

Ripon Museums Trust Fairer Futures Tender Brief







Evaluation Consultant Brief

1. Introduction

Ripon Museum Trust (RMT) was established in 1982 and runs three museums in the heart of Ripon. We are a small Registered Charity and Limited Company. RMT tells the interlinked story of poverty, law, crime, punishment and justice - using a Grade II Victorian Workhouse Museum, Grade II* Liberty Gaol and Police Station, Grade II* Georgian Courthouse and a collection of 9000 objects to explore our themes. Community engagement helps us share stories of this unique heritage prompting people to act for a fairer society. We tell the story of the buildings themselves, the people who lived and worked in them and across all three sites. We put learning at our heart by delivering a changing programme of exhibitions, events, school visits and informal group learning. Learning is a key Value for RMT – whether directly delivering learning activities, supporting learning within our communities or as continuous organisational learning. RMT is an Accredited Museum and a Band One National Portfolio Organisation (NPO) with Arts Council England (ACE).

Our Trust's Vision is to use our Heritage Assets to Inspire People to Seek a Fairer Society. Our Museums' Mission is to use the unique trio of the Workhouse, Prison & Police and Courthouse Museums, collections and the stories they tell to help people explore big issues such as fairness, equality, justice and welfare. Through excellent engagement, programming and outreach, together we will inspire people to become compassionate and active citizens, shaping society for the better. We will work for greater participation in our heritage which will enrich lives and improve wellbeing. Volunteering is integral to our organisation; at our core we work as one team. We will make a positive impact on Ripon and the region's cultural and economic capital.

Ripon Museum Trust is an equal opportunity employer and adheres to Fair Recruitment. We welcome applications from all suitably qualified persons regardless of their race, sex, disability, religion/belief, sexual orientation, gender assignment or age. We have an Equality and Diversity Policy, Safeguarding Policy and procedures and Data Protection Polices. We are committed to reducing our carbon footprint and have an Environmental Policy.

2. Ripon Museum Trust: Inspiration for a Fairer Future Project

Our 'Fairer Futures' Project is worth £2.25M and is a substantial first step to delivering our 'Master Plan' for the Trust's future. Delivery of this Project will make significant strides towards achieving our Vision, transform the visitor experience and our engagement work with communities. It will create inclusive new spaces in the Workhouse Museum, open up previously unseen rooms and make our heritage accessible to a wider more diverse audience across all three museums. The Project will use joined up stories of the people who lived, worked and suffered at our three sites. We will make better use of our outdoor spaces and of digital techniques for more immersive engagement. The Project will secure our future and lower our carbon footprint through environmentally sustainable building improvements. The idea for our Project was born out of unease with growing social inequalities which have been exacerbated by the pandemic. A powerful new Vision for the use of our heritage emerged; to use it to inspire people to seek a fairer society. Over the last 3 years we have continued to develop these ideas and we have consulted widely. Our Project has six key strands:

Conservation of key areas of the Workhouse i.e. Main Block (recently acquired with a Heritage Lottery Fund grant). Conservation work will provide us with new spaces for activities, interpretation and learning. A lift will give access to the former dormitories which will be restored. We will prioritise eco-friendly design; a new roof, an air source heating

system and improved insulation will all reduce our carbon footprint and help us become more resilient. Access to and conservation of these areas will ensure preservation of the stories and heritage for the future.

New **interpretative techniques** will connect stories and visitor experiences across all three museums. With communities we will tell multi-layered stories of those who lived and worked here, bringing the story up to date. We will create a better-quality visitor experience, use digital and other interpretation for outdoor spaces at the Workhouse, improved internal spaces for learning, volunteering and other programming.

Community engagement and co-production will build on our work with people whose voices are often invisible in history. There will be exciting opportunities for new activities at all our museums engaging new people and communities and for placemaking. These build on our work as a NPO and the unique projects we have already delivered.

Our work to improve **Wellbeing** will be built into our activities and reflects our ambition to be become a place that demonstrably improves people's wellbeing.

Volunteering is at the heart of what we do, and we will expand and build on this work.

The value of our work on **placemaking** will increase by generating community wellbeing. We'll build on successful partnerships to develop activities to better explain our heritage. The Project will feed into master planning for the regeneration of Ripon's economy and bringing a wider sense of history and place.

3. Existing Baseline Data

RMT has been a NPO since 2018 and completes information on environmental performance to Julie's Bicycle. This data from 2018 onwards is available to the project Evaluation Consultant. The Sharrow View Project Evaluation Report 2017-18 also contains qualitative and quantitative data from audiences about what they would like to see at the Workhouse. There is Exhibition Evaluation data, Outreach evaluation and informal and formal learning evaluations. These were based on Quality Principles designed with funding from ACE. All our audience segmentation data is available and regularly updated. We have Volunteer Surveys (collected via SoGo and Survey Monkey) from 2019.

4. Scope

RMT wishes to appoint an experienced consultant team or individual consultant who can design and deliver inclusive, co-produced evaluation strategies reaching diverse audiences. Such an approach will model and progress the Trust's 'Fairer Society' Vision, make a step change in community participation with our heritage and themes, develop a strong and coherent sense of place across our three museums and meet National Lottery Heritage Fund requirements. The Evaluation process should involve our large volunteer community from the very start as an integral and sustainable part of conducting evaluation generally. The consultancy will give RMT the tools to collect and present excellent qualitative and quantitative evaluation of the impact of our project and which we can use going forwards to measure whether our Vision is being realised. The consultant will be required to propose and implement an Evaluation Framework and Reporting Programme in respect of the Development and Delivery phases of our Fairer Futures project that meets National Lottery Heritage Fund's Logic Model in respect of all proposed project outcomes (whether people, communities or heritage), including the other consultancy assignments. All plans must be designed and delivered within the overall capital and revenue budget set for Fairer Futures project.

The appointment is for both development and delivery phases; however, reappointment is subject to a break clause based on a successful Stage 2 grant and satisfactory performance from the consultant.

Scope in Development Phase

• To work with the consultant team to ensure there is a comprehensive set of baseline data.

- In the Development Phase the brief is to work with the consultants for the Activity Plan, Interpretation Plan and Business Plan to ensure that there is an appropriate formative and summative evaluation framework for the mid stage review and Delivery Phase submission application.
- Evaluate the Development Phase from all perspectives and take lessons learnt into the Delivery Phase
- Contribute to the Mid-term review report with the client and the National Lottery Heritage Fund (currently scheduled for Summer 2023)
- Prepare the section on evaluation in the Delivery Phase submission application form
- Contribute / mentor the in-house team (staff and volunteers) on how to collect data to feed into progress reports
- Lead on formative evaluation of the interpretation with the interpretation consultant

Scope in the Delivery Phase

- Work with the Architect / Design Team to provide evaluation on environmental performance improvements
- Develop Evaluation Toolkit for use by Delivery Team to evaluate new activities, events, volunteering and to feedback and improve on delivery
- Provide regular (especially for Mid Term Review Summer 2023 and Project Board) reports that map progress against targets, outputs and heritage outcomes
- Prepare and present comprehensive summative Evaluation Report covering all aspects of the Development Phase Project

5. Detailed Task specification

- Advise on and create a Logic Model of Evaluation for use within activities, participation in and outcomes of the Project which evaluates short, medium and long term Outputs and Outcomes.
- Advise on and create in person and digital methods for evaluation data collection and analysis.
- Ensure the Evaluation Model meets all National Lottery Heritage Fund requirements for evaluation. <u>Evaluation</u> guidance | The National Lottery Heritage Fund
- Facilitate discussion with Project Board and the wider team on external factors and bias which influence evaluation.
- Facilitate discussion with the wider team to ensure that all evaluation meets all Equality and Diversity legislation, best practice and is relevant, creative and inclusive. Ensure evaluation will enable full participation from people from protected characteristics including (and not confined to) age, sexual orientation, gender, gender identification, ethnicity, socio-economic background, disability etc.
- Access and collate current baseline data and collection methods and how new framework will fit with current methods of evaluation
- Advise on and create a set of research, collection and analysis tools appropriate for the Project and the organisation to use throughout the Project.

- Prepare and present comprehensive reports on progress for Project Board, for Mid Term Review and on evaluation of the Development Phase Project
- Ensure that the Evaluation Framework and all tools are operationally, business and organisationally fit for purpose.
- Liaise with other consultants within the Project to ensure evaluation fully reflected in the business plan and organisation design both within and beyond the National Lottery Heritage Fund funded period.
- Deliver up to 1no day of training as required to Trustees, Staff and Volunteers on evaluation methods and analysis.

6. Management

The Evaluation Consultant will be managed by the Community Curator and Report to the Project Team. Consultants will be required to report to monthly project team meetings as required either through written reports or attendance in person or virtually. All interdependencies between other consultants' briefs must be taken into account.

7. Timescales

Brief supplied	January 2023
Deadline for questions	5pm 6 th February 2023
Submission	12 Noon Monday 13 th February 2023
Interviews	w/c 27 th February 2023
Consultants appointed	March 2023
Development Phase contract completed (break	November 2023 (Subject to discussion)
clause)	

The programme will be worked up in further detail with the appointed team but there is currently a desire to work to a November 2023 second round submission which it is noted is challenging and will require further discussion. The programme has a hard deadline of completion by February 2024 due to the grant expiry date. This will need to be considered in the costs.

8. Fee

There is a budget up to £5,000 (excl of VAT) for the development stage of work and £20,000 (excl of VAT) in the Delivery Phase. The fee is inclusive of all travel/subsistence.

9. Submission requirements

Tenders should include:

- Describe recent (within the last 3 years) examples of your experience in relevant National Lottery Heritage Fund funded projects producing Evaluation Frameworks and clearly stating the role played in the projects.
- Describe your experience (last 3 years) in the independent museum sector.
- Describe in detail your approach to delivering evaluation frameworks for new interpretation, activities including outdoor activities and innovative digital content.
- Describe your approach to delivering this programme of work including key milestones.
- Provide evidence of Insurances required Professional Indemnity of £2m, Public Liability of £5m, Employers' Liability £2 million.
- Proposed fee structure with a breakdown of day rates. Travel time for site visits should be clearly set out and are included in the total fee.
- State availability for interview w/c 27th February 2023.
- CVs (max 4 pages each) for key team members including membership of relevant professional bodies and adherence to professional standards.
- Contact details for at least two referees.
- Maximum Tender page length 10 pages.

• Tenders must be signed by CEO, business owner or equivalent senior representative of the Consultancy.

Please contact our appointed project manager Elanor Hazlehurst on 01543 414 777 or via email at <u>elanor.hazlehurst@greenwoodprojects.com</u> for all enquires. Please return all submissions to Elanor Hazlehurst via <u>elanor.hazlehurst@greenwoodprojects.com</u> by 12pm noon February 13th 2023.

10. Selection Information

Submissions will be assessed on; appropriate experience; a clear understanding of the requirements of the project; a proven track record of successful delivery of similar projects; an approach which is both imaginative and practical and represents good value for money. We would also like to see evidence of good team working and of successful completion of National Lottery Heritage Fund funded projects.

- Selection will be based on a Price / Quality Scoring split of 30% / 70%. Quality is an equal split between experience and approach.
- Panel Interviews
- References
- National Lottery Heritage Fund Sign Off

Please see below for an outline of the evaluation criteria:

Evaluation Criteria	Rating (0-5)	x	Weight	=	Total
Related Project Experience					
a. Qualifications and experience of the proposed team. As detailed on CV's supplied		x	3	=	
 b. Proven track record within the last 3 years of undertaking similar evaluation projects. At least one project must have National Lottery Heritage Fund funding. 		х	4	=	
Proposed Methodology	-		-		
a. A full statement on your proposed approach to completing the work, this should include how you will work with the wider team to ensure data collection. In particular the response should outline your approach to GDPR.		Х	4	=	
 b. Outline how you will work with the RMT team and wider project team. 		х	3	=	
Price	1				
Fixed and Firm Cost with full breakdown of day rate, resource allocation and expenses					
Grand Total					

Price Evaluation

Price will count for 30 marks and will be evaluated on the basis of each Tenderer's tendered prices as set out.

The lowest overall tendered price will score full marks for price.

The marks for price for each other Tender will be calculated by the following formula:

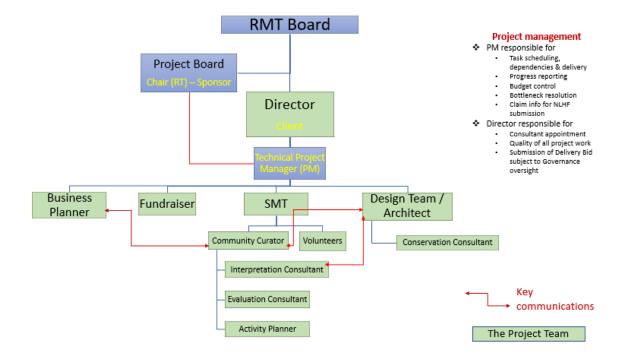
Maximum marks for Price x _____ Price of lowest priced Tender

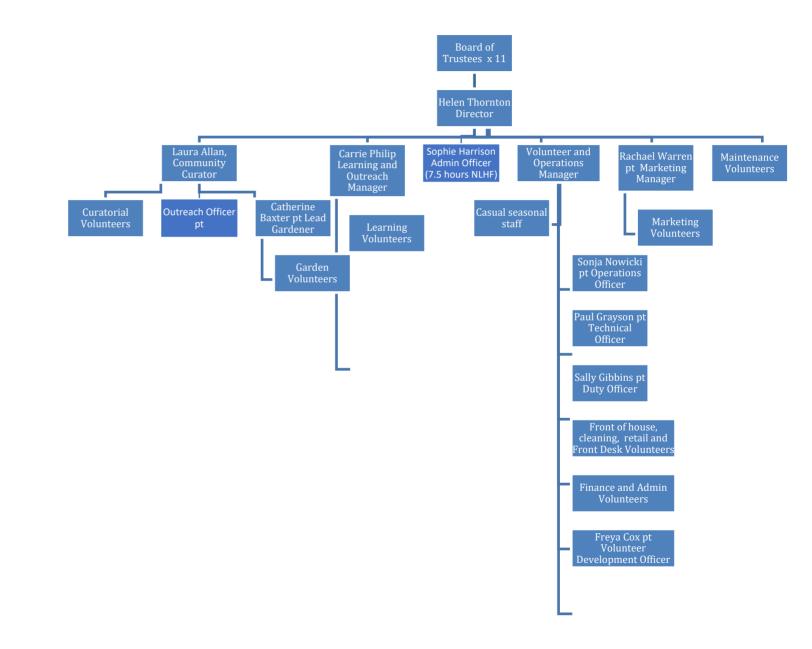
Price of Tender being evaluated

11. Additional Information

Tenderers must keep their tenders open for 90 days. RMT is committed to procuring goods, works and services locally whenever possible and in an environmentally responsibility manner. We are committed to equality and diversity and will assist tenderers to gain access to the process. We will use guidance from the National Lottery Heritage Fund for the creation of Briefs and Contracts.

12. Appendices Project organisational structure RMT staff organisational chart. Outline Programme





Key responsibilities

Director ft

- Strategic direction
- Financial and performance management
- External relationships (ACE etc)

Volunteer and Operations Manager ft

- Management and development volunteers
- Visitor Services, access and facilities management
- Environmental Action Plan lead

Learning and Outreach Manager ft

- Learning Programme development
- Developing new approaches to learning including digital
- Manage Learning Volunteers

Community Curator ft

- Community Engagement
- Collections Management
- Manage Curatorial Volunteers

Marketing Manager pt

- Marketing and PR Strategy
- Social media and digital content

Lead Gardener pt

- Develop and manage three historic gardens
- Manage Garden Volunteers

Operations Officer pt

• Front line and administrative operations

• Income development

Volunteer Development Officer pt

- Support for volunteers with additional needs
- Mental Health and Wellbeing for all volunteer teams

Technical Officer pt

• Informational Technology hardware and software support

Learning Officer pt

- Delivery of learning sessions/digital to schools and other learners
- Programme administration

Outreach Officer pt

- Delivery of outreach sessions to community groups
- Community engagement

Duty Officer pt

- Front line customer services and rotas
- Visitor data



				Ripon Museum Trust Fairer Futures Project
Task Mode	Task Name Development Stage	Duration Start 1 day? Mon 14/11/22	Finish Mon 14/11/22	Documbar Description Description <thdescription< th=""> <thdescription< th=""> <t< th=""></t<></thdescription<></thdescription<>
•	Project Team Procurement Procurement of Design Team	96 days Mon 14/11/22 85 days Mon 14/11/22	Mon 27/03/23 Mon 13/03/23	
*	Finalise Design Team Brief Advertise Design Team Brief	10 days Mon 14/11/22 41 days Mon 12/12/22	Fri 25/11/22 Man 06/02/23	
*	Interviews Design Team References and Sign Off	5 days Mon 20/02/23 10 days Mon 27/02/23	Fri 24/02/23 Fri 10/03/23	
*	Appointment Target Start Date	5 days Mon 06/03/23 0 days Mon 13/03/23	Fri 10/03/23 Mon 13/03/23	1763
-	-			
*	Procurement of Quantity Surveyor Finalise QS Brief	86 days Mon 14/11/22 10 days Mon 14/11/22	Mon 13/03/23 Fri 25/11/22	
*	Advertise QS Brief Interviews QS	33 days Mon 12/12/22 5 days Mon 20/02/23	Wed 25/01/23 Fri 24/02/23	
*	References and Sign Off Appointment	10 days Mon 27/02/23 5 days Mon 06/03/23	Fri 10/03/23 Fri 10/03/23	
*	Target Start Date	1 day Mon 13/03/23	Mon 13/03/23	in the second
4	Procurement of Interpretation and Fit Out Team	86 days Mon 14/11/22	Mon 13/03/23	
*	Finalise Interpretation Plan Development and Fit Out Design Consultant Brief		Fri 25/11/22	
*	Advertise Interpretation Plan Development and Fit Out Consultant Brief	33 days Mon 12/12/22	Wed 25/01/23	
*	Interview Interpretation Plan Development and Fit Out Consultant	5 days Mon 20/02/23	Fri 24/02/23	
*	References and Sign Off Appointment	10 days Mon 27/02/23 5 days Mon 06/03/23	Fri 10/03/23 Fri 10/03/23	
*	Target Start Date	1 day Mon 13/03/23	Mon 13/03/23	
-	Procurement of Business Planner	85 days Mon 28/11/22	Mon 27/03/23	
*	Finalise Business Plan Consultant Brief Advertise Rusiness Plan Consultant Brief	10 days Mon 28/11/22 26 days Mon 09/01/23	Fri 09/12/22 Mon 13/02/33	
*	Interviews Business Plan Consultant References and Sign Off	5 days Mon 27/02/23 10 days Mon 06/03/23	Fri 03/03/23 Fri 17/03/23	
*	Appointment Target Start Date	5 days Mon 13/03/23 0 days Mon 27/03/23	Fri 17/03/23 Mon 27/03/23	* 27/93
*				
*	Procurement of Activity Planner Finalise Activity Plan Consultant Brief	86 days Mon 28/11/22 10 days Mon 28/11/22	Mon 27/03/23 Fri 09/12/22	
*	Advertise Activity Plan Consultant Brief Interview Activity Plan Consultant	26 days Mon 09/01/23 5 days Mon 27/02/23	Mon 13/02/23 Fri 03/03/23	
*	References and Sign Off Appointment	10 days Mon 06/03/23 5 days Mon 13/03/23	Fri 17/03/23 Fri 17/03/23	
*	Appointment Target Start Date	5 days Mon 13/03/23 1 day Mon 27/03/23	Fri 17/03/23 Mon 27/03/23	
-	Procurement of Evaluation Consultant	318 days Mon 21/11/22	Wed 07/02/24	
*	Finalise Evaluation Consultant Brief Advertise Evaluation Consultant Brief	10 days Mon 28/11/22 26 days Mon 09/01/23	Fri 09/12/22 Mon 13/02/23	
*	Interviews Evaluation Consultant References and Sign Off	5 days Mon 27/02/23 10 days Mon 06/03/23	Fri 03/03/23 Fri 17/03/23	
*	Appointment	5 days Mon 13/03/23	Fri 17/03/23	
*	Target Start Date	1 day Mon 27/03/23	Mon 27/03/23	
*	Fundraising Activities Trust and Foundation Applications	240 days Mon 21/11/22 116 days Mon 08/05/23	Fri 20/10/23 Sat 14/10/23	
*	Individual Giving Campaign	240 days Mon 21/11/22	Fri 20/10/23	
-	Capital Design Process	196 days Mon 13/03/23	Mon 11/12/23	+ 13/03
*	Design Team Initiation Meeting Full Project Team Initiation Meeting	0 days Mon 13/03/23 0 days Mon 27/03/23	Mon 13/03/23 Mon 27/03/23	* 1743 * 27,43
*	Investigation and Surveys - identify, procure and execute	40 days Mon 13/03/23	Fri 05/05/23	
*	RIBA Stage 2 Outline Design Consultation with statutory consultees	50 days Mon 13/03/23 20 days Mon 15/05/23	Fri 19/05/23 Fri 09/06/23	
*	RIBA 2 Initial Cost Planning Value Engineering Period	20 days Mon 12/06/23 15 days Mon 10/07/23	Fri 07/07/23 Fri 28/07/23	
*	Project Board Review and Sign Off	5 days Mon 24/07/23	Fri 28/07/23	
*	RIBA Stage 3 Design RIBA Stage 3 Interim Cost Planning	30 days Mon 31/07/23 20 days Mon 11/09/23	Fri 08/09/23 Fri 06/10/23	
*	Project Board Review and Sign Off Pre Planning Consultation	5 days Mon 09/10/23 15 days Mon 11/09/23	Fri 13/10/23 Fri 29/09/23	
*	Planning Application Prep Submission of Planning Application	20 days Mon 11/09/23 2 days Mon 16/10/23	Fri 06/10/23 Tue 17/10/23	
*	Application Registration Planning Determination Period	4 days Wed 18/10/23 30 days Tue 24/10/23	Mon 23/10/23 Mon 04/12/23	
*	Planning Award	5 days Tue 05/12/23	Mon 11/12/23	
4	Interpretation Design and Planning	155 days Mon 13/03/23	Fri 13/10/23	
*	Consultant Initiation Meeting RIBA Stage 2 Exhibition Design Development	5 days Mon 13/03/23 86 days Mon 13/03/23	Fri 17/03/23 Mon 10/07/23	
*	RIBA 2 Exhibition Cost Planning Project Board Review & Sign Off	20 days Mon 26/06/23 5 days Mon 24/07/23	Fri 21/07/23 Fri 28/07/23	
*	Consultation / User Group Feedback	20 days Mon 31/07/23	Fri 25/08/23	
*	RIBA stage 3 Exhibition Design Project Board Review and Sign Off	30 days Mon 28/08/23 5 days Mon 09/10/23	Fri 06/10/23 Fri 13/10/23	
-	Activity Planning	145 days Mon 27/03/23	Fri 13/10/23	
*	Initiation / Kick Start Meeting with Team Phase 1 Situation Analysis (consultation)	0 days Mon 27/03/23 40 days Mon 27/03/23	Mon 27/03/23 Fri 19/05/23	¢ 27/83
*	Phase 2 Action Plan and Draft Plan	45 days Mon 22/05/23	Fri 21/07/23	
*	Project Board Review and Sign Off Consultation and Feedback of draft Plans	5 days Mon 24/07/23 30 days Mon 31/07/23	Fri 28/07/23 Fri 08/09/23	
*	Phase 3 Finalization (Final Activity Plans) Project Board Review and Sign Off	50 days Mon 31/07/23 5 days Mon 09/10/23	Fri 06/10/23 Fri 13/10/23	
-	Business Planning	145 days Mon 27/03/23	Fri 13/10/23	
*	Initiation Meeting	0 days Mon 27/03/23	Mon 27/03/23	27/83
*	Review of Current Data Situation Analysis	30 days Mon 27/03/23 30 days Mon 27/03/23	Fri 05/05/23 Fri 05/05/23	
*	Draft Business Project Board Sign Off	65 days Mon 24/04/23 5 days Mon 24/07/23	Fri 21/07/23 Fri 28/07/23	
*	Final Business Plan	50 days Mon 31/07/23	Fri 06/10/23	
-	Project Board Review and Sign Off	5 days Mon 09/10/23	Fri 13/10/23	
*	Evaluation Develop Evaluation Framework	228 days Mon 27/03/28 30 days Mon 27/03/23	Wed 07/02/24 Fri 05/05/23	
*	Develop Data collection methods Develop Baseline Data	30 days Mon 27/03/23 80 days Mon 27/03/23	Fri 05/05/23 Fri 14/07/23	
*	Project Board Review and Sign Off Interim Report	5 days Mon 24/07/23 26 days Mon 31/07/23	Fri 28/07/23 Mon 04/09/23	
*	Develop Delivery Stage Framework	50 days Mon 31/07/23	Fri 06/10/23	
*	Project Board Review and Sign off Final Development Phase Evaluation Report	5 days Mon 09/10/23 5 days Mon 27/11/23	Fri 13/10/23 Fri 01/12/23	
-	Delivery of HF Stage 2 Application	79 days Mon 31/07/23	Thu 16/11/23	
*	HF Mid Stage Review	20 days Mon 28/08/23	Fri 22/09/23 Fri 04/08/23	
	Prepare Bid Ownership Matrix and Issue for comment	5 days Mon 31/07/23 20 days Mon 04/09/23	Fri 04/08/23 Fri 29/09/23	
*	Project Board review and commentary	5 days Mon 09/10/23	Fri 13/10/23	
*	Second draft of HF Application Questions Finalisation of supporting documentation	10 days Mon 16/10/23 10 days Mon 16/10/23	Fri 27/10/23 Fri 27/10/23	
*	Final Iterations and approval of application Upload HF Application onto Portal	5 days Mon 06/11/23 4 days Mon 13/11/23	Fri 10/11/23 Thu 16/11/23	
~	HF Determination Process	60 days Thu 16/11/23	Wed 07/02/24	
-		Jo uays Inu 16/11/23	wed 0//02/24	
*	Deadline for Submissions (TBC)	0 days Thu 16/11/23	Thu 16/11/23	
		0 days Thu 16/11/23 60 days Thu 16/11/23 TBC	Thu 16/11/23 Wed 07/02/24	

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