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**Invitation to Tender**

**Evaluation of Digital Skills for Heritage Initiative**

**Ref: NHMF 0324**

**Schedule 2: Specification**

# 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 a Strategic Framework: ‘Inspiring, leading and resourcing the UK’s heritage’ which relates to the scope of this evaluation. On the 2nd March 2023 we launched our new strategy ‘Heritage 2033’. See the Heritage [Fund's website](https://www.heritagefund.org.uk/publications/strategic-funding-framework-2019-2024) for more details. 

The Heritage Fund invests in the full breadth of the UK’s heritage and our new 10-year strategy sets out a vision for heritage that is valued, cared for and sustained for everyone’s future. . This is reflected in the investment principles which underpin our grant-making.

Our £4.1M Digital Skills for Heritage initiative is designed to raise digital skills and confidence across the diverse UK heritage sector. Since launching in 2020, we have supported 70projects 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](https://www.heritagefund.org.uk/our-work/digital-skills-heritage)

The Heritage Fund is looking to appoint an independent organisation 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. The main aim is for a contractor to provide answers to the following:

• What effect have our digital campaigns and funding had?

• What have the digital campaign and 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

The Digital Skills for Heritage initiative consists of 70 thematically clustered projects across five areas. These are

* Sector-wide digital skills training and online learning opportunities, particularly for small and medium sized heritage organisations.
* Digital capacity building for low confidence organisations.
* Digital strategy and leadership development, particularly for large organisations.
* Research, including benchmarking the sectors digital confidence and skills.
* Exemplar cohort projects, designed to establish new ways of working with digital.

The successful supplier will be provided with records of the initiative to date to advance their research planning and groundwork. These include an overview of all projects, carried out in 2021; a specific overview of progress made by organisations in the initiative new to digital; two overview reports of exemplar cohort projects establishing new ways of working; a wide range of project evaluation documents and engagement numbers; as well as the two DASH sector surveys providing a digital skills benchmark for the sector.

# 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:

● What have been the outcomes of the Digital Skills for Heritage initiative and how have the individual tranches contributed to these?

● 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

* 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.
* Understand any motivators and challenges organisations are facing in relation to improving their digital capabilities following participation in the initiative.

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

# 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. By relying on the principle of what works, for whom, in what context will allow the evaluation to explore how the initiative made an impact with different groups. Bidders are asked to identify their proposed methodology for achieving the evaluations objectives.

We have catalogued the documents we can make available (outlined below). Please do consider how they can aid your understanding of the initiative and how you can draw on them to supplement data collection.

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **Tranche** | **No of Projects/ Commissions** | **Funding Call/Brief** | **End of project reports** | **Tranche wide report** | **Other supporting resources** | |
| **T0** | Commissions for essential sector guides, webinars and events to support organisations as they moved online. | | | | | |
| 11 projects, all complete |  |  |  | Midpoint initiative wide report completed 03/22 |
| **T1** | Support for small and volunteer led organisations with low levels of digital skills and confidence. | | | | | |
| 2 projects, all complete | 1 | 2 |  |  |
| **T2** | A free programme of training, workshops, events and resources for small, medium and volunteer driven heritage organisations to develop digital capabilities across a range of areas. | | | | | |
| 3 projects, all complete | 1 | 3 |  |  |
| **T3** | Grants and digital mentoring support for organisations in our 13 Areas of Focus to support the deliverer digital projects or projects with a digital element. | | | | | |
| 22 projects, 20 complete | 1 | 19 | 1 completed 03/22 |  |
| **T4** | Events and briefings to promote and develop digital leadership across the heritage sector, targeted at senior leaders from medium to large heritage organisations. | | | | | |
| 2 projects, 2 complete | 2 | 2 |  |  |
| **T5** | Online resource hub answering the sectors top 100 digital heritage questions and providing comprehensive resources and case studies. | | | | | |
| 3 projects, 2 complete | 1 | 2 |  |  |
| **T6** | A two stage survey to provide a benchmark of the sectors digital skills and attitudes, providing UK wide analysis of the heritage sectors use of digital, including recommendations for organisations, funders and government. | | | | | |
| 2 projects, all complete | 2 | 2 DASH reports |  |  |
| **T7** | Grant funding to enable organisations to build network capability and make use of technology for collaborative practice. | | | | | |
| 8 projects, 1 complete | 1 | 1 | 1 completed 03/22,  1 due 04/23 |  |
| **T8** | Grant funding for organisations or partnerships to creating new digital volunteering roles, and provide information and resources to allow other organisations to adopt similar approaches. | | | | | |
| 17 projects | 1 |  | 1 completed 04/23 |  |
| **Total** | 70 | 10 | 31 | 3 | 3 | |

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 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 outcomes. 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.

# Outputs, Outcomes, & Deliverables:

The deliverables of the evaluation should include the following:

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• 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. Tables should be used for presenting rows and columns of data, not for layout, and column and row headers should be explicitly identified. Charts created in Excel should be embedded in Word as an object. We cannot publish reports that are not in an accessible format. Responsibility for making reports accessible lie with the service provider.

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: 26th June2023

Completion of research: 15st January 2024

Report submission date: 31st January 2024

Attached Appendices

Appendix l - Accessibility and formatting guidance

Appendix ll – How the Fund Works