

Essential Networks project (development phase)

Invitation to tender for Evaluation Consultant

1 Summary

Heritage Trust Network seeks to appoint an evaluation consultant to advise on and facilitate the evaluation of the development phase of Essential Networks. The consultant will work with the Programme Manager and Chief Executive, other staff and trustees and representatives of our membership to ensure that effective learning takes place during this development phase and that it informs the delivery phase plans and application and the Network's policies and practice more generally. We would hope that the consultant appointed for this phase of the project could be retained for the delivery phase.

2 Background

Heritage Trust Network is the membership body for independent community organisations, charities and social enterprises that are saving, restoring and managing historic buildings, parks, gardens, canals and railways. Our membership includes both organisations specifically set up to save heritage sites and community organisations that deliver other types of services and have chosen to operate from historic buildings and spaces. We also welcome individuals, businesses and local authorities that support local heritage action. Together we organise conferences, site visits, meetings and online resources where we can network and learn from each other and meet experts and funders.

Essential Networks is a major development and resilience project for Heritage Trust Network, our members and UK heritage. It will resource the Network over the next five years as a major sector infrastructure organisation to provide significantly enhanced support to small and medium sized community-led heritage organisations. In the development phase we aim to:

- Test improvements in our services and activities
- Test innovative new services and activities
- Improve our systems and practices to build our capacity ready for the delivery phase
- Inform the plan and application for the delivery phase

Learning is therefore at the heart of the development phase and effective evaluation will be crucial.

3 Objective

The object of the assignment is to provide advice, support and an independent expert view to ensure the effective evaluation of the activities undertaken as part of the development phase project. We are seeking to ensure that:

- Appropriate data is gathered to track project activities and beneficiaries, including baseline data.
- Appropriate feedback is gathered from project participants.
- Outputs and outcomes are monitored.
- There are sufficient opportunities for staff, trustees, funders and representatives of members to reflect on the project's achievements and shortcomings.
- Lessons are learnt and documented from the development phase.
- Learning informs plans for the delivery phase and the delivery phase bid.

4 Scope of services

As noted above we are seeking independent expert advice and support to help us carry out the Essential Networks development phase project which is in essence an evaluative project. Therefore, we are not seeking an evaluator to undertake all data gathering, processing, analysis and report writing.

Our development phase plan lists 24 activities. However, some of these activities involve consultant-led reviews of our activities and organisation. They are therefore evaluative and learning-focussed in themselves and should not need substantial additional evaluation support. Therefore, while the appointed consultant should take an overview of all the activities, they should concentrate their support on helping us to evaluate the more member- and public-facing activities. In particular:

- Open events programme
- Structured learning programme
- Member networking events
- Income earning events
- Strategic review piloting
- Health-check piloting
- Mentor training
- Outreach campaign
- Impact survey
- New approaches to volunteering

Evaluation will be carried out in accordance with Heritage Fund guidance. Based on this guidance and learning from previous evaluations (in particular Unlocking the Power of Communities and more recently Digital Heroes) we will ensure that:

- evaluation is integrated into the necessary data-gathering activities of the project so as not to put an extra burden of form-filling on to participants, volunteers or project staff. For example, baseline-data gathering will be integrated into the application, induction and diagnostic processes of the project.
- evaluation data is processed through Heritage Trust Network's CRM, rather than the separate systems of an evaluation consultant, so that it contributes to our ongoing operations and performance management at an organisational level. An allowance has been made in the budget for adjustments to our CRM to accommodate data from this project.
- the burden of form-filling for participants, volunteers and project staff is kept to a minimum.
- sufficient time and resource are given over to reflection among staff, trustees and member representatives to ensure that lessons are learnt from the process.
- we consider how we can work towards an evaluation framework for the whole of the organisation that can be applied across several projects.
- an evaluation framework is in place for the delivery phase

The appointed consultant will work with the Programme Manager and Chief Executive on an evaluation report. We will discuss who is responsible for drafting which sections of the report, but the consultant should undertake a final review. The report should be as succinct as possible so that staff, trustees and other stakeholders can make use of it in their future activities and in planning for the delivery phase.

5 What are we looking for?

We are looking for a consultant who has:

- Wide-ranging knowledge and experience of evaluation within small or medium sized charities.
- Experience of working with membership organisations.
- An understanding of the heritage sector and in particular the section of the sector represented by our members.
- Commitment to the approach outlined in 4 above.
- A commitment to a co-design practice, working collaboratively with our team and our members, and enabling our staff, trustees and other volunteers to learn from the process.

6 Timetable

The evaluation consultant will be needed throughout the life of the development phase project from February 2023 to March 2024. An indicative timetable is:

February – March 2023	Initial meeting with Programme Manager and Chief Executive.
March – April 2023	Intensive period of work on agreeing data gathering requirements and modifying systems to meet those requirements.
April 2023 – February 2024	Regular bi-monthly meetings to monitor and reflect on progress, mainly involving Programme Manager and Chief Executive but sometimes expanded to workshops with other staff and trustees and/or Network Development Group.
February – March 2024	Joint work on evaluation report.

7 Budget

The maximum budget for this work is £7,500 excluding VAT and including any expenses. Payment terms will be agreed on appointment. The budget for the evaluation support during delivery phase will be £30,000.

8 How to apply

Bidders are required to

1. Complete [this online form](#) to provide business information (if you are submitting a response to more than one invitation to tender you need only do this once). We advise you to do this as early as possible so that we are aware that you are bidding and can share with you any clarifications that we issue.
2. Submit a written response to the brief of no more than 6 pages providing information on:
 - People: Details of the individuals that will undertake this work highlighting how they meet the requirements set out above at section 5. Specify who will be the lead consultant.
 - Experience: Three relevant examples of where you have undertaken similar work in the past
 - Approach: Outline your response to the brief above and how you will approach the different phases of the work.

- Budget breakdown: A breakdown of time allocated for each element of your programme and a total cost including expenses.
- References: Contact details from two projects you have been involved with that we can contact for a reference

Note that we will not accept any other materials beyond 6 pages. Please do not attach any other appendices or supporting documents. Additional documents will not be considered. Your submission should be a pdf. The minimum font size for your submission should be 11pt. We will not be liable for any costs you incur in submitting your tender.

If you are submitting proposals for more than one of the consultancy/associate commissions that we are currently advertising you may submit, in addition to the separate tenders for each opportunity, a single-page document of no more than 300 words explaining the benefits of combining those commissions and the synergies to be achieved.

Tenders should be emailed to David Tittle david.tittle@heritagetrustnetwork.org.uk by midday on 6th February. We reserve the right not to consider any submissions where the tender document or business information form is received after the deadline.

Any clarifications should be emailed to David Tittle david.tittle@heritagetrustnetwork.org.uk and they will be answered in writing. Clarifications may be shared with all known bidders. We cannot guarantee to answer clarification queries after midday on 3rd February.

We reserve the right not to appoint.

9 Procurement timescale

15 th December 2022	Early notification of opportunity (expressions of interest requested)
13 th January 2023	Invitation to tender advertised
Midday 6 th February	Deadline for submissions
w/c 13 th February	Interviews
17 th February	Appointment

10 Evaluation

Responses will be evaluated on the basis of the initial submission. Higher scoring bidders' references will be taken up and they may be invited to interview. Scores may then be adjusted. Responses will be scored as follows:

Score	Classification	Characteristics
4	Excellent	Exemplary response. Comprehensive and relevant information is provided and the response provides the evaluation panel with a very high level of confidence that the bidder will be able to meet the requirements of the project if appointed, with no reservations or concerns arising from the response.
3	Good	Comprehensive and relevant information is provided and the response provides the evaluation panel with a high level of confidence that the bidder will be able to meet the requirements of the project if appointed with no more than one limited reservation or concern arising from the response.

2	Satisfactory	A broad response with an adequate level of information provided that is relevant and the response provides the evaluation panel with at least a good level of confidence that the bidder will be able to meet the requirements of the project if appointed with no more than minor reservations or concerns arising from the response.
1	Poor	The response is limited and lacking in relation to a large proportion of material elements and leaves the evaluation panel with significant reservations or concerns around the ability of the bidder to meet the requirements of the project if appointed.
0	Unacceptable	No response or extremely limited response that does not suggest that the bidder has the ability to meet the requirements of the project if appointed.

In assessing your experience and approach we will take account of your track-record and proposed approach regarding equality, diversity and inclusion, sustainability and social impact.

Sections included in tenders as set out above, have been allocated a weighting which will be applied to the scores as follows:

Section	Weighting (%)
People	20%
Experience	30%
Approach	30%
Cost	20%

There is a maximum budget for this project of £7,500 including all expenses (excluding VAT).

The Network does not necessarily want, and is not required, to appoint the cheapest bid but needs to include price within the evaluation to ensure a robust process and evidence of pursuing value for money through procurement. The Network will not cover costs associated with preparation of tender materials.

The cost elements of the bids will be scored with the lowest bid scoring 4 and the scores of other bids will be calculated on the basis of:

$\text{lowest bid/other bid} \times 4$

Therefore if Firm A's bid was the lowest tender at £7,000 and Firm B bid £7,500

Firm A would score 4 and Firm B would score 3.73.