**Great Place Nations Programme Evaluation**

**Organisation Heritage Lottery Fund**

**Department** Strategy & Business Development

**Title of procurement Great Place Nations**

**HLF Finance No. HLF 229**

**Brief description of supply** Evaluation Service

**Estimated value of tender** £40,000 including expenses, venue hire and VAT

**Estimated duration**  May 2018 to March 2021

**Name of HLF Contact** Asimina Vergou

 Evaluation Manager

 asimina.vergou@hlf.org.uk

**Timetable** Response deadline:
11.00 am on 16 April 2018

Clarification questions deadline:
29 March 2018

Clarification meetings:
Week commencing 23 April 2018

 Confirmation of contract:
Week commencing 30 April 2018

Completion of research:
March 2021

# 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. Now closed to applications, our newest grant programme, the Great Place Scheme, puts culture and heritage at the heart of the local vision and ambition for communities by enabling strong new partnerships between the heritage, civic and community organisations and other local agencies. It envisages to help create better places to live and work: in short to make culture and heritage central to regeneration and successful communities. <https://www.greatplacescheme.org.uk/>
	4. Great Place Scheme is a strategic funding programme that builds on the principles of ‘[networked heritage](https://medium.com/networked-heritage)’[[1]](#footnote-1). By strengthening the connections between heritage, civic and community organisations, and the private sector, by involving people, projects will enhance the role that heritage and culture plays in the future of each place participating in the Scheme. In time this will lead to the social and economic benefits that heritage and culture can achieve, including tackling poverty and inequality, improved resilience for local organisations, and inclusive growth in the local economy, amongst others.
	5. The aim of the Great Place Scheme is to enable heritage and cultural organisations to make a step-change in how they work together, and with organisations in other sectors, in order for heritage to contribute more to meeting local social and economic objectives.
	6. The ambition of the programme is to support places to:
* Inspire a vision of how heritage and culture can change their place
* Connect heritage and culture with new partners to help change places for the better
* Incorporate a vision for heritage and culture into ambitions for their place
* Build and share learning
	1. The Great Place Scheme is running in England, Scotland, Wales and Northern Ireland (NI). In England, the Scheme is running in collaboration with Arts Council England and Historic England. The Great Place Scheme in England opened in August 2016. In March 2017 a total of £20million was awarded to 16 places. The grants are ranging between £500,000 and £1,500,000 and grantees now have three years to complete their projects. A consultant has already been appointed in June 2017 to evaluate the programme in England.
	2. This brief regards the evaluation of the Great Place Scheme in Scotland, Wales and NI. This part of the scheme is being run solely by HLF. In all three countries grants are ranging between £100,000 and £500,000 for activity to be delivered over a period of up to three years. This is a match funding scheme and grantees are requested to have a minimum cash contribution of 10% of total project cost.
	3. The Great Place Scheme in Scotland opened in March 2017. In December 2017 a total of £ 2.45million was awarded to nine places. The Great Place Scheme in Wales opened in May 2017, with a total of £ 1.6million awarded to five places in March 2018. The Great Place Scheme in NI opened in June 2017 and decisions will be announced in March 2018. Funding is available for two to four places across NI.
	4. We would like to understand what the value of the Great Place Scheme in Scotland, Wales and NI has been, what it has enabled organisations to achieve, and whether there are new or different findings from these cohorts of grantees which can add to our knowledge of the value of place-making in the heritage sector.
	5. The primary audiences for the report(s) are heritage organisations and the wider heritage sector. We want to identify what is working well and why as grantees undertake their projects and to share the learning in real time with our grantees. Reports will be made available on the HLF website and circulated amongst all participating grantees. The report will also inform HLF’s Board of Trustees and support the development of future policy. We would like the evaluation to contribute to the wider body of knowledge related to place-making and welcome plans for contributing to this.

# Purpose of the evaluation

* 1. The aim of the evaluation is to assess to what extent the activity undertaken in the programme led to the desired outcomes, and how this occurred. Within this overarching aim we would like the evaluation to
* review the approach to delivery of the Great Place Scheme and identify its strengths and weaknesses
* identify lessons learnt and best practice for both national and local stakeholders in making change locally
* provide illustrative case studies on one project from each devolved nation, demonstrating the range of heritage activity and the role of this activity in achieving change in places and between devolved nations.

	1. The evaluation will answer the following questions:
1. What types of activities were undertaken by the successful Great Place Scheme grantees in Scotland, Wales and NI and how were they delivered on the outcomes of the programme?
2. To what extent did these activities and level of funding lead to the Great Place Scheme’s desired short and long term outcomes? In particular, that:
* Heritage and cultural organisations have built sustainable partnerships with other sectors, agencies and organisations in the place, and heritage and culture will be fully reflected in local plans and strategies
* Local areas and communities will experience inclusive growth, tackling poverty
* Inequality will be addressed and everyone will have the opportunity to experience and to be inspired by heritage and culture
* Heritage, cultural and other local organisations, will be more resilient
* Local areas and communities will be a better place to live, work or visit
1. To what extent did the Great Place Scheme directly lead to these outcomes? What other factors have either enabled or inhibited change?
2. How, if at all, did these outcomes vary between the devolved nations and between rural and urban places, within each devolved nation?
3. What has been the impact of the different government policy contexts in the three nations on the way that Great Place Scheme projects are created/delivered and on the types of partnership that arise?
4. What can we learn from the Great Place Scheme about how national development and delivery agencies in each devolved nation can best support change at a local level?
5. What can the wider sector and local stakeholders learn from the Great Place Scheme in the devolved nations about how to successfully embed heritage in place-making?

# Evaluation approach and methodology

* 1. A methodology for the work is open for consultants to propose. However, we anticipate that it will include some or all of the following:
* Primary data collection through fieldwork by evaluators (interviews, surveys etc.)
* The provision of support, guidance and tools to grantees to collect monitoring data for analysis at programme level. We expect that the first year of the work will focus on capacity building of the grantees so that they will collect reliable data to feed in the programme evaluation. Grantees are also expected to use these data in their final self-evaluation reports, so grantees will need to understand the relevance of data they are asked to collect to their individual projects.
	1. We expect detailed information and data to be collected from projects to develop a framework showing social and economic impact on Heritage, people and communities. The types of indicators this framework could include, but not be limited to, are:
	+ Visitor numbers and spend
	+ Audience profile
	+ Employment both direct and indirect
	+ Gross Value Added
	+ Purchases of goods and services
	+ Measures of increase in knowledge and understanding of heritage
	+ Measures of enjoyment, inspiration and creativity
	+ Development of personal skills and capabilities
	+ Health and quality of life improvements
	+ Social cohesion
	+ Social inclusion
	+ Measures of strengthened organisations
	+ Volunteers
	1. We require an evaluation which reviews activity across the breadth of the programme, and expect all grantees to be involved in some degree of fieldwork such as project document reviews, surveys, and interviews with leads and partners. However, given the place-based nature of this work, we expect that case study-based research in a small number of areas will be necessary to examine the local context and partnership working in more detail and in 360⁰. We expect a minimum of three case studies, one from each devolved nation. At least one of these case studies should be drawn from a grantee in a rural area.
	2. We expect the evaluator to organise a workshop for all the grantees from the three devolved nations, in one physical location, to agree on an evaluation framework and data collection tools.
	3. The evaluation should also provide learning opportunities for all grantees, using digital tools and meetings in physical locations. This will include organising a learning event, for grantees across the devolved nations, to share experience and learning throughout the Scheme.
	4. We expect the successful Bidder to share intelligence with the evaluators of the Great Place Scheme in England, and to draw learning from the logic model framework developed for that nation. HLF will facilitate this process.
	5. The Bidder should also have the capacity / resources to be able to interact and work with Welsh language projects. In particular, the evaluator will need to demonstrate the ability to work with one of the projects (in Wales) that uses Welsh exclusively as their main communication language.’ In order for the project to be involved in the programme evaluation (collect data, participate in learning events and workshop etc.) it is essential that evaluators can demonstrate the ability to communicate in the Welsh language.

# 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 expects 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, learning events and a communication and dissemination strategy. | TBC  |
| Make arrangements to contact all grantees. | Within 10 working days of contract start date  |
| Organise and facilitate workshop(s) for grantees to agree an evaluation framework and data collection tools. | July – August 2018  |
| Organise and facilitate one learning event per year for all grantees to share best practice, followed by the production of a key messages paper which captures learning, best practice and emerging findings.  | Dates to be confirmed (one learning event for each year i.e.201920202021) |
| An interim report detailing learning to date from projects and any recommendations to ensure outcomes are achieved, with structure agreed with HLF. | November 2019 |
| A final report, of 40 pages maximum including the case studies, with structure agreed with HLF | March 2021 |

# The above represents our minimum requirements.

# \* HLF 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. HLF 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 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. 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](https://www.mrs.org.uk/pdf/2013-04-23%20MRS%20SRA%20-%20DP%20Guidelines%20updated.pdf)).
	5. The successful Bidder will be expected to discuss and present findings at appropriate times, to internal and external audiences, including our Board, our Senior Management Team, Grantees, policy makers and other external stakeholders. 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 May 2018 and be completed by March 2021. The final report shall be submitted to HLF by the end of March 2021.
	2. The anticipated budget is up to £40,000 to include all expenses and VAT. HLF will not fund travel expenses for grantees and we expect the contractor to budget for venue hire, refreshments and facilitation. Value for money when choosing venues should be a consideration. The contract will be let by the National Heritage Memorial Fund. Payments will be made in three equal instalments. The first payment will be made upon signing of the contract and inception meeting. The second one upon receipt of the 2019 interim report, and the final payment upon HLF’s receipt of an approved final copy of the report in March 2021.
	3. The contract will be based on the HLF standard terms and conditions.
	4. The research 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 a maximum of 15 pages and include:
* a detailed methodology for undertaking the study;
* 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.
	1. Your Bid will be scored out of 100%.
1. **70% 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 against the following Quality Questions:

|  |  |
| --- | --- |
| 1. Demonstrated a clear understanding of the aims, objectives and main concerns of the evaluation.
 | Weighing 10% |
| 1. Demonstrated an awareness of the different policy contexts, evaluation and issues relating to place-making
 | Weighting15% |
| 1. Demonstrated experience of hosting capacity building workshops and learning events.
 | Weighting20% |
| 1. Demonstrated the Bidder has the capacity and resources to carry out the evaluation within the timescale, or if working in partnership, each organisation has the capacity to fulfil its role and roles of each partner is clear. This will include demonstrating capacity to communicate and engage with one project in the Welsh language.
 | Weighting25% |
| 1. Demonstrated a clear and realistic project plan, showing phases of the evaluation, tasks for each phase and roles and responsibilities for each member of the team. Within this plan consideration should be given to survey response fatigue and plans to mitigate against this and keep grantees engaged with the evaluation, for its duration.
 | Weighting15% |
| 1. Demonstrated well considered plans for dissemination of evaluation findings.
 | Weighting15% |

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

**30% of marks will be awarded for Price.**

Price: The evaluation of price will be carried out on the Schedule of charges you provide in response to **Table A**

## Price Criterion at 30%

* 30 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 30% (full marks) for price and the second placed Bidder gets 27.6% and so on. (8/100 x 30 = 2.4 marks; 30-2.4 = 27.6 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 you 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**@ £500* | **Post 2 @cost per day****(No of days)***e.g. Senior Consultant/manager/researcher**@£300* | **Post 3 @cost per day****(No of days)***Junior* *Consultant/equivalent* *e.g. £200* | **Total days** | **Total fees** |
| --- | --- | --- | --- | --- | --- |
| Inception meeting to agree plans and finalise requirements with the HLF | *e.g. 0.5* | *1* | *1.5* | *3* | *850* |
| *[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 reserves the right to clarify quality and prices and to reject tenders that demonstrate an abnormally low quality response. HLF 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 reserves the right to reject abnormally low tenders. HLF reserves 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\*: 29 March 2018

Tender return deadline: completed proposal to be returned to HLF by 11.00 am on 16 April 2018.

 Clarification meetings\*\* may be held with shortlisted consultants and would take place on week commencing 23 April 2018

HLF will notify Bidders of our procurement decision week commencing: 30 April 2018*.*

\*HLF will upload responses 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 both HLF’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 16 April 2018** to 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 is committed to providing a website that is accessible to the widest possible audience. Our website is annually tested by accessibility auditors and we must meet the WCAG 2.0 AA compliance level. Our accessibility testing covers all of our content, including downloadable documents, as well as the design and functionality of the site.

Reports and other documents created for HLF (**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. Tips for creating accessible documents can be found below. However, we strongly recommend referring to the RNIB, Gov.uk and WebAIM for more detailed information.

## 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.

### 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 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 HLF. Our logo can be found on the [HLF website](http://www.hlf.org.uk/grantholders/acknowledgement/Pages/Logosandacknowledgement.aspx).

**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**

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

1. A joint research project in 2016 between HLF and the RSA which concluded that heritage has the potential to connect people deeply to the places they live, and secure a wider range of social outcomes; and that this connection is more powerful if citizens are closer to heritage decisions and heritage activities. [↑](#footnote-ref-1)