Parks for People Programme Evaluation

**Organisation Heritage Lottery Fund and Big Lottery Fund**

**Department** Strategy & Business Development

**Title of procurement Parks for People**

**Brief description of supply** Evaluation Service

**Estimated value of tender** £60,000 including expenses, venue hire and VAT

**Estimated duration** February 2019 to July 2020

**Name of HLF Contact** Asimina Vergou

 Evaluation Manager

 Asimina.vergou@hlf.org.uk

**Timetable** Response deadline:

 11.00 am on 28 January 2019

 Clarification questions deadline:

 14 January 2019

Clarification & Negotiation meetings:

 8 February 2019

Confirmation of contract:

Week commencing 11 February 2019

Inception meeting:

15 February 2019

Completion of evaluation:

July 2020

# 1. Overview

* 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 current Strategic Framework: ‘A lasting difference for heritage and people’. See the [HLF website](http://www.hlf.org.uk/aboutus/whatwedo/Pages/StrategicFramework2013to2018.aspx) for more details.
	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 which underpin our grant-making.
	3. The Big Lottery Fund (BLF) ensures money raised by players of [The National Lottery](https://www.national-lottery.co.uk/) helps communities to achieve their ambitions and thrive. BLF does this by awarding grants, bringing communities together, and sharing learning with communities, other funders and the government.
	4. BLF funds projects and activities that make communities stronger and more vibrant, and that are led by the people who live in them. BLF supports charities, community groups, and people with great ideas - local or national, large or small. We also bring people and groups together: to share experiences, learn from each other and try new ways of working.

**Our purpose**

We support people and communities to thrive.

**Our strategic framework**

When people are in the lead, communities thrive.

People understand what’s needed in their communities better than anyone. We listen, collaborate and fund so that good things happen.

That’s why we are proud to award money raised by National Lottery players across the UK. For more information about our goals and our principles, please see the [BLF website](https://www.biglotteryfund.org.uk/about/strategic-framework).

* 1. Since 1994, HLF (in conjunction with BLF for part of this period) have awarded grants totalling over £900m to more than 900 public parks in the UK. Parks for People (PfP), which was set up in 2006, has been a flagship targeted programme for parks funding and to date has funded approximately £872m to c.650 projects. In England the programme was jointly funded with BLF. The programme aims to regenerate public parks and cemeteries of national, regional or local heritage value for the enjoyment and recreation of local people.
	2. Currently, within PfP, £200m projects are still in delivery. The programme is now closed and by 2025 we expect all PfP projects to finish. The programme awarded grants of between £100,000 and £5 million to revitalise historic parks and cemeteries.
	3. PfP was a partnership type of funding, where projects less than £1m were required to contribute at least 5% of project costs, and projects of £1m or more were required to contribute at least 10% of project costs. The funding covered various costs including new staff, extra hours for existing staff, trainees’ costs, professional fees, capital work, activities to engage people with heritage, evaluation, promotion and extra organisational costs. The application process was in two rounds (development phase and delivery phase).
	4. PfP grants have been expected to deliver the following outcomes:

**Outcomes for heritage**

With our investment, heritage will be:

* better managed (weighted outcome)
* in better condition
* better interpreted and explained
* identified/recorded

**Outcomes for people**

With our investment, people will have:

* developed skills (weighted outcome)
* learnt about heritage
* volunteered time

**Outcomes for communities**

With our investment:

* your local area/community will be a better place to live, work or visit (weighted outcome)
* environmental impacts will be reduced
* more people and a wider range of people will have engaged with heritage.
	1. PfP is a targeted programme that sits concurrently with other initiatives that HLF/BLF have been involved in to help parks face some big challenges. These include [Rethinking Parks I and II](https://www.nesta.org.uk/project/rethinking-parks/), [Future Parks Accelerator](https://www.hlf.org.uk/about-us/news-features/landscapes-parks-and-nature/parks), [A Natural Capital Account for London](https://www.london.gov.uk/what-we-do/environment/parks-green-spaces-and-biodiversity/green-infrastructure/natural-capital-account-london?source=vanityurl) and State of UK Public Parks reports [2014](https://www.hlf.org.uk/state-uk-public-parks-2014) and [2016](https://www.hlf.org.uk/state-uk-public-parks-2016). Collectively all these initiatives are particularly crucial in the current climate where parks are under direct threat. Based on the State of UK Public Parks 2016 report despite the value that communities attribute to their local parks, parks managers across the UK report continuous reduction to their maintenance budgets, cuts to their revenue budgets, staff and skills being lost and parks declining in condition expected to rise.
	2. Between 2007 and 2017 through a monitoring and evaluation framework set up by consultants, PfP projects have been supported to collect a range of common types of data to demonstrate progress against outputs and outcomes. The process has highlighted the need for further capacity building in the sector to collect robust evidence of the impact of parks. [The Parks for People Interim and Impact Evaluation reports include more details on this approach to collect evidence in the PfP.](https://www.hlf.org.uk/parks-people-evaluation)
	3. We are now looking to commission a PfP programme evaluation which captures in a more in-depth way the impact of PfP. The ambition of this evaluation proposal is threefold:
* Firstly, through in-depth case studies, the evaluation will bring to light evidence of the long term impact and value of the National Lottery Parks for People programme in enhancing parks and their local areas in the UK. The work will provide evidence of how properly funded parks contribute to current government agendas and areas of work such as health, environment, culture.
* Secondly, the evaluation will provide best practice examples of environmental and financial sustainability and resilience in public parks to inspire those who should be investing in parks in future.
* Thirdly, the evaluation will provide intelligence to guide strategic support from local and central government to support effective decision-making to ensure that future investment in parks and urban green space by the National Lottery, local authorities, Government and other funders will deliver environmentally and financially sustainable public parks and green spaces.
	1. The primary audiences for the report(s) are decision makers related to the parks sector in central and local government, National Lottery Funders and other funders with the potential to support parks in the future. Reports will be made available on the HLF and BLF websites and disseminated through various channels to maximize reach and influence. We would also like the evaluation to contribute to the wider body of knowledge related to the impact of parks in society.

# Evaluation aim and questions

* 1. The aim of the evaluation is to evidence and demonstrate the societal, long-term impact of HLF and BLF funding in parks in relation to current governmental agendas such as health, culture and the environment and make the case for further strategic central and local government support and future investment by other funders for the regeneration and environmental and financial sustainability of public parks and green spaces.
	2. More specifically the evaluation will answer the following questions:
		1. How does access to good quality historic public parks supported by HLF and BLF benefit society in relation to key governmental agendas? Including:

**Civic action/community participation (DCMS)**

* How has the community been engaged with parks in different levels, from consulting to having a stewardship role and taking ownership and what difference has this made?
* What different models of successful community engagement emerged in PfP projects?
* Who has benefitted from the PfP funding, what has been successful for different groups and why?
* How has PfP funding helped overcome barriers to broaden the use of parks?

**Health and Wellbeing, including addressing health inequalities (Department for Health and Social Care)**

* To what extent has PfP funding contributed to increasing local communities’ health and wellbeing?
* What PfP funded activities have contributed to increasing local communities’ health and wellbeing?

**Loneliness and social integration (MHCLG)**

* To what extent and how has the PfP funding contributed to addressing loneliness and social integration?

**Environment (DEFRA)**

* To what extent and how has PfP funding enabled different local community groups connect to nature?

**Economic regeneration (DCMS)**

* To what extent and how has PfP contributed to economic regeneration in the local community?
	+ 1. What have been the main factors contributing to the success of a PfP project?
		2. How sustainable has the investment been and what has contributed to the sustainability?
		3. What would have happened in the parks/places around parks without the intervention? What is the impact of not investing in parks?

# Methodology

A methodology for the work is open for consultants to propose. However, we anticipate that the study will include the following:

* 1. Rapid review looking at the current published credible UK based evidence of the impact of the parks in the society, linked to the aim and evaluation questions. This rapid review will aim to share evidence with the government to help inform the upcoming comprehensive spending review. We expect the rapid review to also inform the study design.
	2. Four in-depth case studies of funded PfP projects, one situated in Scotland and three in England. The case study methodology will involve collecting primary data of the social/environmental/economic impact of the funding in relation to governmental agendas. The fieldwork will include collecting data from people involved in the projects (park managers, volunteers etc.), stakeholders, general public, businesses, local authorities.
	3. The case study data collection methods may include surveys (e.g. surveys to the local communities such as the ALVA and Ipsos Mori wide population surveys), individual interviews and focus groups, site visits and observations etc.
	4. Secondary data e.g. from projects’ documentation such as evaluation reports and surveys, local area statistics etc. will be also analysed.
	5. The case studies will be chosen based on a list of criteria to be discussed with the successful bidder e.g. representing a different type of park, representing a different type of local community, successful project in terms of achieving sustainability and resilience, long-ago completed projects and projects just completing etc.
	6. Two counterfactuals will be also selected to compare what would have happened if there were no funding given to the particular parks. The counterfactuals could be selected by looking at a park close by to a case study park which didn’t receive funding. The counterfactual could be a park that applied for PfP funding and wasn’t successful. Details on the selection criteria for the counterfactuals will be also discussed with the successful bidder.

# Outputs

* 1. The following outputs will be required:

A project plan with specific deliverables\* and timetable will be agreed with the successful consultant/ies. However, HLF and BLF expect the following deliverables in accordance with the following timetable as a minimum:

| **Deliverable/Key Milestones\*** | **Due date** |
| --- | --- |
| Inception Meeting to agree plans, including reporting structures, and a communication and dissemination strategy. | 15th February 2019 |
| A rapid review, of 20 pages maximum, on current evidence of impact of parks, including one page summary of findings and recommendations and infographic. | 31st March 2019  |
| Draft structure of the final report  | July 2019 |
| Regular contact/meetings for the evaluator to update HLF/BLF in relation to their work and emerging findings | To be agreed at the inception meeting |
| A final report, of 50 pages maximum, with in-depth case studies and recommendations for government, National Lottery, other funders and other sector stakeholders. Structure to be agreed with HLF and BLF. | July 2020  |

The above represents our minimum requirements.

\* HLF and BLF reserves the right to amend this timetable where required.

* 1. All reports must adhere to HLF’s accessibility and formatting guidance (appended).
	2. The initial findings will be confidential to HLF and BLF. HLF and BLF may prepare or commission summary reports and other materials for subsequent wider distribution, based on the results.
	3. All reports to include appendices as agreed between HLF and BLF 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. The successful bidder will be expected to discuss and present findings at appropriate times, to internal and external audiences. 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.
	6. 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 February 2019 and be completed by July 2020. The final report shall be submitted to HLF and BLF by mid July 2020.
	2. The anticipated budget is £60,000 to include all expenses and VAT. The contract will be led by the National Heritage Memorial Fund.
	3. Payments will be made in three instalments. The first payment will be made upon signing of the contract and inception meeting to cover the costs of the rapid review. Provided the quality of the rapid review is good, the second payment will be made upon HLF and BLF’s receipt of an approved copy of the review. The third and final payment upon HLF and BLF’s receipt of an approved final copy of the report in July 2020.
	4. The contract will be based on the HLF standard terms and conditions.
		1. Earlier termination of the Contract by the HLF and BLF (break clause): the HLF and BLF shall have the right to terminate the Contract at the end of March 2019 if, following a formal review, it is determined by HLF and BLF that the 1st phase has not resulted in a good quality rapid review. The quality of the rapid review will be agreed at the beginning of the contract.
	5. The evaluation will be managed on a day to day basis for HLF by Asimina Vergou.

# Award Criteria

* 1. A proposal for undertaking the work should be maximum 15 pages and include:
* a detailed methodology for undertaking the evaluation separating clearly the rapid review and the case study aspects of this work;
* 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 separating clearly the rapid review aspect from the case study.
	1. Your Bid will be scored out of 100%.

**80% 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 HLF and BLF against the following Quality Questions which become 80% of the total score:

| **Demonstration/Quality questions** | **Weighting** |
| --- | --- |
| 1. To what extent does the tender response demonstrate a clear understanding of the aim, questions, and main issues related to this evaluation including the parks policy context?
 | Weighing 5% |
| 1. To what extent does the tender response demonstrate a clear plan and relevant experience in conducting the rapid review?
 | Weighting20% |
| 1. To what extent is the proposed case study methodology (including data collection and analysis) robust and appropriate to fulfil the evaluation aim and answer the evaluation questions?
 | Weighting20% |
| 1. To what extent does the tender response demonstrate the Bidder has experience and/or capacity of evaluating projects in most of the following areas: parks, community engagement, regeneration, wellbeing, people’s connections to nature?
 | Weighting15% |
| 1. To what extent does the tender response demonstrate the bidder’s experience in producing high quality research/evaluation that has influenced policy and high quality accessible outputs?
 | Weighting15% |
| 1. To what extent does the tender response demonstrate a clear and realistic project plan, showing phases of the evaluation, tasks for each phase, roles and responsibilities for each member of the team and managing risk and quality?
 | Weighting20% |
| 1. How well has the Bidder structured an evaluation team in order to successfully manage the contract and deliver the required work to the budget and timetable required by HLF and BLF?
 | Weighting5% |

**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 HLF and BLF 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 HLF and BLF confidence in the ability of the Bidder to deliver the contract. Meets the HLF and BLF’s requirements. |
| 4 | Very good | Response is comprehensive and supported by a high standard of evidence. Gives the HLF and BLF a high level of confidence in the ability of the Bidder to deliver the contract. May exceed the HLF and BLF’s requirements in some respects.  |
| 5 | Excellent | Response is very comprehensive and supported by a very high standard of evidence. Gives the HLF and BLF a very high level of confidence the ability of the Bidder to deliver the contract. May exceed the HLF and BLF’s requirements in most respects. |

**20% 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 20%

* 20 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 20% (full marks) for price and the second placed bidder gets 18.4% and so on. (8/100 x 20 = 1.6 marks; 20-1.6 = 18.4 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/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 your 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 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:* HLF and BLF reserve the right to clarify quality and prices and to reject tenders that demonstrate an abnormally low quality response. HLF and BLF 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. HLF rand BLF reserve the right to reject abnormally low scoring tenders. HLF and BLF reserve the right not to appoint and to achieve the outcomes of the research/evaluation through other methods.
	2. The procurement timetable will be:
* Deadline for clarification questions: 14 January 2019
* Tender return deadline: 11.00 am on 28 January 2019
* Clarification meetings\*\* may be held with shortlisted consultants and would take place on: 8 February 2019
* HLF and BLF will notify bidders of our procurement decision week commencing:

11 February 2019

* Inception meeting: 15 February 2019

\*HLF will upload response to clarification on our website, [here](https://www.hlf.org.uk/about-us/corporate-information/transparency/tenders).  Please note that we will make the anonymised questions, and our responses to them, available to everyone on the HLF 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 HLF, BLF’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 11.00 am on 28 January 2019to the following contact:

Asimina Vergou

Heritage Lottery Fund

Holbein Place

London

SW1W 8NL

asimina.vergou@hlf.org.uk

* 1. Please visit the [HLF website](http://www.hlf.org.uk/Pages/Home.aspx) for further information about the organisation.

# Appendix: Accessibility and formatting guidance

HLF and BLF are 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 HLF and BLF (**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 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](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 HLF and BLF. Our logos can be found on the [HLF website](http://www.hlf.org.uk/grantholders/acknowledgement/Pages/Logosandacknowledgement.aspx) and [BLF website](https://www.biglotteryfund.org.uk/funding/funding-guidance/managing-your-funding/grant-acknowledgement-and-logos).

**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 HLF and BLF**

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.

HLF and BLF retains the right to amend documents in order to create accessible versions for publishing.