

Calderstones Evaluation Plan

Evaluation Brief

21st June

Project background

Since 2008, The Reader has pioneered the use of *Shared Reading* to improve well-being and reduce social isolation in some very diverse communities. We inspire and support people to read great literature aloud together. This simple-sounding model supports stronger and more supportive communities by improving emotional wellbeing. This year we will deliver 400+ regular weekly groups, which will take place in settings ranging from cafes to care homes, from NHS wards to community libraries and from foster placements to work places. Key outcomes include increased confidence, sense of purpose and social connection.

We have been based at the Calderstones Mansion since September 2014, when we signed a 125-year lease with Liverpool City Council. Since then we have opened The Reader Café, The Reader Ice Cream Parlour and our interactive children's story centre The Storybarn, and have welcomed thousands of visitors of all ages to enjoy regular *Shared Reading* groups, exhibitions, heritage tours, outdoor theatre productions and many special events.

We are currently undertaking an ambitious £5m redevelopment, supported by the Heritage Lottery Fund, Liverpool City Council and other private funders, to transform our headquarters into our International Centre for Shared Reading. We are creating a community hub that will bring *Shared Reading* groups, heritage, nature and social enterprise together. Sustainable, community focused solutions that improve mental wellbeing, reduce social isolation and keep people well are needed more than ever before. The need for community based assets like Calderstones is clear and growing.

Created by an army of volunteers, a vibrant programme of regular weekly activities and stand out annual events at Calderstones will provide many opportunities for people from diverse walks of life, with diverse needs to come together, engage and mix with one another.

Calderstones will re-open to the public in Spring 2019 when we will launch a major community activity programme as well as a series of new social enterprise ventures including an expanded café, a heritage offer, a small gift and book shop, a theatre programme and events.

Evaluation work

We already have a comprehensive system for monitoring and evaluating our members' participation in *Shared Reading* including systems that allow us to measure and report on the impact *Shared Reading* has on the lives of group members and volunteers. Over a number of years independent research projects have demonstrated the value and impact of our work. We also use a range of feedback mechanisms to ensure we are constantly improving our practice and systems and have secured investment into our digital infrastructure with a view to improving and streamlining the data collection we currently undertake from our shared reading groups.

Whilst based on *Shared Reading*, our work at Calderstones will also include participation in a much more diverse range of activities and will necessitate a need to measure a range of metrics that we haven't collected before (e.g. footfall at the Mansion House and across the whole park site) as well as outcomes and impacts from these activities.

We will need to develop new processes for systematically collecting, collating, processing and reporting on this data with due regard for data protection legislation. The outputs data collected will need to feed into our existing CRM “Microsoft Dynamics” and may necessitate the development of bespoke modules in addition to those that are already available. The output from this piece of work would therefore, if necessary, inform a specification for new CRM modules to fit inside our existing structure (the scope of this brief does not include module design).

We need to establish an *Outputs and Impact Reporting Plan* that will help us to:

- hold ourselves accountable to our targets and values
- help us understand the impacts of the project on our beneficiaries
- ensure a high quality experience for all our stakeholders
- fulfil the expectations of our funders
- embed timely recording of activities within daily practice from the outset
- shape operational decision-making and see its impact
- generate regular, reliable data to share with stakeholders and potential future funders

Scope of this work

We have already undertaken a review of the data that we envisage that we will need to collect which brings together the requirements from all of our funders, the information that we anticipate that we will need to support effective decision making and to be able to demonstrate the value and impact of Calderstones. This framework has identified the following areas (not totality):

- 1) *Shared Reading* – number of groups/ number attendees, impact of *Shared Reading* using existing frameworks and measures
- 2) Heritage – numbers of events, numbers of people participating, impact on people’s understanding and connection to local heritage
- 3) Well-being – number and type of sessions, numbers of people participating, impact on people’s wellbeing
- 4) Footfall – number unique visitors, number of visitors from areas of deprivation, visitors from local/ national/ international
- 5) Economic Impact – business bookings, site incomes, FTEs, jobs, apprenticeships, visitor spend
- 6) Volunteers – personal impact of volunteering, volunteer numbers, number of hours given, demographics,
- 7) Digital – numbers of times digital archive accessed
- 8) Events – e.g. Instances of room hires, theatre events, children’s events, room hires, event attendees
- 9) Schools – number of school visits / students/ engagements
- 10) Beneficiary/ visitor profile and demographics - Number of unique people from targeted beneficiary groups participating in regular activities
- 11) Visitor experience feedback as well as snapshots of economic impact of that visit. E.g. travel distance, spend (on site and in locality), other destinations etc.

Impact

A range of surveys, questionnaires and interviews will be needed to assess the impact of taking part in sessions or visiting Calderstones using a range of measures designed to assess social isolation, well-being, skills etc. We will use our experience and frameworks developed for our *Shared Reading* work to inform this development but some refinement, particularly on the best mechanisms and means of collecting this data, will be necessary.

Benchmarking

We need to establish some baseline measures around who we are currently reaching at Calderstones including numbers and demographics as well as measures to help us determine the level of awareness of the International Centre for Shared Reading.

We now need some expert advice to:

- Review our current thinking and draft framework in the context of other similar organisations / experience advising us on elements that we have not yet considered and the appropriateness of the proposed data collection methods and time points.
- Revise, update and finalise the outputs, outcomes and impact measurement strategy for Calderstones ensuring that the requirements from key project funders, in particular Heritage Lottery Fund, Arts Council England and Liverpool City Council are met in full.
- Undertake data benchmarking now, prior to building completion to establish a baseline for key data items.
- Develop data collection tools and embed a system for us to data collect in house in future years.
- If required, a recommended specification for CRM development of new module to incorporate collected data into our existing system

Summary of output required

- a) Finalised evaluation strategy that meets the needs of The Reader and all evaluation obligations for partners and funders.
- b) Baseline data collected and collated in a report for key measures.
- c) A data collection system and handover that we can repeat in future years.
- d) An outline specification for digital development that may be required

We are looking particularly for experience in designing systems to collect outputs e.g. footfall, visitor numbers, economic impact, which will be particularly beneficial to complement the existing skills and experience of the team.

Budget

The Reader is looking for a partner who can work with us to deliver this work to a maximum budget of £6,500 (incl VAT). Please provide a whole project fixed fee with any relevant day rates. Please quote inclusive of VAT, any anticipated expenses and all outputs. We would expect client meetings to take place in Liverpool.

Submission timelines and guidelines

- Submissions by - 12 noon 9th July 2018
- Interviews: 25th July 2018
- Contract start date: 6th August 2018
- Contract end date: 30th September 2018

Please provide a short proposal outlining your relevant experience and your approach.

Please include

- Estimated timeline and task plan for delivery
- An introduction to your team
- Previous demonstrable experience on a project of a similar type and budget delivered to a high standard
- Evidence that your organisation is a responsible and ethical practice with values in alignment to that of The Reader
- How your organisation's data protection policies comply with current legislation
- Full contact details of two references from previous third sector/community focused clients

Contact

If you have any questions about this opportunity, please contact Ailsa Horne (Associate Director – Development) at ailsahorne@thereader.org.uk or telephone 0151 729 2200.