



Invitation to Tender

Evaluation of Digital Campaign

Ref: NHMF 0320

Schedule 2: Specification

1 Background:

Overview

The National Lottery Heritage Fund, formerly the Heritage Lottery Fund (HLF), is an operating name for the Trustees of the National Heritage Memorial Fund (NHMF). In 1994 the NHMF was given authority under the National Lottery Act to distribute money raised by the National Lottery to support projects involving the national, regional and local heritage of the United Kingdom. In January 2019 we launched our current Strategic Framework: 'Inspiring, leading and resourcing the UK's heritage'. See the Heritage [Fund's website](#) for more details.

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. This is reflected in the outcomes for heritage, people and communities which underpin our grant-making.

Our Digital Skills for Heritage initiative is designed to raise digital skills and confidence across the UK heritage sector. Our **£3.5million** Digital Skills for Heritage initiative is designed to help them thrive. Since launching in 2020, we have supported **65 projects** through activities and resources designed to reflect the varying needs, locations, sizes and levels of digital experience of heritage organisations. You can read more [here](#)

The Heritage Fund is looking to appoint a company to provide evaluation services in relation to the Digital Skills for Heritage initiative and our requirements, including aims and objectives, are detailed more fully in the rest of this specification but the main aim is for a contractor to provide the following:

Across all funding tranches, we want to know:

- What effect has our funding had?
- What has the funding enabled?

We will use the results of this evaluation to continue our promotion of the value of digital skills to the Heritage Sector. We will also use the results to inform our future digital skills support through our new Strategic Funding Framework.

The Digital Skills for Heritage initiative had a number of tranches, which are detailed below.

Tranche 0 – Admin (five projects)

Provided essential digital guides and external webinars on key topics to support organisations moving online during the pandemic, including safeguarding, security and privacy and accessibility.

Tranche 1 – Raising Confidence (two projects)

Raising Confidence provided a Digital Help Desk for small and volunteer-driven heritage organisations getting to grips with using technology for the first time. Support was provided for heritage organisations with low levels of digital skills and confidence, and effectively providing this group with opportunities to develop their knowledge of how they can effectively make use of digital.

Both projects are now closed.

Tranche 2 – Taking Digital Forward (three projects)

Taking Digital Forward focuses on hands on training, events and activities [Two initial projects](#) Lottery funded projects completed in September 2021. Cultural Recovery Funding from DCMS has supported a [third T2 project](#), providing free events, activities and workshops focusing on digital business skills to the heritage sector. This third project was due to complete at the end of October 2022.

Tranche 3 – [Digital Confidence Fund](#) (23 projects)

22 organisations in our 13 [Areas of Focus](#) each received a £10K grant and £2,500 worth of 1:1 digital consultancy mentoring support through our Registry of Support Services (RoSS). The projects started in June 2020. 17 projects now complete and the remaining five projects are due to complete by November 2022.

Tranche 4: Leading the Sector (two projects)

Leading the Sector is designed to promote and develop digital leadership across the heritage sector. The first [Leading the Sector course](#) ran until September 2021, supporting 16 senior leaders from medium to large heritage sector organisation from across the UK. [Part two of this tranche](#) will run a series of six online, and Six in person digital leadership events between October 2021 and November 2022.

Tranche 5 – Answering the sectors Digital questions (three projects)

[Answering the Sectors Questions](#) has funded the development of a [Digital Heritage Resource Hub](#), providing answers and supporting resources for the sectors top 100 most pressing digital questions. The tranche has received both Lottery and DCMS Cultural Recovery funding and is due to complete in November 2022.

Tranche 6 – The Digital Attitudes and Skills for Heritage (DASH) Survey (two projects)

The DASH survey provides the first ever benchmark of the UK heritage sectors digital skills and attitudes, and provides a UK wide analysis of the heritage sectors use of digital, including recommendations for organisations, funders and government. 4,120 staff, trustees and volunteers working at 281 heritage organisations completed the survey and the [first report was released in September 2020](#). The [Second DASH Survey](#) report, published in January 2022, brings together the responses of 4,514 individuals from 323 organisations.

Tranche 7 – Connected Heritage (eight projects)

[Connected Heritage](#) is primarily funded by DCMS Cultural Recovery Funding and enables eight organisations to build network capability and make use of technology for collaborative practice. Projects are designed to provide exemplars for the sector.

Tranche 8 – Digital Volunteering (17 projects)

[Digital Volunteering](#) has supported 17 organisations and partnerships across the UK with the aim of creating new digital volunteering roles, and provide information and resources to allow other organisations to adopt similar approaches.

1 Aims & Objectives:

The aim of this evaluation is to provide evidence of the effectiveness of the Digital Skills for Heritage initiative by understanding the value added by The National Lottery Heritage Fund funding and wider support for building digital skills and confidence across the sector.

The evaluation will address the following questions:

- How have the combined outcomes of the tranches contributed to the Digital Skills for Heritage initiative?
- What factors contributed to their achievements and identify any that can be replicated for future success?
- What lessons have been learned, including what worked well and what worked less well?

The evaluation will need to

- Understand any motivators and challenges organisations are facing in relation to improving their digital capabilities
- Assess the reach of the campaign, particularly with respect to all the heritage domains we support, and across the United Kingdom.
- Assess if we can ascertain if the Digital Skills for Heritage initiative was successful in improving levels of digital skills and confidence.

We are particularly keen to see what this was like for small and medium sized organisations.

2 Method of Delivery:

We welcome creative suggestions for how we might maximise the value of this work and the contribution from the consultants, especially in terms of identifying learning for the Heritage Fund across the different tranches.

We would like the successful bidder to synthesise the learning from the funded tranches so we can make an overall judgement on the Digital Skills for Heritage initiative. To facilitate this we will make available the following documents to the successful bidder.

- Individual project final reports, where projects are complete
- Digital Skills for Heritage initiative wide – two year report completed in March 2022
- Tranche 1 Raising Confidence report
- Tranche 3 report completed in March 2022

The successful bidder may also want to include the two DASH surveys as part of their background research.

[First DASH survey report](#)

[Second DASH survey report](#)

We expect the successful bidder to engage with Heritage Fund staff as well as representatives from funded and applicant organisations. You may wish to consider including organisations/individuals who might be relevant but have not previously applied for digital funding.

Bidders should include a comprehensive data gathering and analysis phase covering all outputs held by the Heritage Fund, in order to build an overall picture of activities delivered to date and make an assessment of the impact. The successful bidder will need to liaise closely with Heritage Fund staff to help source the information for this.

We anticipate the successful bidder will want to sample a number of organisations from the different tranches and we can help facilitate this.

We expect the findings to inform future strategies hence the final report should draw conclusions on our progress and how we might continue to support digital capabilities in the heritage sector.

3 Outputs, Outcomes, & Deliverables:

The deliverables of the evaluation should include the following:

- A draft report which should include findings from the primary research activities.
- A comprehensive final report (executive summary, detailed methodology, findings) in a ready to publish electronic format.

The report will need to adhere to our accessibility requirements.

We are open to the format used to present the final report. However the report package should include the following:

- An executive summary for Executives and Board members, and for external use, in an electronic format
- A summary focused on Grant in Aid (T2, T5, T7) to enable the Heritage Fund to report the impact of the Cultural Recovery Funding to DCMS.
- Lessons learnt for internal use.
- Headline impact statistics and data for use by our MarComms department (infographics/social media use)
- An English and Welsh language version of the report.

We will require original content created for the commission for the external report to be shared by the rights holder under our default open licence (CC BY 4.0).

The timetable is as follows:

Start date: 19/12/2022

Completion of research: 15/03/2023

Report publication date: 31/03/2023

Attached Appendices

Appendix I - Accessibility and formatting guidance

Appendix II – How the Fund Works