

# First World War Centenary Cathedral Repairs Fund Evaluation brief



## First World War Centenary Cathedral Repairs Fund Evaluation

<b>Organisation</b>	The Archbishops' Council of the Church of England
<b>Department</b>	Cathedrals and Church Buildings
<b>Title of procurement</b>	First World War Centenary Cathedral Repairs Fund Evaluation – phase 1
<b>Brief description of supply</b>	Evaluation Services
<b>Estimated value of tender</b>	£30,000-£40,000 including VAT and expenses
<b>Estimated duration</b>	December 2017 to May 2018
<b>Name of contact</b>	<b>Anne Locke</b> Cathedrals Officer (Contract Manager)      Cathedrals and Church Buildings Division
	Archbishops' Council of the Church of England Church House Great Smith St London SW1P 3AZ Phone: 020 7898 1862 Email: <a href="mailto:anne.locke@churchofengland.org">anne.locke@churchofengland.org</a> Website: <a href="http://www.churchcare.co.uk/cathedrals/funding-and-grants">http://www.churchcare.co.uk/cathedrals/funding-and-grants</a>
<b>Timetable</b>	Response deadline: <b>Monday 20 November 2017</b>  Clarification meetings if required: <b>Week beginning 27 November 2017</b>  Confirmation of contract: <b>Week beginning 11 December 2017</b>  Completion of research: <b>end May 2018</b>

## 1. Overview

The first £20 million of the government's First World War Centenary Cathedral Repairs fund was announced by the Chancellor in the March 2014 Budget and set up with the following objectives:

- To carry out necessary repair works to the fabric of the listed Anglican and Catholic cathedral churches in England. The works should be necessary to keep the building wind-proof and weather-tight, safe and open to the public.
- To carry out repairs to prevent further deterioration of the fabric of the listed building.
- To ensure the listed buildings are in a good and safe state of repair in order to host events commemorating the First World War.

A further £20 million was announced in the March 2016 Budget with the same objectives.

The Fund is administered by the Cathedrals and Church Buildings Division (CCB, also known as ChurchCare) of the Archbishops' Council of the Church of England, on behalf of the Department of Culture, Media and Sport. The first £20 million was allocated in three application rounds and the second £20 million over two rounds, the last in November 2016. The Fund is now fully allocated and all claims must be made by the end of March 2018.

**In total 146 grants have been awarded to 57 Anglican and Catholic Cathedrals. The Fund has supported 133 separate projects (NB some projects received more than one grant).**

The grant applications were assessed by an Expert Panel against the grant objectives, using the following criteria:

- The urgency of the work.
- The contribution of the project to keeping the cathedral safe and open.
- The financial need of the cathedral.
- The impact the completion of this project would have on the cathedral's overall maintenance and repairs programme. This criterion was intended to see where these grants could have maximum impact.

The evaluation will cover both phases of the grant scheme. The first phase of the funding ran to the end of March 2016. This first phase supported 77 projects at 55 cathedrals with grants totalling £20 million.

A second phase of funding runs from July 2016 to end March 2018 and is currently supporting 63 projects at 45 cathedrals. Work on many of these projects is still under way at the time of writing. Grant awards again totalled £20 million.

It is envisaged that the evaluation will be carried out in two stages with the first stage covering the completed projects from Stage 1 and those completed from Stage 2, and the second stage reviewing the later projects as they are completed.

## 2. Evaluation objectives

The objectives of the evaluation are:

- To assess how far the grants have met the Fund's objectives and criteria (see above).
- To assess the wider economic impact of the funding, including impact of the fund on the state of the specialist building industry, e.g. numbers employed, training enabled (including apprenticeships) in traditional craft skills, how easy was it to obtain tenders, impact on local pricing of e.g. scaffolding. This assessment should differentiate between cathedrals with and without in-house works teams.
- To obtain information about the wider community benefits of the funding, e.g. in terms of enabling community activity such as knowledge/learning about the Cathedral and First World War, First World War commemoration and other activities. This will include the ability to reallocate funds towards community activities which would otherwise have been allocated towards repair works.
- To enable learning about what worked well and what worked less well about the grant processes, to inform future cathedral repair funding initiatives.
- To identify how far the grant programme has gone towards meeting the identified long-term maintenance and repair needs of Anglican and Catholic cathedrals in England.
- In particular the evaluation should seek to address the following research questions:
  - how effective repairs have been in tackling each cathedral's repair need, the quality and impact of any repair work on the fabric and the overall condition of the building
  - whether maintenance/the ease of future maintenance has or will have improved post-completion
  - quantification of outstanding repair works at the cathedrals in terms of their cost and urgency [information on previous fabric needs studies carried out by English Heritage and the Association of English Cathedrals in 2004 and 2014 will be provided for comparison].
  - amount of additional funding secured as a result of the grant
  - amount of additional repairs or improvement work which was enabled alongside the grant eligible work (e.g. due to efficiencies occurring as a result of undertaking repairs simultaneously and/or the ability to reallocate funds which would otherwise be directed towards the repairs funded by the grant)
  - the experience of the application and administration processes:
    - the effects, both positive and negative, of the grant scheme being time-limited with tight deadlines for submitting applications and claiming payments, including on the capacity and morale of cathedral staff and contractors
    - for those who had more than one grant, comparison between their experience of the first and second phases and lessons learned
  - particularly for the Catholic cathedrals, the effects of involvement with the grant scheme on their view of their buildings, the value of undertaking repairs

and the experience of working with conservation architects and other professionals.

- To provide individual project summaries, including images, in a publication-ready template format suitable for uploading to a web-based report on the Fund.

The first audience for the evaluation is the Cathedrals and Church Buildings Division, where it will inform our policy and decision making. It will also be shared with the Department of Culture, Media and Sport, the Treasury and the Fund's Expert Panel members.

The project summaries will be published online and the full results may be made publicly available. They may be of interest to other policy makers, funders and practitioners in the heritage sector.

Negative as well as positive comment will be expected and welcomed.

### **3 Methodology**

A methodology for the work is open for consultants to propose. However, we anticipate that it will include some or all of the following:

- a) An assessment of the likelihood of and methodology for achieving robust measurement metrics for each objective and proposed research question of the fund, including other factors which may have an impact.
- b) Review of the application material and (where complete) the final reports for all the 133 projects (NB some projects received more than one grant)
- c) Telephone interviews with a representative of each of the 57 cathedrals concerned to get information to answer the key evaluation questions (NB most cathedral received more than one grant). It is unlikely that cathedral staff representatives will be available in December because of their Christmas programmes, so interviewing is likely to begin in January. Cathedrals with both complete and incomplete projects will need to be re-interviewed in the second phase of the evaluation. Representatives will be notified in advance by the contract manager and lists will be provided to the evaluator.
- d) Telephone interviews with the cathedral architects/surveyors involved with the projects. The number of these interviews will be less than 57 as a number of architects cover several different cathedrals and some will already be nominated as the cathedral's representative under c) – around 30 to 40 interviews are estimated. Architects/surveyors will be notified in advance by the contract manager and lists will be provided to the evaluator.
- e) Email consultation with key organisations involved with these projects (approached via their Secretariat/Administrator) to get their feedback:
  - the Fund's Expert Panel
  - Association of English Cathedrals
  - Cathedral Administrators and Finance Association
  - Cathedrals Fabric Commission for England
  - Catholic Church Patrimony Committee

The budget should allow for monthly meetings with the contract manager, including one at the inception of the project and one at the completion of the first stage of the work (phase 1 project evaluation) in order to review the early findings and fine-tune the methodology for the second stage. These meetings may take place in London or by agreement at cathedral venues, to allow for the evaluator to become familiar with a cathedral environment and project outcomes (this may also allow for the interviews to be carried out face to face). Frequent (several times a month) contact with the contract manager by email or telephone is also envisaged.

The evaluator should also allow for a presentation meeting in London to discuss the draft results with the project team and the Fund's Expert Panel, potentially around the end of the first stage in early spring 2018.

## 4 Outputs

The following outputs will be required:

- a draft interim (Stage 1) report and presentation
- a draft final report
- a final report with a short standalone executive summary
- a powerpoint presentation summarising key findings;
- an overview and a set of one-page project summaries in a publication-ready format suitable for uploading to the web, in an attractive template with appropriate images and graphics
- a set of research data, to be stored in a readily accessible electronic format such as Excel.

All bidders are required to adhere to all appropriate regulations and guidelines on the collection, storage, transmission and destruction of personal data ([MRS/SRA, Data Protection Act 1998: Guidelines for Social Research, April 2013](#)).

Any final reports and the web-ready pages should adhere to the accessibility and formatting guidance appended.

## 5 Research management

We expect the evaluation to begin **during December 2017** with a briefing and preparation phase largely with the Project Manager, and be completed by the end of **April 2017**. The final report shall be submitted by **end May 2017**

The anticipated budget is £30,000-40,000 to include all expenses and VAT. The contract will be let by the Archbishops' Council of the Church of England.

The payment schedule will be 20% at start up after contract exchange; other payments will be agreed with the contractor based on completion of agreed milestones, with 10% to be paid after approval of the final report.

The contract will be based on the Archbishops' Council standard terms and conditions

The evaluation will be managed on a day to day basis for Archbishops' Council by **Anne Locke**.

## 6 Award Criteria

A proposal for undertaking the work should include:

- a detailed methodology for undertaking the study;
- details of staff allocated to the project, including the seniority/experience of each in carrying out similar projects, and the tasks that would be assigned to each. 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.

Your bid will be scored out of 100%.

**75% of the marks will be allocated to your response to the Quality Questions below.** Each question will be scored using the methodology in the table below.

Tender responses submitted will be assessed against the following **Quality Questions**:

1. To what extent does the tender response demonstrate an understanding of the issues related to this evaluation brief?
2. To what extent is the methodology appropriate to the evaluation requirements set out in this brief?
3. What is the extent of the experience of similar heritage evaluation, including historic building conservation?
4. What is the extent of the experience of working with churches, cathedrals or other places of worship?
5. How well has the tenderer structured a research team in order to successfully manage the contract and deliver the required work to the budget and timetable required?

### 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 CCB 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

Score	Word descriptor	Description
		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 CCB confidence in the ability of the Bidder to deliver the contract. Meets CCB's requirements.
4	Very good	Response is comprehensive and supported by a high standard of evidence. Gives CCB a high level of confidence in the ability of the Bidder to deliver the contract. May exceed CCB's requirements in some respects.
5	Excellent	Response is very comprehensive and supported by a very high standard of evidence. Gives CCB a very high level of confidence the ability of the Bidder to deliver the contract. May exceed CCB's requirements in most respects.

Each score will be multiplied by 3 to give a % figure, with each question having a potential maximum of 15 marks. For example a bid scoring 'Excellent' (5) for all five questions would score the maximum of 75%.

**25% of marks will be awarded on the price criteria.** The evaluation of price will be carried out on the Schedule of charges you provide in response to **Table A**

- 25 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 25% (full marks) for price and the second placed bidder gets 28% and so on. ( $8/100 \times 25 = 2$  marks;  $30-2 = 28$  marks)
- The scores for quality and price will be added together to obtain the overall score for each Bidder.

#### **Table A - Schedule of Charges**

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

We require our suppliers and contractors to pay at least the Living Wage for the work.

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)**

<b>Cost</b>	<b>Post 1 @cost per day (No of days) e.g. Project Manager/ Director @ £500</b>	<b>Post 2 @cost per day (No of days) e.g. Senior Consultant/ manager/ researcher @£300</b>	<b>Post 3 @cost per day (No of days) Junior Consultant/ equivalent e.g. @£200</b>	<b>Total days</b>	<b>Total fees</b>
Inception meeting to agree plans and finalise requirements with the Fund	e.g. 0.5	1	1.5	3	850
<i>[Add as necessary]</i>					
<i>[Add as necessary]</i>					
<i>[Add as necessary]</i>					

<b>Cost Type</b>	<b>Value (£)</b>
<b>Sub - Total</b>	
<b>VAT</b>	
<b>Total*</b>	

\* (This must include all overheads and 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: CCB reserves the right to reject abnormally low tenders. CCB 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.*

*Please also indicate the inclusive day rate (or range of rates) if CCB wished to buy additional work over and above the contracted project.*

**Procurement Process**

CCB reserves the right to reject abnormally low tenders. CCB reserves the right not to appoint and to achieve the outcomes of the evaluation through other methods

The procurement timetable will be:

Tender return deadline: completed proposal to be returned to CCB by the end of **Monday 20 November 2017**.

Clarification meetings may be held with shortlisted consultants and would take place in London the week beginning **27 November 2017**

We will notify bidders of our procurement decision on the week commencing **11 December 2017**.

Your tender proposals must be sent electronically via e-mail before the tender return deadline of midnight on **Monday 20 November 2017** to the following contact:

Anne Locke  
Cathedrals Officer  
Cathedrals and Church Buildings Division  
Church House  
Great Smith St  
London SW1P 3AZ  
Phone: 020 7898 1862  
Email: [anne.locke@churchofengland.org](mailto:anne.locke@churchofengland.org)

Please visit the Churchcare website <http://www.churchcare.co.uk/cathedrals> for further information about the organisation.

## **Appendix: Accessibility and formatting guidance**

Reports and other documents 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 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
- 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**

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.

#### **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 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 the grant funders. Logos and wording will be supplied.