Evaluation of the Green Recovery Challenge Fund Round Two

**Organisation The National Lottery Heritage Fund, in partnership with the Department for Environment, Food and Rural Affairs (DEFRA)**

**Department** Business Innovation and Insight

**Title of procurement Evaluation of the Green Recovery Challenge Fund Round Two**

**Brief description of supply**  Evaluation

**Estimated value of tender** up to £140,000 including VAT

**Estimated duration** Until end of September 2023

**Name of the Heritage Fund Contact**  Catherine Elvin

**Timetable** Response deadline: Thursday 27 January 2022 at Noon.

 Clarification meetings: w/c 31 January 2022

 Confirmation of contract: w/c 14 February 2022

 Completion of research: 30 September 2023

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# Overview

This Invitation to Tender for evaluation services has been issued by the National Lottery Heritage Fund (‘the Heritage Fund’).

We are actively seeking suppliers to deliver the evaluation of the second round of GRCF funding.

**The National Lottery Heritage Fund**, formerly the Heritage Lottery Fund (HLF), was set up in 1994 under the National Lottery Act and distributes money raised by the National Lottery to support projects involving the national, regional and local heritage of the United Kingdom. We operate under the auspices of the National Heritage Memorial Fund (NHMF). The Heritage Fund invests in the full breadth of the UK’s heritage and, through our funding, we aim to make a lasting difference for heritage and people.

The Heritage Fund is the delivery body for the Government’s Green Recovery Challenge Fund (GRCF), in partnership with DEFRA.

**DEFRA** is the UK government department responsible for safeguarding our natural environment, supporting our world-leading food and farming industry, and sustaining a thriving rural economy. Our broad remit means we play a major role in people’s day-to-day life, from the food we eat, and the air we breathe, to the water we drink.

In addition, GRCF us supported by the following stakeholders.

## The GRCF stakeholders

**Natural England** are the government’s adviser for the natural environment in England, helping to protect England’s nature and landscapes for people to enjoy and for the services they provide. Natural England is an executive non-departmental public body, sponsored by the Department for Environment, Food & Rural Affairs.

**Environment Agency** works to create better places for people and wildlife, and support sustainable development. EA is an executive non-departmental public body, sponsored by the Department for Environment, Food & Rural Affairs.

**The Forestry Commission** increases the value of woodlands to society and the environment. The Forestry Commission is the government department responsible for protecting, expanding and promoting the sustainable management of woodlands.

**The Marine Management Organisation** licenses, regulates and plans marine activities in the seas around England so that they’re carried out in a sustainable way. MMO is an executive non-departmental public body, sponsored by DEFRA.

**The Joint Nature Conservation Committee** is the public body that advises the UK Government and devolved administrations on UK-wide and international nature conservation. It is led by a Joint Committee, which brings together members from the nature conservation bodies for England, Scotland, Wales and Northern Ireland and independent members appointed by the Secretary of State for the Environment, Food and Rural Affairs under an independent Chair.

## The Green Recovery Challenge Fund

The Green Recovery Challenge Fund was first announced by DEFRA in June 2020, as a new fund of up to £40 million for nature recovery and conservation. In November 2020 an additional £40 million was announced to further support environmental renewal while creating and retaining a range of jobs in England. The Green Recovery Challenge Fund brings forward public investment to help charities and environmental organisations start work on projects across England that will restore nature, tackle climate change and connect people to the natural world.

90 projects were awarded funding in June and July 2021, adding to the 69 projects awarded funding in round one. The 90 round two projects are scheduled to complete by the end of March 2023.

Full guidance on round two of the Green Recovery Challenge Fund can be found on the National Lottery Heritage Fund’s website[.](https://www.heritagefund.org.uk/funding/closed-programmes/application-guidance-green-recovery-challenge-fund-round-2)

[Green Recovery Challenge Fund round 2 | The National Lottery Heritage Fund](https://www.heritagefund.org.uk/funding/closed-programmes/application-guidance-green-recovery-challenge-fund-round-2)

An interim report evaluating the progress of round one is in draft but has not yet been published, and will be shared with the successful supplier.

## **Evaluation of round two of the GRCF**

This brief is for the programme evaluation of the second round of the Green Recovery Challenge Fund. It also includes outline proposals for drawing together some common findings across both rounds of the Green Recovery Challenge Fund– as an £80 million intervention delivered from late 2020 to March 2023.

The evaluation of round two will also consider how the lessons that funders and key stakeholders have learned from round one have been applied, the impact of the updates that were made to the grant-making processes for the second round of funding and the impact of projects funded in round two.

The outline method and research requirements section of this brief covers the five proposed strands of research, with the evaluation focussing more heavily on impact and overall value for money, and taking a lighter touch approach to examining the process for delivering the second round of GRCF funding – focussing on the delivery context for round two projects and changes to Heritage Fund processes that were put in place after round one.

# Aims and Objectives of the Evaluation

The objective of this evaluation is to provide insight into round two of the GRCF, including its outcomes and value for money, and triangulating those with findings from round one of the funding, to give an initial picture for the GRCF overall.

The focus of the evaluation will be in providing insight into the delivery and outcomes of round two projects, learning the lessons from the second cohort of projects.

The questions the evaluation will seek to answer include:

* What lessons have been learnt from delivering the round two projects and what are their implications for future land and nature projects and investments? This could include:
	+ The opportunities and challenges presented for eNGOs by a successful application to GRCF.
	+ The influence of the external environment on projects (e.g. COVID restrictions or the labour market).
* To what extent have the intended short term outcomes of the GRCF been met through the second round of funding and, where comparisons are possible, how does this relate to findings from round one of the GRCF?
* What legacy does the GRCF funding leave and how should DEFRA, and partners continue to monitor impact beyond the end of the programme?
* Has value for money been demonstrated in terms of delivery of environment, engagement and economic objectives during the second round of funding and for the programme overall? This includes:
	+ How does the cost-effectiveness of GRCF compare to other similar programmes?
	+ Which sectors and occupations have benefitted from the implementation of the programme?
	+ What is the geographic distribution of the benefits of GRCF?

In meeting these objectives, we will apply best practice grant delivery requirements under Government Grants Functional Standards. We also require that this evaluation meets HM Treasury [Magenta](https://www.gov.uk/government/publications/the-magenta-book) and [Green Book](https://www.gov.uk/government/publications/the-green-book-appraisal-and-evaluation-in-central-governent) guidance.

We require that potential suppliers set out in the proposal a methodology to achieve the aims and objectives of the study.

# Theory of Change and Outcome Indicators

As part of the evaluation of the first round of GRCF funding, a theory of change and set of outcome indicators has been developed (See Annex A). This framework will also be broadly applied to round two projects, with review required where there are differences in the delivery context or process for the two rounds of funding. Full details of the evaluation framework will be shared at inception stage.

Example sections of the indicators framework are detailed below. All funded projects are sent guidance on the data that is needed as part of project monitoring and copies of this guidance have been published as supplementary documents to this ITT. The Heritage Fund collects and maintains live data with funded projects in all areas outlined in the guidance, across both rounds of funding, and will supply this to the contractor.

Example themes from the GRCF measurement framework:

## Nature conservation and restoration and nature based solutions

* Type of land / habitat benefitting from GRCF activity
* Area of land benefitting from GRCF activity
* Type and condition of species targeted
* Tree planting

## Connecting people with nature

* Visitor infrastructure improved or installed
* People engaging with project activities

## Resilience and employment

* Employment
	+ Direct jobs – people employed by the grantee / a partner organisation.
	+ Indirect jobs – for example someone employed by a contractor.
* Volunteering
* Skills
* Resilience

# Monitoring Data

Monitoring data is collected by the Heritage Fund with GRCF project users via a bespoke website and database. This system is in operation with round two and round one users, with the first deadline for round two submissions set as the 16th December 2021.

Full data from the monitoring system will be made available to the successful supplier.

As an initial guide for potential suppliers, the table in Annex C describes the structure of the data that will be made available. All project activity is linked to a site and the database contains spatial information for around 2,000 locations where GRCF activity is happening. Full information on the fields collected can be supplied to the successful supplier on appointment.

# Outline Method and Research Requirements

The partners have identified the following strands of research that *could* be applied to meet the aims and objectives of the evaluation, highlighting where there were differences between round one and round two funding.

This should be used by suppliers as an indication of the type of analysis we believe might be appropriate. We invite alternative approaches that meet the brief and suppliers are not in any way obliged to follow the strands as outlined below.

## Strand One - Profile of Portfolio of Funded Projects

The successful contractor should provide a rich profile of the overall portfolio of projects funded in round two of the GRCF and, where possible, exploring how the cohort overall compares to those funded in round one.

The Heritage Fund will supply the successful contractor with core data on the projects funded by the Green Recovery Challenge Fund, and reporting completed on round one projects. This will include the details supplied at application stage on the applicant organisation, project sites, activities and outcomes, costs and match funding. The Heritage Fund will also supply funded projects’ own evaluation reports.

The partners are interested in analysis of the portfolio by geography – for example, jobs created by local authority area / constituency and project activity by site designation/protected status (eg. SSSI, AONB, National Parks, World Heritage Site). We are interested in how this analysis might be displayed visually, using GIS mapping, for example.

## Strand Two – Delivery Evaluation

The partners require that the evaluation examines how the second round of GRCF funding has been delivered, whether the policy and aims underpinning the GRCF were delivered as planned, from the perspective of applicants, grantees/project leads and stakeholders. We are particularly interested in understanding which elements of delivery have worked well and which were challenging and why this was the case.

We anticipate that this aspect of the evaluation is a lighter touch than other strands. There is the opportunity to make use of existing lessons learned and evaluation documentation from round one. This work can focus on the key differences in processes used and new insights from round two projects. For example, for round two projects, looking at differences in delivery and operating context, supply chain, recruitment and volunteering.

Key application process and requirement changes from round one include:

* Advice provided by Natural England, the Environment Agency and the Forestry Commission during the application writing period for large projects. A survey of applicants who received this advice is required for this element;
* Introduction of a requirement for match funding (5% minimum) for large projects;
* A reduced maximum bid – round two capped at £2million; and
* Maximum of one application per organisation per grant level.

## Strand Three – Outcomes and Impact

A Theory of Change, and output and outcome indicator framework for the GRCF was developed in consultation with partners and funded projects as part of the evaluation of round one. It is expected that this same framework be applied to round two, with changes to fit a small number of revised aims and objectives – for example the emphasis on different habitat types and on apprenticeships. The Theory of Change is owned and maintained by the project team and we will share these with the successful bidder.

The Heritage Fund collects detailed spatial, activity and output data with funded projects against a range of indicators and will supply this to the supplier.

The partners are interested in approaches to:

* Round two jobs, skills and economic data - evidence of the economic benefits and future needs. This includes:
	+ direct and indirect jobs and skills creation/retention\*;
	+ capacity, overall workforce and workforce demographic\*; and
	+ future workforce needs and skills gaps.
	+ Wider economic benefits of projects, for example, impact on their local area.
	+ Sources of match funding, and potential for future investment.
* Measurement of the initial conservation benefits of the GRCF round 2:
	+ Reporting progress and impact for those GRCF indicators that align with the 25 Year Environment Plan measures (e.g. tree planting and area of land\*)
	+ Analysis of the species and priority habitats targeted through GRCF activity\*.
	+ Analysis of the initial condition of sites benefiting from GRCF activity\*.
	+ Legacy plans and the longer term impact of all projects

\*Data in these areas is collected by the Heritage Fund with projects through the monitoring system described in section 4.

## Strand Four – Value for Money Evaluation

The partners require that the evaluation contractor conducts a value for money assessment of the Green Recovery Challenge Fund – building on round one findings with round two. This assessment will rely on the evidence collected through the other strands of the evaluation and relevant secondary literature.

In line with Green Book guidance, the partners are seeking to understand:

* A view of the true costs of delivering the projects.
* Natural, economic, social and wellbeing benefits that have been delivered by the funding.
* The distributional, employment and indirect economic impact of the funding.
* Any unintended consequences, both positive and negative.
* The degree to which the findings are likely to be applicable to other green/environmental schemes.

## Strand 5: Synthesis of evidence, recommendations and lessons learned

Potential suppliers are invited to propose appropriate methods for triangulating the evidence from the different strands to provide an overview of the effectiveness of the Green Recovery Challenge Fund in meeting its intended outcomes and impact. This includes reporting on the lessons learnt for the partners, stakeholders and the wider sector in using relatively short term funding to deliver environmental and economic outcomes, and should incorporate the relevant evidence from round one of the GRCF.

Acknowledging the inherently long-term nature of many environmental outcomes, the successful contractor will should consider proposals for future research as part of the recommendations.

# Outputs

* 1. The following outputs will be required:
* Project Initiation Document, including evaluation design, plan and methodology, timelines and dependencies.
* Regular progress reports
* Interim reports – anticipated to be provided on approximately 6 monthly basis.
* A final report and accompanying slide deck.
* Documentation of data modelling and a set of research data, to be stored in a readily accessible electronic format, to be agreed with the Heritage Fund
	1. We would expect that the report/s from the evaluation are used by the partners in understanding and reporting on the impact of the investment in GRCF and planning future initiatives.
	2. We would normally publish the reports from the evaluation publicly and would anticipate both funded projects, and the wider land and nature sector to be interested in the findings.
	3. The evaluation will also be used to inform strategy and policy development. We will expect the consultants to identify learnings and feed these back throughout the evaluation so that we can act on to make any changes to our support.
	4. The successful bidder will be expected to discuss and present findings at appropriate times, to internal and external audiences, including the DEFRA project board or relevant steering groups for the fund, grantees, policy makers and other external stakeholders. The purpose of these presentations is to enable lessons to be learned and key policy and practice issues to be highlighted as the evaluation progresses.
	5. A project plan with specific deliverables\* and timetable will be agreed with the successful consultant. However, The National Lottery Heritage Fund (the Heritage Fund expects the following deliverables in accordance with the following timetable as a minimum:

|  |  |
| --- | --- |
| **Deliverable/Key Milestones\*** | **Due date** |
| Project Initiation Document, including evaluation plan and methodology, timelines and dependencies. | Within a month of project initiation. |
| Inception Meeting to agree plans, including reporting structures, learning events and a communication and dissemination strategy | Within a month of project initiation. |
| Short interim reports outlining findings and analysis completed during the previous period.  | At around 6 monthly intervals, but as a minimum:May 2022,November 2022 & May 2023 |
| A final report with structure agreed with the Heritage Fund, and accompanying slide deck.  | September 2023 |

The above represents our minimum requirements.

\* The Heritage Fund reserves the right to amend this timetable where required.

* 1. All reports must adhere to The Heritage Fund’s accessibility and formatting guidance (appended). We also expect reports to follow the layout advised in our evaluation guidance. The initial findings should be provided to The Heritage Fund and its partners. The partner organisations are committed to the publication of research findings and we may commission summary reports and other materials for subsequent wider distribution.
	2. We expect all our evaluations and research projects to generate evidence about the inclusivity of our funding and our performance in addressing inequality. Bidders must be committed to this principle and ensure evidence gathering addresses this requirement.
	3. All reports to include appendices as agreed between The Heritage Fund and the contractor. The contents and structure of the report to be agreed in advance of writing. All reports to be supplied in electronic format and hard copy if requested.
	4. The successful bidder must comply with all of the requirements of the Data Protection Act 2018 and shall ensure appropriate research consents from interviews or any data collection.
	5. We expect the successful bidder to focus on improving, rather than just proving, including a mechanism for feeding back evidence that demonstrates the difference being made and enables changes to be made, based on learning, enabling the programme to maximise its impact.
	6. Bidders should be committed to adapt to the evolving nature of the programme.
	7. We expect all projects we fund to adhere to the Social Research Association (SRA) ethical guidelines. If your proposal raises particular ethical issues, you must indicate what they are and what your strategy for addressing them is.

# Contract management

* 1. We expect the evaluation to begin week commencing 21st February 2022 and be completed by 30th September 2023. The final report shall be submitted to the Heritage Fund by 15 September 2023.
	2. The anticipated budget is up to £140,000 to include all expenses and VAT. The contract will be let by The National Heritage Memorial Fund.
	3. The payment schedule will be split into four payments; 25% completion of the Project Initiation Document (March 2022), 25% on completion of the second interim report (November 2022), 25% on the third interim report (May 2023) and 25% on submission of final report in September 2023.
	4. The contract will be based on The Heritage Fund’s standard terms and conditions.
	5. The research will be managed on a day to day basis for The Heritage Fund by Catherine Elvin.

# Award Criteria

* 1. A proposal for undertaking the work should be a maximum of 20 pages and include:
* a detailed method for undertaking the study;
* details of staff allocated to the project, together with experience of the contractor and staff members in carrying out similar projects. The project manager / lead contact should be identified and the potential supplier should specifically highlight their experience in natural environment/natural sciences and connecting to nature (social science) research.
* the allocation of days between members of the team;
* the daily charging rate of individual staff involved;
* a timescale for carrying out the project;
* an overall cost for the work.
	1. Your Bid will be scored out of 100%.

**70% of the marks will be awarded to Quality**

Each question will be scored using the methodology in the table below.

**Tender responses submitted will be assessed by the Heritage Fund against the following Quality Questions:-**

| Selection Criteria | Weighting |
| --- | --- |
| Demonstrated a clear understanding of the aims, objectives and main concerns of the evaluation, particularly outlining how you will address each of the four themes (nature conservation and restoration, nature based solutions, connecting people with nature and resilience and employment). | 20% |
| Demonstrated that the methods selected are appropriate to the research requirements set out in this brief and adhere to the Magenta and Green Book principles. | 25% |
| Demonstrated an awareness of the different policy contexts, research and issues relating to nature conservation and restoration, particularly in response to biodiversity loss and climate change.  | 25% |
| Demonstrated the suitability of the team, assigned roles and responsibilities and their experience in natural and social science research and a suitable approach to performance and risk management. We expect bidders to demonstrate that they have capacity to deliver the evaluation on time, on budget and to the required standard with the proposed team in the bid. | 20% |
| Demonstrated well considered plans for feeding back learning and dissemination of evaluation findings | 10% |

## Quality Questions scoring methodology

| Score | Word descriptor | Description |
| --- | --- | --- |
| 0 | Poor | No response or partial response and poor evidence provided in support of it. Does not give the Heritage Fund confidence in the ability of the Bidder to deliver the Contract. |
| 1 | Weak | Response is supported by a weak standard of evidence in several areas giving rise to concern about the ability of the Bidder to deliver the Contract. |
| 2 | Satisfactory | Response is supported by a satisfactory standard of evidence in most areas but a few areas lacking detail/evidence giving rise to some concerns about the ability of the Bidder to deliver the Contract. |
| 3 | Good | Response is comprehensive and supported by good standard of evidence. Gives the Heritage Fund confidence in the ability of the Bidder to deliver the contract. Meets the Heritage Fund’s requirements. |
| 4 | Very good | Response is comprehensive and supported by a high standard of evidence. Gives the Heritage Fund a high level of confidence in the ability of the Bidder to deliver the contract. May exceed the Heritage Fund’s requirements in some respects.  |
| 5 | Excellent | Response is very comprehensive and supported by a very high standard of evidence. Gives the Heritage Fund a very high level of confidence the ability of the Bidder to deliver the contract. May exceed the Heritage Fund’s requirements in most respects. |

**30% of marks will be awarded for Price.**

The evaluation of price will be carried out on the Schedule of charges you provide in response to **Table A**

**Price Criterion at 30%**

30 marks will be awarded to the lowest priced bid and the remaining bidders will be allocated scores based on their deviation from this figure. Your fixed and total costs figure in your schedule of charges table will be used to score this question.

For example, if the lowest price is £100 and the second lowest price is £108 then the lowest priced bidder gets 30% (full marks) for price and the second placed bidder gets 27.6% and so on. (8/100 x 30 = 2.4 marks; 30-2.4 = 27.6 marks)

The scores for quality and price will be added together to obtain the overall score for each Bidder.

**Table A - Schedule of Charges**

Please show in your tender submission, the number of staff and the amount of time that will be scheduled to work on the contract with the daily charging rate.

Please complete the table below providing a detailed breakdown of costs against each capitalised description, detailing a total and full ‘Firm Fixed Cost’ for each element of the service provision for the total contract period. Bidders may extend the tables to detail additional elements/costs if required.

VAT is chargeable on the services to be provided and this will be taken into account in the overall cost of this contract.

As part of our wider approach to corporate social responsibility the National Heritage Memorial Fund/National Lottery Heritage Fund prefers our business partners to have similar values to our own. We pay all of our staff the living wage (in London and the rest of the UK) and we would like our suppliers and contractors to do likewise. Please highlight in you proposal/tender/bid whether you do pay your staff the living wage.

Bidders shall complete the schedule below, estimating the number of days, travel and subsistence costs associated with their tender submission.

**TABLE A: (firm and fixed costs)**

| **Cost** | **Post 1 @cost per day****(No of days)***e.g. Project Manager/ Director**@ £2* | **Post 2 @cost per day****(No of days)***e.g. Senior Consultant/manager/researcher**@£1.5* | **Post 3 @cost per day****(No of days)***Junior* *Consultant/equivalent* *e.g. £1* | **Total days** | **Total fees** |
| --- | --- | --- | --- | --- | --- |
| Inception meeting to agree plans and finalise requirements with the Heritage Fund | *Example 0.5* | *1* | *1.5* | *3* | *£4* |
| *[Add as necessary]* |  |  |  |  |  |
| *[Add as necessary]* |  |  |  |  |  |
| *[Add as necessary]* |  |  |  |  |  |

| Cost Type | Value (£) |
| --- | --- |
| Sub - Total  |  |
| VAT |  |
| Total\* |  |

(This must include all expenses as well as work costs; this figure will be used for the purposes of allocating your score for the price criterion and must cover the cost of meeting all our requirements set out in the ITT)

***Notes:* The Heritage Fund reserves the right to clarify quality and prices and to reject tenders that demonstrate an abnormally low quality response. The Heritage Fund also reserves the right to amend the timetable of work where required.**

*You should not submit additional assumptions with your pricing submission. If you submit assumptions you will be asked to withdraw them. Failure to withdraw them will lead to your exclusion from further participation in this competition.*

# Procurement Process

* 1. The Heritage Fund reserves the right to reject abnormally low scoring tenders. The Heritage Fund reserves the right not to appoint and to achieve the outcomes of the research/evaluation through other methods.
	2. We are inviting submissions from a single organisation or a consortium to deliver all areas of this evaluation work. We anticipate two possible scenarios:

The Heritage Fund appoints a single organisation, who has the capacity and skillset to deliver all aspects of this evaluation work; or

A consortium is appointed, who together bring the required skills and resources to deliver all aspects of this this evaluation work. We are open to proposals from consortia of organisations or individual consultants, where the appropriate measures in place to ensure clear lines of management and communication. Payment arrangements will be via a single organisation and these details should be included in the tender return.

* 1. The procurement timetable will be:
* Deadline for clarification questions: Midday, Wednesday 12 January 2022
* Tender return deadline: Noon, Thursday 27 January 2022
* Clarification meetings\*\* may be held with shortlisted consultants and would take place during the week commencing: 31 January 2022, by video call
* The Heritage Fund will notify bidders of our procurement decision week commencing: 14 February 2022
* \*The Heritage Fund will upload response to clarification on Contracts Finder. Please note that we will make the anonymised questions, and our responses to them, available to everyone on the Heritage Fund website.
* \*\*We reserve the right to carry out clarifications if necessary; these may be carried out via email or by inviting bidders to attend a clarification meeting.  In order to ensure that both The Heritage Fund’s and Bidder’s resources are used appropriately, we will only invite up to three (the ultimate number will depend on the closeness of the scores) highest scoring bidders to attend a clarification meeting.  Scores will be moderated based on any clarifications provided during this meeting.  You are responsible for all your expenses when attending such meetings.
	1. Your tender proposals must be sent electronically via e-mail before the tender return deadline of Noon, Thursday 27 2022 to the following contact:

Diane LaRosa

Bii.Admin@heritagefund.org.uk

* 1. Please visit [The Heritage Fund's website](https://www.heritagefund.org.uk/) for further information about the organisation.

# Annex A: Output and Outcome Indicators for GRCF Round One

## Nature conservation and restoration and nature based solutions

|  |  |  |
| --- | --- | --- |
| **Aspect** | **Output indicators** | **Outcome indicators** |
| Type of land benefitting from GRCF activity (information to be collected at site level) | * Whether the area where activity has been completed is protected or designated (e.g. SSSI).
	+ Yes/No. If yes, type of designation (e.g. SSSI) and area (ha) subject to designation
* Type of habitat at each site. [[UK BAP Priority Habitats list](https://jncc.gov.uk/our-work/uk-bap-priority-habitats/#list-of-uk-bap-priority-habitats)]
* Baseline condition of habitat at each site
* Expected condition of habitat at each site by project completion (March 2022)
 | * Expected condition of habitat at each site by March 2030
 |
| Area benefitting from GRCF activity | * Area (ha) over which habitat creation activities have been completed
* Area (ha) over which habitat restoration activities have been completed
* Area (ha) over which maintenance activities have been completed
* Area (ha) over which invasive species have been controlled
* Area (ha) over which abatement of pollution has been conducted
* Area (ha) over which habitat change for carbon sequestration has been conducted (including e.g. woodland, peatland restoration, seagrass planting)
* Area (ha) over which activities for climate change adaptation have been conducted
* Number and type of natural flood management interventions delivered

*NB. Habitats or features not measurable in hectares should preferably be measured in km (e.g. rivers or hedgerows)* | * Area (ha) of wildlife rich habitat created at local level
* Area (ha) of habitat restored to an improved condition
* Area (ha) of local habitat protected and maintained
* Area (ha) of connective habitat created
* Area (ha) free of invasive species
* Area (ha) over which pollution has been reduced or eliminated
* Amount of CO2e to be sequestered up to 2030
* Area (ha) that is better adapted to climate change
* Expected reduction in likelihood and scale of flooding

*NB. Habitats or features not measurable in hectares should preferably be measured in km (e.g. rivers or hedgerows)* |
| Type and condition of species targeted | * Baseline condition of species at each site
* Number of species for which protection, management or reintroduction activities have been completed
* Names of species for which protection, management or reintroduction activities have been completed
* Expected condition of species at each site by project completion (March 2022)
 | * Expected condition of species at each site by March 2030
 |
| Tree planting (excluding replacement or replanting) | * Number of trees planted at each site by project completion (March 2022)
* Number of species planted at each site by project completion (March 2022)
* Names of species of trees planted
 | * Number of trees that projects expect to survive through to March 2030
 |

## Connecting people with nature

|  |  |  |
| --- | --- | --- |
| **Aspect** | **Output indicators** | **Outcome indicators** |
| Visitor infrastructure improved or installed | * Length (km) of new routes to access nature installed
* Length (km) of routes to access nature improved, repaired or maintained
* Number of new signage/information points installed
* Number of new visitor facilities installed (e.g. visitor centres, green gyms, etc.)
* Number of visitor facilities improved, repaired or maintained
* Nature of visitor facilities installed, improved, repaired or maintained
* Number of visitor journeys made by foot or bicycle through each site during 2021
* Average duration of visit to site during 2021 (minutes)
* Number of people visiting each site for recreation, exercise and refreshment during 2021
 | * Expected number of visitor journeys to be made by foot or bicycle through each site by 2025
* Expected duration of average visit to site by 2025 (minutes)
* Expected number of people visiting each site for recreation, exercise and refreshment during 2025
 |
| People engaging with project activities | * Number of engagement and awareness raising events and activities organised and held, by type of event/activity (e.g. workshop, guided walk, training, citizen science project)
* Number of people attending events and participating in activities
* Number of projects targeting specific under-represented audiences (e.g. young people, BAME communities, people from deprived backgrounds, etc.)
* Examples of approach to targeting specific under-represented groups
* Number of school children (under 18s) attending events
* Number of schools engaged
 | * Number of projects where event participants report improved connection with nature (e.g. through post-event surveys)
* Number of projects where event participants report improved knowledge/skills (e.g. through post-event surveys)
 |

## Resilience and employment

|  |  |  |
| --- | --- | --- |
| **Aspect** | **Output indicators** | **Outcome indicators** |
| Employment*This will include:**Direct jobs – people employed by the grantee / a partner organisation.**Indirect jobs – for example someone employed by a contractor.* | For lead organisations, partner organisations, contractors and freelancers:* Jobs created by GRCF (number, FTE, contract length and role titles)
* Jobs retained for GRCF (number, FTE, contract length and role titles)
* Number of jobs supported through Full Cost Recovery (number and FTE)
* Number of Kickstart placements
* Equalities data on new staff recruited (where collected)

For lead and partner organisations:* Examples of approaches to targeting specific under-represented groups during the recruitment process
* Amount spent (£) on wages and salaries for project staff
* Amount spent (£) on goods and services (if possible, split by labour vs. materials)
* Number of FTE positions that, without GRCF, would have been furloughed
* Amount saved (£) in furlough/benefit payments
 | * Jobs that will be retained by the lead/partner organisations beyond March 2022 (number, FTE, contract length and role titles)
 |
| Volunteering | * Number of new volunteers recruited
* Number of volunteer days worked in 2021
* Number of projects recruiting volunteers from under-represented groups
* Examples of approaches to targeting volunteers from under-represented groups
 | * Number of volunteers who will continue to be available for future projects beyond March 2022
* Number of volunteers with new knowledge/skills
 |
| Skills | * Number of new apprentices / trainees
* Age of apprentices / trainees
* Title and level of apprenticeship
* Number of other employees who have been trained through the project
* Number of volunteers who have been trained through the project
 | * Number of apprentices/trainees to be offered a permanent position with the lead/partner organisation
 |
| Resilience | * Number of projects that formed new partnerships in order to deliver the project
* Number of projects where existing partnerships have improved and become stronger as a result of the project
* Number of project sites that have remained fully or partly operational through 2021
* Total revenue and/or funds generated by project activities (£)
 | * Number of projects that have built on these new/stronger partnerships for future projects
* Total revenue and/or funds (£) to be reinvested in future projects
 |

# Annex B: Accessibility and formatting guidance

The National Lottery Heritage Fund is committed to providing a website that is accessible to the widest possible audience. Our site is annually tested by accessibility auditors and we must meet a AA compliance level. Our accessibility testing encompasses not just site functionality and design but all of our content, including downloadable documents.

Reports and other documents created for The Heritage Fund (**including the tender submissions**) need to be clear, straightforward to use and ready to circulate internally, externally and online, as well as suitable for use by screen reading software. Best practice in accessibility is summarised below:

## Readability

In the final report, and all other documents that may be published online including the tender application consultants should ensure that:

* The size of the font is at least 12pt;
* There is a strong contrast between the background colour and the colour of the text. Black text on a white background provides the best contrast. This also applies to any shading used in tables and/or diagrams;
* Italics are only used when quoting book titles for citations and items on the reference list should be arranged alphabetically by author
* Colour formatting and use of photos should be of a resolution size that is easily printable and does not compromise the printability of the document.
* For further guidance on ensuring readability of printed materials, please refer to the RNIB Clear Print guidelines. These can be found on the [RNIB website](http://www.rnib.org.uk/Pages/Home.aspx).

## Accessibility

Reports should adhere to the following guidelines:

## Formatting

Headings and content in your document should be clearly identified and consistently formatted to allow easy navigation for users. Heading Styles should be used to convey both the structure of the document and the relationship between sections and sub-sections of the content. Heading styles should follow on from each other i.e. Heading 1 then Heading 2.

## Spacing

Screen readers audibly represent spaces, tabs and paragraph breaks within copy, so it is best practice to avoid the repetitive use of manually inserted spaces. Instead, indenting and formatting should be used to create whitespace (e.g., use a page break to start a new page, as opposed to multiple paragraph breaks).

## Alternative text

Alt text is additional information for images and tables. This extra information is essential for both document accessibility (screen reading software reads the Alt text aloud) and for the web. Alt text should be concise and descriptive, and should not begin with ‘Image of’ or ‘Picture of’.

## Images

These should be formatted in-line with text, to support screen readers. Crediting pictures may be necessary, usually in response to a direct request from a third party.

## Tables

These should be for used for presenting data and not for layout or design. They should be simple and include a descriptive title. The header row should be identified and there shouldn’t be more than one title row in a table. There should be no merged or blank cells.

## Additional documents

Any additional information, separate to the report, for example proformas and transcripts which may be used as standalone documents must be fully referenced to the piece of work being submitting and therefore dated, formatted and numbered appropriately.

## Acknowledgement

All reports should acknowledge The Heritage Fund. Our logo can be found on The Fund's website.

## Further resources

Please refer to the WCAG 2.0 article on [PDF techniques](https://www.w3.org/TR/2014/NOTE-WCAG20-TECHS-20140408/pdf.html) for further information.

## Submitting your report to The Heritage Fund

Please check the accessibility of your document using the Word accessibility checker before submitting: File – Info – Check for Issues – Check Accessibility.

Please submit your document as a Word file.

The Heritage Fund retains the right to amend documents in order to create accessible versions for publishing.

# Annex C: Structure of the GRCF Monitoring Database

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Entity Name | Table Name | Definition | EntityType | RowCount (3/12/2021) | Parent Entity |
| Project | Core Project Data | A copy of the project level data for all 159 awards from the Heritage Fund’s grant management system. | Master | 159 |  |
| Sites | GRCF Site Data | A list of all sites benefitting from GRCF activities | Master | 1,940 | Projects |
| Sites Documents | Sites Documents | Files relating to a particular site | Document Library | 271 | Sites |
| Jobs | GRCF Jobs Data | All jobs recorded by projects | Master | 522 | Sites |
| Infrastructure | GRCF Infrastructure | Records of infrastructure improvements by projects | Master | 97 | Sites |
| Engagements | GRCF Engagements | Records of engagement activities completed by projects | Master | 762 | Sites |
| Conservations | GRCF Conservations | Records of nature based solutions activities completed by projects | Master | 392 | Sites |
| BAP Habitats | GRCF Habitats | The list of BAP habitats used in the conservations table. | Reference | 65 | N/A |