

# Consultancy Support for Evaluation

**Role:** Evaluation Consultant

**Location:** Home based

**Reporting to:** Programme Manager

**Contract:** 11 months (end of Development Phase anticipated to be June 2025), with potential extension to span the project's Delivery Phase (early 2026-2030)

Wiltshire Museum is seeking to appoint an Evaluation consultant to work closely with the project team on The National Lottery Heritage Fund (NLHF) supported *Assizes for Devizes: Unlocking Wiltshire's Stories* project.

*Assizes for Devizes* is an ambitious large-scale redevelopment project to revitalise the currently derelict Devizes Assize Court as a community hub and new home for the Wiltshire Museum and its internationally important collections. The project is a collaboration between Wiltshire Museum, which will manage the project and run the building, and the Devizes Assize Court Trust (DACT), which owns the building.

Development funding of £300,748 has been awarded by The National Lottery Heritage Fund to help Wiltshire Museum, working closely with the Devizes Assize Court Trust, to progress plans for the project before applying for a full National Lottery grant in 2025. If successful, work would start on the Assize Court building in two to three years' time, with a target opening date of 2030.

To assist us in making a Delivery Phase application, Wiltshire Museum is seeking an experienced evaluation consultant in the project's Development Phase who can provide mentor support to the Project Development Team in developing a framework and plan for the monitoring and evaluation of the project, that can be applied up to and post-completion. During the Delivery Phase, the consultant would work with the team to implement the framework and plan – culminating in an evaluation report to be submitted to the NLHF at the end of the project.

Maximum budget for Development Phase, including expenses, but excluding VAT: £7,000  
Anticipated budget for Delivery Phase, including expenses, but excluding VAT: £30,000

## Background

### Data collection and evaluation experience

Wiltshire Museum is a member of the Wessex Museums partnership, which has been an NPO organisation since 2017. As part of this partnership, the Museum has been collecting qualitative and quantitative data pertaining to audiences and organisational development, alongside undertaking evaluation on programming for many years. We have established baselines and have a good understanding of who our audiences are and the makeup of our workforce and governance.

The Museum has received a number of projects grants from funders, including Weston Loan (Art Fund) and the NLHF. Our staff regularly carry out evaluation, using a range of methods, and produce summary reports on these projects.

### Project groundwork

As part of our NLHF Round 1 work, we have drafted outline aims and outcomes for the project. We have an outline Theory of Change in place. We have undertaken work to consider how we will evaluate the project under the new NLHF Investment Principles.

We have undertaken a market assessment and a substantial amount of audience development work, including identifying core and target audiences for the project, activity plan and interpretation framework.

We have an Activity Plan mentor and Interpretation and Exhibition Designers on board.

## The brief

### Development Phase

Wiltshire Museum wishes to appoint an Evaluation Consultant in the project's Development Phase who can support the Project Development Team in the development of a robust framework and plan for the ongoing formative and summative evaluation of the project that is in line with current NLHF evaluation guidance, alongside providing training and mentoring to key staff/volunteers in implementing the framework and plan. Staff and volunteers will undertake all data collection.

The primary outputs will be:

- **A project Evaluation Framework**, developed by the Project Development Team, coordinated by the Programme Manager, that provides skills and confidence in evaluation methods amongst the team to embed in their practice.
- **A project Evaluation Plan**, developed by the Project Development Team, coordinated by the Programme Manager, that focuses on objectives and outcomes in line with National Lottery Heritage Fund Evaluation guidance documents. To be submitted with the framework as part of a NLHF Delivery Phase application.
- **Mentoring of key staff/volunteers** in developing and implementing the framework and plan, including guidance on setting outcomes, outputs and data collection for staff and volunteers - who will be responsible for undertaking the data collection during the project.

The successful consultant will work closely with the Programme Manager, alongside the wider Project Development Team.

Monthly progress updates will be required by the Programme Manager during the Development Phase.

We expect this role can be undertaken virtually in the Development Phase, with the potential for one training session to be hosted in Devizes.

### **Delivery Phase**

We would expect the Delivery Phase brief to develop as the project progresses. During this Phase, the consultant will continue to provide mentoring support to the wider project team in implementing the evaluation framework and plan.

The Programme Manager will oversee the day-to-day management of all evaluation activity. The Project Engagement Officer, Community Curator and Learning Officer will lead on collecting evaluation data linked to activity.

The consultant, working with staff, will undertake the external evaluation of the project, including stakeholder interviews and staff reflections at key points within the project. With input from the project team, the consultant will produce a final evaluation report for the project to submit to the NLHF at project completion, assessing the short, medium and long-term impacts and outcomes of the project.

## **Outputs/deliverables**

The following deliverables are suggested. *These are intended to articulate our requirements for the consultancy. We welcome further suggestions, please indicate where you make changes/amendments and why when applying.*

### **Development Phase**

- Facilitate an initial meeting with the Project Development Team to consult on the mission, aims, objectives and outcomes of the project and activity and consolidate what we are going to measure, monitor and evaluate. Informed by an outline Theory of Change Logic Model developed by Wiltshire Museum. This meeting will inform the mentoring and guidance needed for the project.
- Review existing evaluation tools used and data collected by the Wiltshire Museum and suggest any improvements or changes to fit into the wider framework of the project.
- Keep abreast of developments within Architect, Activity Planning, Interpretation and Business Planning, including attending occasional working group meetings.
- Support staff in ensuring evaluation activities are integrated within all elements of the project, including setting environmental baselines.
- Mentoring, guidance and training:
  - Support the Programme Manager, through online meetings and guidance signposting, in creating a comprehensive evaluation framework for the project, in line with NLHF evaluation guidelines, that will enable quantitative and qualitative evidence to be collected against an agreed range of criteria. See NLHF guidance: <https://www.heritagefund.org.uk/funding/good-practice-guidance/evaluation-guidance>.
  - Support the Programme Manager, through online meetings, in producing the Evaluation Plan for the project, including guidance during start up, and producing a draft and final plan.
  - Provide mentoring and support to the project team to ensure they understand the purpose of evaluation and are committed to, confident and competent in carrying out evaluation as required and recording and storing data collected. It is anticipated that this will be carried out through the sharing of written guidelines, occasional online email support, and one or two half day online or in-person support sessions.
  - Provide guidance, through online meetings, to the Project Development Team in producing a written evaluation report of the Development Phase.

- Provide guidance through online meetings to the project team in monitoring the project against the NLHF and other funders evaluation requirements, including the new NLHF Investment Principles.

### **Delivery Phase**

*We anticipate these outputs will be developed as we progress through the Development Phase. Key anticipated outputs include:*

- Provide regular reports at key project milestones to illustrate progress towards intended aims, outputs and outcomes and highlighting where further work is needed.
- Facilitate reflection meetings with key stakeholders, consultants, staff and volunteers as needed.
- Continue to provide mentoring support via online meetings to project staff to support the successful implementation of the framework and plan, including regular check ins.
- With key input from the project team, produce interim reports and a robust and extensive final evaluation summary for the project, to submit to the NLHF on project completion.

### **Contract management**

We expect the consultancy support for evaluation in the Development Phase to begin in late June 2024 and be completed by June 2025. Anticipated start of Delivery Phase is early 2026, with competition in mid-2030.

The budget maximum in the Development Phase is £7,000 to include all expenses, but excluding VAT. The anticipated maximum budget in Delivery is £30,000 to include all expenses, but excluding VAT. The contract will be let by the Wiltshire Museum.

The consultancy will be managed on a day-to-day basis for Wiltshire Museum by the Programme Manager.

### **Skills and experience**

#### Experience

- Track record of developing evaluation plans and frameworks for an arts/heritage project, ideally in a museum environment
- Experience of supporting/mentoring teams, including volunteers, in evaluation and monitoring
- Experience of using a range of methodologies to monitor and evaluate activities and projects
- Experience of analysing evaluation and impact data and producing meaningful reports from these

#### Knowledge

- Understanding of NLHF guidance and funding requirements
- Understanding of working on a capital project development, ideally in a heritage setting

#### Abilities

- Outstanding communication skills with the ability to articulate a vision, strategy or idea clearly and concisely with a vigorous eye for detail
- Ability to support/mentor an organisation over a sustained period
- Strong report writing

### **Award criteria**

Submissions will be assessed against quality (60%) and cost (40%) basis. The quality score will be made against the following criteria:

- Evidence of developing an evaluation framework and plan for an arts/heritage project of a similar nature and scale within the last 10 years (30%)
- Clear approach, methodology and principles for successful mentoring (30%)
- Demonstratable understanding of the National Lottery Heritage Fund process (5%)
- Understanding of the aspirations, purposes, potential and desired outputs and outcomes of the project and those of the NLHF (10%)
- Evidence of the ability to deliver the project on time and within budget (10%)
- Consideration of what social value your services will provide, including social wellbeing and environmental impact (5%)
- Interview and presentation of proposal (10%)

## To apply

Applications are invited from individuals, organisations and partnerships (with lead partner stated). You are asked to submit:

- A CV and outline of previous relevant experience and statement indicating why you would be suitable for the role.
- An outline approach and methodology for the provision of Evaluation Consultancy throughout the project's Development Phase and Delivery Phase.
- Detail of how the plan/framework development process will be managed and an outline for implementation during the Delivery Phase.
- Project fees including expenses and a statement of daily rates.  
*Please give as much detail as possible in terms of cost, including personnel, rates and itemised costs, VAT. We envisage that most of the consultancy will be performed online via virtual meetings and over email and expect this to be reflected in the statement of approach.*
- Names and contact details of two referees.

Candidates who do not explore all elements of the key competencies and consultant's outputs will not be considered for the role.

Proposal return deadline: Monday 10<sup>th</sup> June 2024 at 5pm

Please email any questions regarding this brief to: Nicola Trowell, Programme Manager  
[nicola.trowell@wiltshiremuseum.org.uk](mailto:nicola.trowell@wiltshiremuseum.org.uk).

Quotations may be submitted electronically with the email header stating: "Evaluation Consultant Tender"

Short-listed candidates will be invited to attend a presentation and interview process on the week of 17<sup>th</sup> June 2024.

Please send completed tenders to: [nicola.trowell@wiltshiremuseum.org.uk](mailto:nicola.trowell@wiltshiremuseum.org.uk).