, different elements of inter-relating experiential, social, and cultural life – elements that speak to someone's present, past and future. Telling a 'story', ***and being listened to***, may be a more meaningful way for someone to articulate their experiences, even if it may be difficult for an evaluator to understand exactly what such stories tell us about wellbeing (and how they might be compared to the experiences of others).

Recommendations

These insights lead us to the following recommendations:

- **Evaluation tools and approaches must be chosen wisely:** We need to better match evaluation approaches and tools to programmes of activity. Heritage engagement can lie along a continuum from formalised intervention (following a specific and replicable process towards intended outcomes) to a more open exploration of anything and everything that an activity might offer. People's lives are multi-faceted, and so are their wellbeing needs – heritage engagement can respond to this complexity in people's lives. If the intended outcomes of a project are open, then structured evaluation activity may better focus on uncovering outcomes as they unfold and trace the routes created towards them.
- **Flexible, reflective evaluation approaches are desirable:** We need to accommodate the diverse ways in which older adults experience, describe and narrate their own wellbeing. For example, an approach that elicits someone's thoughts through natural conversation or creative activity might capture experiences in a way that a pre-post wellbeing scale (or a conventional interview) could never do. A focus on how heritage assets ***can*** shape important wellbeing dimensions such as community, connection, self-expression and person-hood will keep its potential open for someone rather than close that potential down.
- **Evaluation must benefit participants as well as organisations:** We need to support evaluation practices that work ***for*** and ***with*** people, rather than simply collect (extract) data about their experiences. Understanding how wellbeing changes relate to a person's life, and how it might have future impact for them over time, should – at its very best – also help that person play a role in their own wellbeing journey. Such an understanding will inevitably help organisations shape, adapt, look back, and plan forwards in their own work.
- **People can make transformative contributions to evaluation practice:** We need to equip older adults with every opportunity to shape how organisations work with heritage assets, but also contribute to how they understand the value such engagement creates. Given the right support, older adults can offer a rich resource of lived experience and cultural knowledge for any heritage activity and its evaluation. As participants, they will enrich planned activities, provide unexpected insight, and offer organisations the opportunity to redefine what 'success' could (and should) look like.

In Practice

Our work with the Banbury Heritage Project is contributing to the development of a new evaluation approach for capturing wellbeing outcomes. Grounded in the work of the Connecting Through Culture as We Age project at The University of Bristol, this new practice is being developed to address some of the key challenges outlined above.

Substantial collaborative work with older adults involving workshops, interviews and facilitated creative activities has enabled us to identify the key wellbeing dimensions and outcomes that matter most. That work, in part conducted through the Banbury Heritage Project, has also helped ask important questions about how people choose to articulate their wellbeing stories and what it means for evaluation activities to dovetail with that expression.

An outline of this emerging evaluation practice, and the wellbeing stories it can help generate, can be found in the Banbury Heritage Project's [online resource pack](#). Here, we summarise some of the emerging principles that are guiding our work. Our new evaluation practice will:

- Structure and articulate participants' stories about wellbeing, helping them to reflect (on their own terms) whilst also supporting organisations to compare experiences across groups and programmes, a way to reveal trends and common paths to wellbeing outcomes.
- Offer a more natural way for people to reflect on their wellbeing and draw meaningful connections between their own needs and value created through engaging with heritage, all with future opportunities in-mind for sustaining or opening-up wellbeing.
- Be highly adaptable, offering different ways to capture wellbeing stories. This means it will be able to take into account the needs, capacities, and desires of participants as well as the resources and time available for programmed activities.
- Easily integrate into programmed activities, rather than sit apart from them. This opens up considerable potential for combining with other tools to capture additional dimensions of wellbeing specific to those activities and any intended project outcomes.
- Generate different types of evidence that benefit everyone: participants gain fresh insight into their wellbeing, organisations gain structured narratives relating programming to impact, and funders gain from simple quantitative data that can convey headline trends.



Resources

For more information on the Banbury Heritage Project, including a Focus piece on Co-creation, wellbeing stories, and other resources: <https://creativelaterlife.com/heritage-project/>

For more information about wellbeing: <https://whatworkswellbeing.org/about-wellbeing/>

Find out about the Warwick Edinburgh Mental Wellbeing Scale and how to use it:

<https://warwick.ac.uk/fac/sci/med/research/platform/wemwbs>

Office for National Statistics guidance about how to measure loneliness:

<https://www.ons.gov.uk/peoplepopulationandcommunity/wellbeing/methodologies/measuringlonelinessguidanceforuseofthenationalindicatorsonsurveys>

Information about the ICECAP-O wellbeing measure, which can be used in economic evaluation:

<https://www.bristol.ac.uk/population-health-sciences/projects/icecap/icecap-o/>

Find out more about the **Connecting through Culture As We Age** project, which was funded through the UKRI Healthy Ageing Challenge and led from University of Bristol: <https://connectingthroughcultureasweage.info/>

The Centre for Cultural Value's Principles of Good Evaluation:

<https://www.culturehive.co.uk/CV/resources/how-to-co-create-an-evaluation/>

The Authors

The authors of this short Focus piece are Dr Timothy J. Senior and Dr Karen Gray, commissioned through the non-profit Wicked Problems agency **supersum**. Supersum helps people work together in new ways around Wicked Problems, those that speak to different fields of expertise and so resist straightforward and easy answers.

Dr Timothy J. Senior is a multi-disciplinary researcher focusing on the field of Wicked Problems, Clumsy Solutions and Messy Institutions.

Dr Karen Gray is a researcher and evaluator with a particular interest in how we can better articulate and share the value of arts, cultural, and leisure activities that support people's wellbeing. Work on the new wellbeing evaluation practice outlined will continue through 2025, with full details and toolkits published in due course. Please get in touch if you are interested in learning more about our approach or participating in its development.

If you want to learn more about this Focus piece, contact supersum at: team@supersum.works