



Evaluation of the Sharing Heritage programme

Organisation	Heritage Lottery Fund
Department	Strategy and Business Development
Title of procurement	Evaluation of HLF Sharing Heritage programme
Brief description of supply	Research Services
Estimated value of tender	£20,000 (including VAT and expenses)
Estimated duration	June 2015 to August 2015
Name of HLF Contact	Amelia Robinson Research Manager Strategy & Business Development 020 7591 6258 amelia.robinson@hlf.org.uk
Timetable	Response deadline: 29 May 2015 Interviews (if necessary): Week commencing 8 June 2015 Confirmation of contract: 12 June 2015 Final report: End of August 2015

1. Overview

- 1.1 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). Since April 2013 we have been operating under our fourth Strategic Framework: 'A lasting difference for heritage and people' (see the [HLF website](#) for more details).
- 1.2 HLF 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. This is reflected in the [outcomes for heritage, people and communities](#) that underpin our grant-making.
- 1.3 Sharing Heritage is HLF's smallest grant programme. It provides grants of £3,000–£10,000 for small-scale heritage projects that will undertake a range of activity to help people discover and share their local heritage. It is an open programme for the life of the current Strategic Framework to March 2018: applications are accepted at any time and for any type of heritage activity.
- 1.4 Sharing Heritage was introduced by HLF to provide a heritage-focused grants scheme primarily for voluntary sector groups (for example, local history societies, independent museums, and other community groups wanting to lead on local heritage-related activities). It aims to provide funding for straightforward activities or events, for example, exhibitions, festivals and celebrations, local history publications, conservation of individual heritage items, volunteer training and support and small acquisitions.
- 1.5 HLF simplified the application and monitoring process at this level to a short application form, one grant payment and one completion report. This was intended to support new and diverse groups who had never applied to the HLF before as well as more experienced organisations.
- 1.6 Under this programme, a range of different types of projects are funded as long as they will achieve at least one of the [outcomes for people](#). The outcome we value most is that 'people will have learnt about heritage'.
- 1.7 Sharing Heritage funds applications from: not-for-profit organisations; and partnerships led by not-for-profit organisations.
- 1.8 Projects can focus on a wide spectrum of subject matter which could include exploring local archaeology, a community's cultures and traditions, identifying and recording local wildlife and protecting the surrounding environment, collecting and digitising old photos, producing local history publications, conserving sites or items of local significance, managing and training volunteers, and holding festivals and events to commemorate the past.
- 1.9 Under SF4, 659 Sharing Heritage projects have been awarded £5.4million in grants and 204 have completed.
- 1.10 We wish to commission researchers to undertake an evaluation of the programme.
- 1.11 This research will provide an increased understanding of HLF's small grants programmes following on from the recent evaluation of the [All Our Stories](#) programme.

2. Purpose of the evaluation

- 2.1 The evaluation of the Sharing Heritage programme will help us establish to what extent the SF4 outcomes are being achieved and how the outcome framework impacts on project design, planning and delivery.
- 2.2 The evaluation will help HLF assess the applicants' experience of this particular approach to small grant making, informing HLFs thinking about the appropriateness of the current business model for the future and whether it is effective in providing an entry route to heritage activity for new and diverse groups.
- 2.3 In assessing the programme, we want the evaluation to particularly focus on the following areas:
 - 1) Who and what sort of projects apply to the programme, including:
 - the type of applicants to Sharing Heritage, including type of organisations, are they first time applicants and to what extent is the programme enabling HLF to attract diverse groups, including BAME communities ;
 - the types of heritage that groups choose to feature in projects e.g. archives, intangible heritage etc;
 - the range of people involved in projects, for example people new to considering heritage as part of their daily lived experience;
 - the types of activities run by projects;
 - 2) What do the projects achieve, including:
 - the skills acquired by organisations and individuals through the projects;
 - the social outcomes sought by applicants, and the degree to which these are achieved (see HLF outcomes for people);
 - the heritage outcomes sought by applicants, and the degree to which these are achieved;
 - the types of community outcomes sought by applicants, and the degree to which these are achieved;
 - 3) What is their experience of the Sharing Heritage grant, including:
 - the applicants' motivations for applying;
 - the benefits, if any, the programme brought for the grantee group, for example, increased capacity and willingness to undertake further heritage activity or projects, increased capacity to undertake other activities
 - the applicants' experience of HLF's application and grant management process;
 - the lessons learnt or suggested improvements to the Sharing Heritage programme and current business model.

3. Methodology

- 3.1 The evaluation will involve qualitative and quantitative research with a sample Sharing Heritage projects.
- 3.2 We would like consultants to set out proposals for a detailed research methodology, but envisage that it will involve the following components:
 - a) A review of **all** SF4 Sharing Heritage application data to provide top level findings on approved applicants. The data set contains information on applicant, project description, level of award, geographical data and heritage area.

- b) A review of a sample of 100 applications to provide supporting data on the type of Sharing Heritage applicants and projects.
- c) A review of 100 completion reports drawing on HLF's outcomes framework, to establish the relevant outcomes against which projects funded under the Sharing Heritage programme have delivered.
- d) Interviews with applicant organisations to provide further evidence on the outcomes their projects achieved, the change brought about for the grantees as well as to understand their motivations and experiences of the programme. We envisage approximately 50-60 interviews being conducted.
- e) Undertake case studies with a subset of projects to understand the impact of the grant for staff and participants. This sample would be based on findings from stages a-d and should be decided in collaboration with HLF. We envisage approximately 10 case studies would be completed.

3.3 HLF will provide all the data it holds on the Sharing Heritage programme.

4. Outputs

4.1 We are tendering this work for the period June 2015 to August 2015. During this period the following outputs will be required:

- a draft final written report;
- a final report;
- a set of research data, to be stored in a readily accessible electronic format such as Excel.

All reports to include appendices as agreed between HLF and the contractor. The contents and structure of the report to be agreed in advance of writing. All reports to be supplied in both hard copy and electronic format.

4.2 The final report must adhere to HLF's accessibility requirements (Appendix 1). Final payment will not occur until these requirements have been met.

4.3 The results will be confidential to HLF. HLF may prepare or commission summary reports and other materials for subsequent wider distribution, based on the results.

5. Research management

5.1 We expect the research to begin in **June** and be completed by **end of August 2015**.

5.2 The research will be managed on a day to day basis for HLF by Amelia Robinson.

6. Procurement

6.1 The proposal for undertaking the work should include:

- a detailed methodology 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.
- 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.
- 6.2 As part of our wider approach to corporate social responsibility the National Heritage Memorial Fund/Heritage Lottery 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.
- 6.3 The anticipated budget for this research is £20,000 to include all expenses and VAT. The contract will be let by the National Heritage Memorial Fund under HLF terms and conditions.
- 6.4 The selection criteria will be:
- the extent to which the tender demonstrates an understanding of the issues.
 - the appropriateness of the methodology and methods of data analysis.
 - previous experience of similar heritage and social research.
 - the number of days allocated to the research.
 - proposed team composition, expertise and management.
 - cost.
- 6.5 HLF reserves the right not to appoint and to achieve the outcomes of the evaluation through other methods.
- 6.6 The procurement timetable will be:
- Completed proposal to be returned to HLF by **Midnight 29 May 2015**.
 - Interviews will be held week commencing **8 June 2015**.
 - Confirmation of award of contract by **12 June 2015**.
- 6.7 Proposals can be sent to the following address or emailed:
- Amelia Robinson
Research Manager
Heritage Lottery Fund
Holbein Place
London, SW1W 8NR
020 7591 6258
amelia.robinson@hlf.org.uk
- 6.8 Please visit the [HLF website](#) for further information about the organisation.

Appendix 1: Accessibility Requirements

Reports and all other documents created for HLF 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. The requirements for accessibility are summarised below:

Readability

In all documents produced for HLF, consultants should ensure that:

- the size of the font is at least 11pt;
- 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; and
- 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](#).

Accessibility

Documents 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.
- **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 inline 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 also be simple, and include a descriptive title.

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 HLF. Our logo can be found on the [HLF website](#).