



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 Policies. 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 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. [Evaluation 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 clause)	November 2023 (Subject to discussion)

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 elanor.hazlehurst@greenwoodprojects.com for all enquires. Please return all submissions to Elanor Hazlehurst via elanor.hazlehurst@greenwoodprojects.com 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.		X	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.		X	4	=	
b. Outline how you will work with the RMT team and wider project team.		X	3	=	
Price					
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:

$$\text{Maximum marks for Price} \times \frac{\text{Price of lowest priced Tender}}{\text{Price of Tender being evaluated}}$$

11. Additional Information

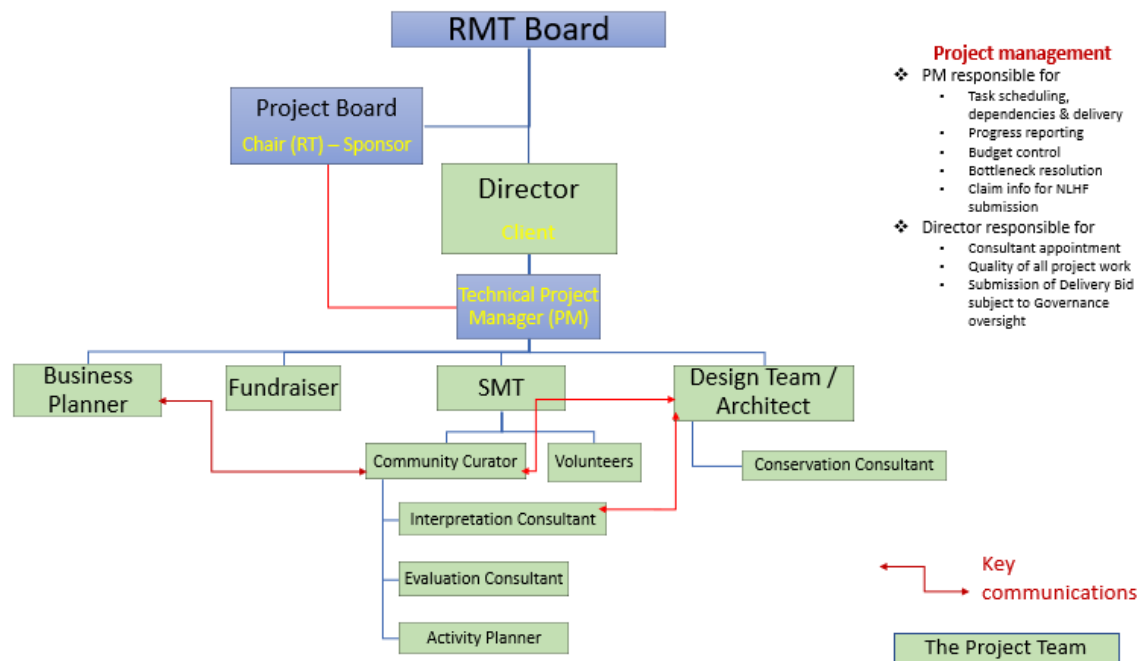
Tenderers must keep their tenders open for 90 days. RMT is committed to procuring goods, works and services locally whenever possible and in an environmentally responsibility manner. We are committed to equality and diversity and will assist tenderers to gain access to the process. We will use guidance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

12. Appendices

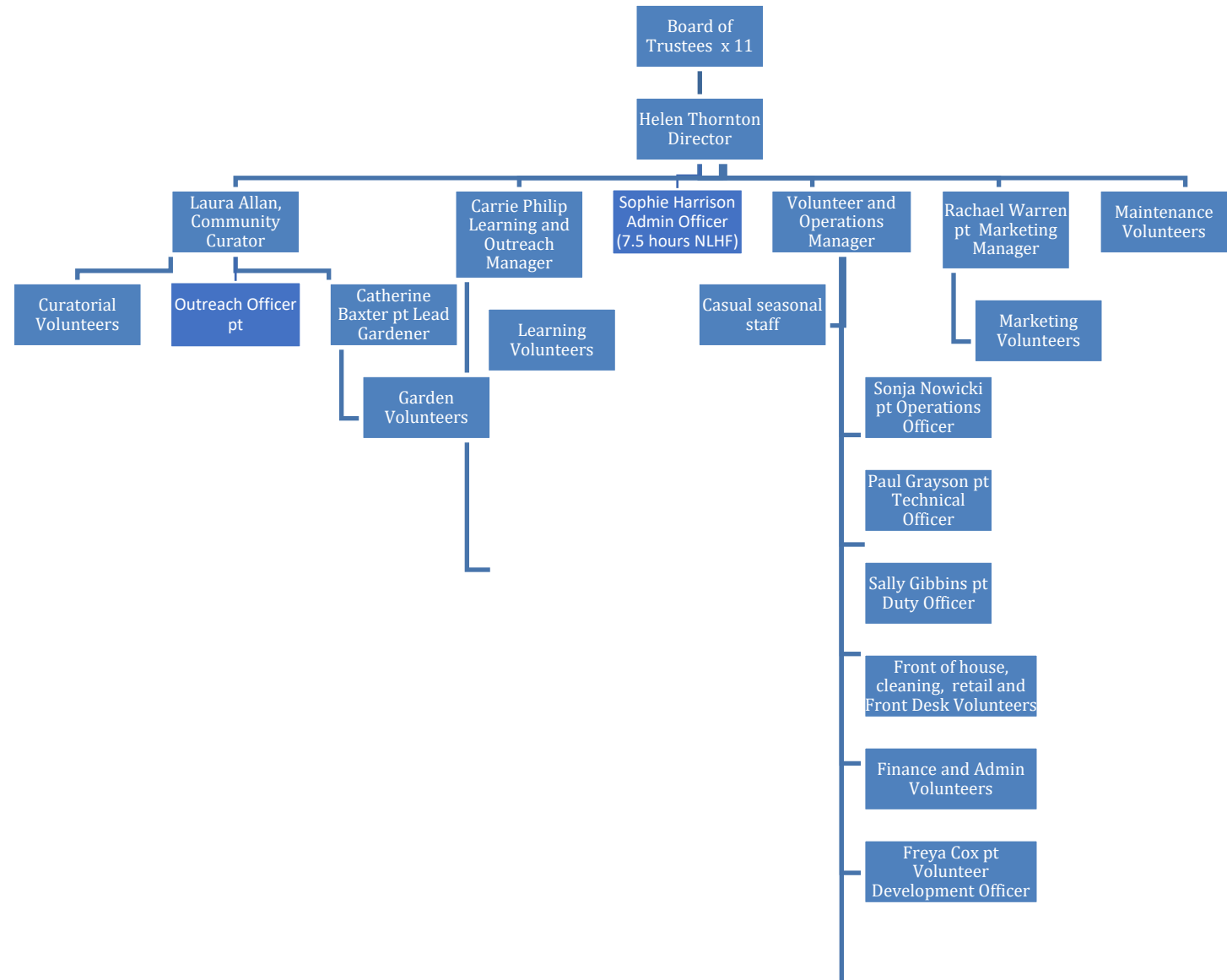
Project organisational structure

RMT staff organisational chart.

Outline Programme



APPENDIX G – Key responsibilities of RMT staff July 2021



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

Project 22 11 16 RMT Fairer Fu

Date: Thu 05/01/23

Task

Split

Milestone

Summary

Project Summary

Active Task

Active Milestone

Active Summary

Manual Task

Duration only

Manual Summary Followup

Manual Summary

Start only

Finish only

External Tasks

External Milestone

Deadline

Progress

Manual Progress