

## Enquiry

The Trustees of Evesham Abbey Trust (the Trust) wish to appoint an Evaluation Consultant.

Further information about the history of the project and project outcomes follow the invitation to tender.

## Invitation to tender

The consultant should provide a project proposal in response to the brief which identifies key issues and includes the following;

- a. Your project method statement, identifying key delivery stages, milestones and dates.
- b. Details of how you will interface with our team
- c. Time proposed to be allocated to this work and pricing schedule
- d. CV highlighting qualifications and previous experience, including National Lottery Heritage Fund and/or Historic England, or similar funding bodies
- e. Extent of professional indemnity insurance or indemnity cover, if held
- f. Contact details of two references

The proposal should identify any additional work required which is not included in the brief and also any exclusions from the brief.

Submissions will be scored on the basis of 60% quality and 40% cost. Quality will be assessed in line with headings a-f above.

The delivery phase budget of **£4,500 (exclusive of VAT if applicable)** for this work will include all travel and expenses; no additional costs will be included.

Tenders are to be submitted in a digital format and emailed to Natalie Hanson, Community Engagement Worker and Mr Barrie Baldelli Trust Chair.

[natalie.hanson@eveshamabbey.org.uk](mailto:natalie.hanson@eveshamabbey.org.uk)      [bbaldelli@gmail.com](mailto:bbaldelli@gmail.com)

Tenders received by 5pm on 23<sup>rd</sup> July 2021.

Interviews to be conducted 29<sup>th</sup> July 2021.

## Background

Evesham Abbey Trust was established to address the deteriorating condition of Evesham Abbey ruins, and remove the monument from the Historic England 'Heritage at Risk Register'.

With community involvement at its heart, the Evesham Abbey Trust aims to conserve, restore and regenerate Evesham Abbey and shine a light on the important cultural, political and financial role it played in shaping events both in the UK and, subsequently, worldwide. One of the Trust's aims is to use the Abbey as an exemplar conservation, education and volunteer engagement project to help regenerate a heritage hub throughout the Vale of Evesham, working with other partners and community groups.

Evesham Abbey Trust were gifted freehold ownership of the Abbey site by the Rudge family, who had owned the site for more than 400 years. Please see [www.eveshamabbey.org.uk](http://www.eveshamabbey.org.uk) for further information

## Funding

The National Lottery Heritage Fund and Historic England have funded both the development and delivery stages of the project. The Historic England funding via their Heritage at Risk grant programme is to conserve the remains of the north wall and northeast corner, known as Abbot Reginald's Wall. The Heritage Fund is providing the majority of financial support for the conservation works to the remaining walls, the interpretation and activities. In partnership with Wychavon District Council, the Evesham Abbey Trust has also undertaken a rigorous campaign of fundraising to achieve the match funding required.

The Delivery Stage commenced in April 2021 with a combined grant of £898,786.

- £784,100 from NLHF (72% of the total project cost).
- £103,686 from HE (70% of the total project costs applicable to Abbot Reginald's wall).

These two grants are supplemented by additional fundraising including £68,000 underwrite from Wychavon District Council, £121,800 of in-kind support from the Evesham Abbey Trust, and a further £23,000 in other fundraising.

## The Project

The aims of this project are to:

- Restore and conserve the standing ruins.
- Retain and respect the distinctive architectural features and character of the abbey.
- Research, document, record and archive the history of, involving volunteers from the local community.
- Interpret and present its historical significance in accessible ways.
- Make this information accessible to the wider local community and others.
- Create an easily maintainable public gardens within the cloister and nave areas of the site.
- Enhance the surroundings to make it suitable for a diversity of users and uses.
- Provide a community space for the people of Evesham and beyond.
- Create a space that will complement and support the work of developing a 'heritage hub' within Evesham.

The project must be completed within the available resources, to a high quality and to a tight timescale so that the sustainability of Evesham Abbey Trust and its future aspirational works to the landscaping of the site can be secured in the future.

The Evaluation Consultant will be working alongside other consultants as follows:

- **Project Manager:** responsible for the overall delivery of a high-quality project which fulfills commitment to The National Lottery Heritage Fund and other funders in terms of outcomes and is delivered on time and on budget;
- **Conservation Architect:** acting on behalf of the Client to design elements of and support the overall delivery of the project;
- **Quantity Surveyor:** to manage the costs of the overall scheme;
- **Community Engagement Worker:** to deliver the Activity Plan; working together to use key themes to engage visitors of different ages from a wide variety of backgrounds and interests and in diverse formats including print and digital.
- **Interpretation Consultant:** to produce a cohesive scheme of interpretation that should be well-positioned within the site, and with design plans which accommodate it;
- **Ecologist:** to survey and introduce mitigation as required to protect the ecological interest of the site;
- **Archaeologist:** to undertake a trenched investigation of the cloister and nave areas, along with wall samples and community engagement work;
- **Structural Engineer:** to undertake duties from RIBA stages 5 to 7.

## Client

The Trustees of the Evesham Abbey Trust will act as the Client. They are responsible for commissioning the delivery of the project. The Evaluation Consultant will report to a Project Board which will be the point of responsibility for decisions and communications between the Project Team and The Evesham Abbey Board of Trustees.

The project match funding is being partly provided through volunteer hours. We have a core group of volunteers with engineering, gardening, archaeology and construction skills. It is vital that the community is engaged with the project and given every opportunity to involve themselves in its success through the coordinated efforts of the consultants, Community Engagement Worker, Project Team and successful contractor.

### Current Situation

Having secured Delivery funding from The National Lottery Heritage Fund and Historic England in 2020, Evesham Abbey Trust have confirmed the appointments of the Project Team and Principal Contractor. The Evaluation Consultant will be appointed to the point of final project completion and submission of the Evaluation Report in line with the Heritage Fund requirements. The project duration runs until the end of February 2023.

### Evaluation Consultant Specification

- Advise and support the Project Board with their public consultation strategy to engage residents, businesses, key stakeholders, and potential partners;
- Develop an Evaluation framework focusing on outputs, outcomes and benefits for the Delivery phase, building on what was prepared as part of the Activity Plan;
- Develop processes and methodology (both quantitative as well as qualitative) for capturing ongoing evidence and measuring success, achievements against outcomes, and lessons learned;
- Review baseline data, identify any gaps and put measures in place to capture data during the Delivery Phase;
- Identify and interview key stakeholders to provide different perspectives on the project (e.g. Trustees, Project Team, Education Providers, Volunteers etc.)
- Support the Project Manager with Progress Reports to the Heritage Fund during the Delivery Phase by providing information on evaluation;
- Attend Project Board meetings as required;
- Identify and provide support and some training for volunteers, staff, trustees in evaluation methods as required and make sure the focus on desired outcomes and ambitions is maintained;
- Contribute where required to the monthly project report prepared by the Project Manager;
- Support and advise the Project Board and wider volunteer base on the evaluation of activities throughout the Delivery Phase;
- Collate data and analyse evidence throughout the project to draw out successes and shortcomings and suggest improvements as needed
- Liaise with the Community Engagement Worker to ensure suitable evaluation is carried out of Activity Plan implementation;
- Attend certain events and activities to undertake evaluation with site users (including schools, family groups, etc.) as required
- Oversee implementation of the Evaluation Framework during the Delivery Phase including measurement of outputs, outcomes and benefits, the execution of the capital works, formative and summative evaluation of activities, and sustainability, community cohesion and economic impact;
- Design and refine research instruments as required, advising on sampling and analysis of data, collating information for reporting;
- Produce an interim evaluation report in Year 1.
- Author the final summative Evaluation report of the Delivery Phase of the project and its completion in accordance with the latest Heritage Fund guidelines; working in close collaboration with the Project Management Board.

### Timetable

A detailed timetable will be agreed between the Evaluation Consultant and Evesham Abbey Trust to comply with the requirements of grant funding. An indicative timetable has been developed as part of the Development Stage works and submitted to the Heritage Fund for approval.

| OUPUTS   | TIMETABLE                 |
|--|---------------------------|
| Commence project work                                  | September 2020            |
| Design and tender stage for contractors (RIBA 3 to 4a) | August 2020 to April 2021 |
| Contractors on site                                    | June 2021 to January 2022 |

|   |                            |
|---|----------------------------|
| Interpretation  | June 2021 to January 2022  |
| Activity Plan Implementation  | July 2020 to December 2022 |
| Interim evaluation at Project Completion of capital scheme, and end of project management involvement | March 2022                 |
| Final Evaluation Report for Entire Project  | December 2022              |

**Skills and experience required in the Evaluation Consultant**

- a. Experience on similar projects, with a proven track record of success relating to historic building projects
- b. Evaluation skills and working with diverse audiences
- c. Excellent interpersonal and communication skills
- d. Ability to work on own initiative
- e. Experience of setting/meeting targets
- f. Computer literacy
- g. Ability to prioritise and to work methodically
- h. Experience of report writing and record keeping
- i. Experience of evaluating NLHF and/or Historic England projects or similar
- j. Experience of reporting under NLHF guidelines

**It is essential that the post holder has a commitment to equal opportunities, anti-discriminatory and anti-oppressive behavior.**

**Offer Conditions**

- The appointment will be on a freelance contract, so the appointee will be responsible for all tax, NI etc.
- Copyright is to be owned by the Trust.
- If it appears that the work will not be completed to the standard illustrated in the consultants offer, or the approval of the Trust, then the contract will be terminated, payment made pro-rata and others appointed to complete the work.
- The history of the project, except as presented in the Report, is to be confidential.
- Interim editions in the form of discussions, schemes, drafts and illustrations are to be made available when, if and as requested by the Trust. The content is to be submitted in draft for approval and amended for presentation.
- Agreement to abide by the standard form of contract: fixed-term