

Research Update

Evaluating wellbeing with participants in archaeology at the National Trust

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Abstract

Wellbeing has not been at the core of the practice of public archaeology in the UK. Instead it is a niche practice focusing on specific therapeutic needs. The idea of wellbeing as a policy objective at a more strategic level has, however, been gaining ground across the arts, cultural heritage and archaeological sectors. The three-month secondment at UCL that is the focus of this piece took place at the end of 2021 and evaluated participatory archaeology in order to understand the outcomes of archaeological activities involving volunteers at the National Trust. This fitted with the Trust archaeologists' aspirations to integrate wellbeing evaluations into their participatory projects. While mental health is a core focus of wellbeing in the heritage agenda writ large, National Trust priorities determined that it was not the focus of this project. Rather, the aim was to help the Trust build an evidence base for reflective practice to inform future programmes and to support the development of a bespoke evaluation framework and strategy for participatory archaeology for its volunteers and visitors. Considerable work had already been undertaken by the Trust staff to inform them about wellbeing, public benefit, nature connection and evaluation, although consultation with their archaeologists and partners in the sector revealed organisational needs for strategic guidance on evaluating participation in archaeology.

Keywords: evaluation, wellbeing, community archaeology, scoping review, policy analysis, consultation, heritage connection

Introduction

The author's secondment to the National Trust was funded by UCL's Innovation and Enterprise team to launch a strategic research partnership between the two institutions. The project was managed by the Centre for Applied Archaeology–Archaeology South-East, the technical consultancy arm of the UCL Institute of Archaeology. The project links to key objectives in the National Trust's Research Strategy, which includes a vision of heritage for everyone, forever, and thus inclusion and diversity are fundamental to its agenda. The wider context is the results-based culture called for in the Barber report (2017) on reforming the public sector, which sets out how to demonstrate the value of publicly funded work to its intended recipients. Such work requires advanced competencies, yet project evaluation and social impact data-handling are not currently among of the skills taught in public archaeology at universities, nor in professional development for practitioners (Moshenska 2017).

The National Trust has nearly six million members, 50,000 volunteers and manages about 100,000 known archaeological sites within its holdings, which total around 250,000 ha, including protected landscapes, 1,750 scheduled monuments and parts of 11 World Heritage Sites. Its 15 archaeologists, aside from their input to decision-making for these sites, are also responsible for managing participatory projects, which often have external partners and funders. The Trust has been seeking feedback from its public archaeology projects for some time but, with the exception of the National Trust Festival of Archaeology, there is no standardised approach to evaluating volunteers and their wellbeing in terms of mental health, but also more widely.

Research design

The secondment aimed to provide the National Trust and UCL with a basis for future work on the evaluation of subjective wellbeing in archaeology projects against wellbeing in the general population,

rather than those seeking specifically therapeutic outcomes. Volunteer projects at National Trust properties are diverse, and include individuals of all ages, often in partnerships with external organisations, such as archaeological societies, museums, schools, commercial archaeology units, museums and wider public interest groups.

The scope of the review was defined by focusing on archaeologist-led volunteer activities beyond a therapeutic mental health focus: excavation, field walking, metal detecting, monument condition monitoring, finds work and archive work. During the first phase of the project, between September and mid-October 2021, a literature review was conducted of 38 articles in peer-reviewed academic journals and other publications and 25 heritage sector reports. The review included a sector-wide policy analysis, a study of industry frameworks and of sector standards. Search terms included public archaeology, community archaeology, evaluation of learning, museums and wellbeing, culture and wellbeing, public benefit, social impact, mental health, historic environment, impact evaluation and outcome evaluation. Resources included UCLs e-resources, relevant UCL masters course reading lists (MA Public Archaeology, MA Cultural Heritage), websites and reports on relevant sector organisations and colleagues' recommendations, followed by institutional literature analysis.



Figure 1 A rainbow over the Wicken Fen site visit (Source: National Trust 2023)

During the second phase of the secondment, 12 online and telephone interviews were held with National Trust staff and external partners. These were recorded, transcribed and analysed with key themes identified. A site visit took place to Wicken Fen, Norfolk (Figure 1) in mid-November 2021, one of the Trust's many projects engaging local communities in the conservation and management of the fen landscape, with volunteers' views incorporated in the visit. During the final phase of the secondment, draft heritage and wellbeing evaluation tools were created and the results of the work were presented in February 2022.

Some preliminary observations

Research has shown that interaction with heritage or the historic environment can be a positive factor in supporting individual and community wellbeing. The secondment found that the Arts, Museum and Nature Conservation sectors have emerged as leaders in national networks on wellbeing and evaluation. The two most frequently used wellbeing scales are the Warwick Edinburgh Mental Wellbeing Scale (WEMWBS) and the Office of National Statistics Wellbeing, which make it possible to measure mental wellbeing in the general population and the evaluation of projects, programmes and policies which aim to improve mental wellbeing. UCL Professor Helen Chatterjee's project, the Museum Wellbeing Measures, also known as the Wellbeing Umbrellas, provided a toolkit that has been adapted to different user groups. Some of these tools have been used by archaeologists, not only with military veterans, but also more widely for public archaeology and heritage projects. Historic England (Monckton 2021), for example, has been building on its partnership with the National Centre for Social Prescribing to provide the sector with high-level guidance. Though the wider Archaeological and Heritage sectors are seeking to define an overarching strategy for evaluating subjective wellbeing arising from different types of heritage work, there is no clear guidance on how to define and evaluate wellbeing in relation to the historic environment. Furthermore, there is also a paucity of academic research on heritage, wellbeing and public benefit, although this is a growing trend, in particular in the realm of public health interventions.

Scholars have described the positive impacts and the pitfalls of doing archaeology in a community setting and the impact of doing

archaeology upon a sense of place and self (Sayer 2018). Certain authors, however, have noted a prevalence of long-term research projects that prefer ethnographic and qualitative methods. According to Ellenberger and Richardson (2018, 66), ‘these range from detailed assessments of learning outcomes to explorations of the impact on well-being and socio-economic profiles to simple collations of visitor numbers and anecdotal comments collected during events and activities’ with ‘an overall lack of methodology, a heavy reliance on anecdote, and sometimes crude measures for success’. Other writers suggest that there is an absence of an agreed evaluation methodology for more quantitative approaches to understanding (Sayer 2018; Wilkins et al. 2021). A report commissioned by the national wellbeing organisation What Works Well (Pennington et al. 2018), conducted by a team from the Institute of Psychology, Health and Society, University of Liverpool, and the Centre for Health Promotion Research, Leeds Beckett University, concluded that the evidence pointed towards a positive impact on individual and community wellbeing. It is worth noting that this scoping review did not distinguish between active and passive participation, nor did it separate general from clinical publics.

The Heritage sector has since been consulting widely on strategic guidelines and pushing for agreed evaluation strategies. Professional sector bodies, such as the Chartered Institute for Archaeologists (CifA) representing mainly the commercial sector, have also been advancing these topics in their client guides. Museum of London Archaeology, the contracting arm of the Museum of London, in partnership with HS2 Ltd, Historic England, the *Europae Archaeologiae Consilium* and the CifA, is also addressing the issue through its UK Research Innovation Future Leadership project.

Archaeology and wellbeing at the National Trust: organisational literature and consultation

Archaeologists at the National Trust felt that their participatory work fitted well with the wellbeing and public benefit agenda and saw the need to blend culture into the Trust’s approach to making nature connections. A preliminary report from a collaborative research project with Durham University, focusing on public archaeology events at several

of their properties in Northumberland, had led the Trust to focus on seeing participation in archaeology as an active way of connecting with an authentic past, as a resource for building skills, volunteering and building knowledge, whether through involving visitors in interpretation such as mapping or in telling new stories, as a way of increasing understanding in the conservation process. These observations tie closely to the wellbeing agenda, not least in increasing the beneficial outcomes of our work for both people and society.

Three focus groups were held with National Trust archaeologists (one meeting) and their partners from the commercial archaeology sector (two meetings) with a number of one-to-one interviews with archaeology partners and a site visit. Discussions were designed as a scoping exercise to explore the contexts of community archaeology, learning/skills and wellbeing evaluation (why, what and how to evaluate, including evaluation cycles), to examine different approaches and types of evaluation and to introduce the idea of Logic Models and Theories of Change. During our discussions, we heard how staff were identifying project outcomes and framing evaluation questions, looking at outcomes, opportunities, processes and barriers.

While Trust archaeologists had adapted the Warwick Edinburgh Mental Wellbeing Scale to their projects, others were using Generic Learning Outcomes created by Arts Council England in partnership with the Museums, Libraries and Archives Council (MLA). All found that data protection regulations prevented the collation of personal information, and all reported that evaluation data were hard to collate as such a wide range of Trust staff were involved, including property managers, outdoor experience staff, curators, rangers and countryside managers, volunteer coordinators, visitor experience staff, the insights team and project managers.

Participatory evaluation tools

Participating in archaeology can be connected to wider wellbeing benefits identified by the New Economics Foundation (Aked et al. 2008) as five action-based steps: connecting, being active, noticing, learning and giving. The National Trust/UCL partnership then created a series of

National Trust-specific tools and a set of recommendations on how to evaluate archaeology at the Trust, resulting in a Participatory Archaeology Wellbeing Framework, which is provisional but now in use (Table 1).

Table 1 Provisional Participatory Archaeology Wellbeing Framework

Connect	Participating in archaeology can strengthen a connection of people to people, places and objects.
Be active	Participating in archaeology enables people to be active and stay healthy.
Take notice	Participating in archaeology requires deep concentration and can foster a deeper sense of belonging, satisfaction of discovering something new, encouraging mindfulness, inclusion and noting place.
Keep learning	Participating in archaeology involves learning specific skills sets, both in terms of method but also interpretation, with all its nuances.
Give	Participating in archaeology allows volunteers to give their time and skills, collecting information that can be used to care for and protect our heritage, but also to improve projects and processes.

Table 2 Draft heritage questionnaires

Outcome 1	
Take notice, be active	1. I notice the heritage in my local area
- Contact	2. I recognise and appreciate the skills of past peoples
- Interest	3. Doing heritage work makes me feel stronger
Outcome 2	
Learning	4. I understand how past peoples have shaped the landscape around me/in the local landscape
- Meaning	5. I have a good understanding of how modern human activity impacts heritage
- Facilitation	6. I am engaged in learning about our past and the issues heritage face now and in the future
- Interest	
Outcome 3	
Connect & give	7. I visit historic places, and plan to visit more historic places
- Emotion	8. I volunteer to help understand and conserve the heritage in my place
- Compassion	9. I feel connected to people in my local community
	10. I feel connected to my local area
	11. I feel connected to the human history of this area

A second tool is the National Trust's Wellbeing framework, designed to help Trust archaeologists design their evaluations around a set of desired measurable wellbeing related outcomes, which were then incorporated into a third tool currently under development, its Participatory Archaeology Theory of Change (modelled on the Happy Museum project, DigVentures and the outcome framework of the National Heritage Lottery Fund). However, it does feed into the Trust's 'heritage connectedness scale', which, although unverified or piloted, forms the basis of a questionnaire (pre- and post-activity) for participants in its projects (Table 2).

Conclusions

Since the end of the secondment, work by Everill and Burnell (2022) and Tully et al. (2022) has set out suggestions not only for how to set up heritage and mental health projects, touching on evaluation and proposing new guidelines (especially in relation to mental health interventions), but also for measuring subjective wellbeing (Gallou 2022). Historic England's partnership in the Thriving Communities programme, alongside Arts Council England, Natural England, NHS England and NHS Improvement, Sport England, the Money and Pensions Service and NHS Charities Together with the National Academy for Social Prescribing will further this agenda in the coming years. The National Trust/UCL project leads have also joined a national working group led by Historic England and the Council for British Archaeology looking at the evaluation of wellbeing in archaeology. Both the National Trust and UCL hope to continue their discussions about evaluation tools, as well as identifying further research gaps. A further aim is that wellbeing is taught to UCLs students as a core aspect of their training, and that the public benefit of archaeology is widely promoted.

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Declarations and conflicts of interest

Research ethics statement

Not applicable to this article.

Consent for publication statement

Not applicable to this article.

Conflicts of interest statement

The author declares no conflicts of interest with this article. All efforts to sufficiently anonymise the author during peer review of this article have been made. The author declares no further conflicts with this article.

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