



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 transformational 'Fairer Futures' Project is worth over £3m and is a substantial first step to delivering our 'Master Plan' for the Trust's future. The major funder for the project is The National Lottery Heritage Fund, amongst others. 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.

The key strands of activity for Fairer Futures are summarised as follows:

- **Conservation of key areas of the Workhouse** i.e. Main Block (recently acquired with a Heritage Fund grant). Through a significant programme of capital works included in the project, the conservation of these elements will provide new spaces for activities, interpretation and learning. The insulation of the Workhouse Museum roof and the repair and improvement to its windows and doors will reduce environmental inefficiencies. Access to and conservation of these areas will ensure preservation of the stories and heritage for the future. The first floor will become accessible through a platform lift, step lift and a toilet upgrade, and will be redecorated. Redecoration of the upper floors of the workhouse will significantly improve working conditions for staff and volunteers, and the inclusion of shared spaces will enhance team working and wellbeing. A new multi-functional space on that floor will accommodate planned activities, and a new costumes store will be created.
- New interpretative approaches will connect stories and visitor experiences across all three museums. Including being informed by co-creation workshops, RMT will tell multi-layered stories of those who lived and worked here, bringing the story up to date. A better-quality visitor experience will be created, using digital and other interpretation for outdoor spaces at the Workhouse, and with improved internal spaces for learning, volunteering, and other programming.
- A full activity programme, including community engagement and co-production, will build on established work with people whose voices are often invisible in history. There will be exciting opportunities for new activities engaging new people and communities and for placemaking.

The project began in December 2024 and will finish in Spring 2028.

3. Scope

RMT wishes to appoint an experienced consultant team or individual consultant who can design and deliver inclusive, co-produced evaluation strategies to monitor the success of the 'Inspiration for a Fairer Future' project in the delivery phase. The approach needs to assess whether the project meets its approved purposes, as well as reviewing whether organisational learning is taking place, and that the activity delivers RMT's vision to 'Use our heritage assets to inspire others to seek a fairer society'.

To help evaluate the organisation's impact on fostering a fairer society and changing people's behaviour, RMT developed their 'Reason for Being' (Appendix 1). Demonstrating whether people have become more knowledgeable, creative, compassionate, motivated and confident in their ability to make a difference, is vital to the success of the project and the delivery of RMT's inspiring vision.

The Evaluation Consultant will be required to undertake an initial review of the evaluation documents and data collected during the project's Development Phase. They will be required to propose and implement an updated Evaluation Framework, as well as reviewing and updating the heritage outcomes produced during the Development Phase. A reporting programme will also need to be produced. The Consultant will implement the updated Evaluation Framework in respect

of the Delivery Phase of our project that delivers The National Lottery Heritage Fund's four Investment Principles:

- Saving Heritage
- Protecting the Environment
- Inclusion, Access and Participation
- Organisational Sustainability

4. Existing Baseline Data

RMT has been capturing a variety of data for years however this has often been piecemeal and with no focus on setting baselines so that impact can be better monitored. A key aspect of the evaluation consultant's brief will be to work with staff to identify baseline data and advise on gaps and support the team in collecting it.

Current data includes Gift Aid postcode data, schools' footfall, visitor numbers, visitor surveys, annual volunteer survey, staff survey and visitor demographic data. RMT has been a NPO since 2018 and completes information on environmental performance to Julie's Bicycle.

Scope in the Delivery Phase

- To work with the Client team to ensure there is a comprehensive set of baseline data.
- Lead on formative evaluation of the interpretation with the interpretation consultant
- 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
- Feed into the Heritage Fund quarterly progress reports.
- The Evaluation Consultant should prepare and present an interim report after completion of the capital works, as well as a final comprehensive summative Evaluation Report covering all aspects of the Delivery Phase Project

5. Detailed Task specification

- Undertake a full review of the evaluation documents and data collected during the Development Phase, including the Evaluation Framework. The Consultant will be expected to make appropriate changes to these for the Delivery Phase. The Framework should be for use within activities, participation in and outcomes of the project which evaluates short-, medium- and long-term outputs and outcomes, as well as delivery against the Heritage Fund's Investment principles.
- Ensure the Evaluation Model meets all The National Lottery Heritage Fund requirements for evaluation. [Evaluation guidance | The National Lottery Heritage Fund](#)
- Advise on and create a set of research, collection and analysis tools appropriate for the project and the Trust to use throughout the project. These should be in person and digital methods.
- Ensure a photographic record of the capital works is being kept up to date throughout the project to ensure that before, during, and after images can be shown in the final report.
- Facilitate discussions with the Project Board and the wider team on external factors and bias which influence evaluation. 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.

- Liaise with other consultants within the Project to ensure evaluation fully reflected in the business plan and organisation design both within and beyond The Heritage Fund’s funding period.
- Undertake formative evaluation of the interpretation in conjunction with the Interpretation Consultant.
- Ensure that the digital elements of the project are evaluated.
- Establish key challenges, lessons learned and successes, and how these can be applied as part of the project legacy and long-term sustainability.
- Deliver up to 2 days 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

Activity	Target dates
Advertise	Friday 31 st January 2025
Application deadline	12 noon on Friday 7 th March 2025
Interviews	w/c 17 th March 2025
Appointed	w/c 31 st March 2025
Contract completed (Delivery Phase)	28 th February 2028

8. Fee

There is a budget of £20,000 (incl. 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 £1m, Public Liability of £2m, Employers’ Liability £1 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. The number of days required on site should also be quantified in the response.
- State availability for interview week commencing w/c 17th March 2025.

- 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 (exc. CVs).
- Tenders must be signed by CEO, business owner or equivalent senior representative of the Consultancy.

Please contact one of our appointed Project Managers, Eleanor Hall, on 01543 414 777 or via email at eleanor.hall@greenwoodprojects.com for all enquiries. Please return all submissions to Eleanor Hall via eleanor.hall@greenwoodprojects.com by 12 noon on Friday 7th March 2025.

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 teamwork and of successful completion of National Lottery Heritage Fund 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

Please see below 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.

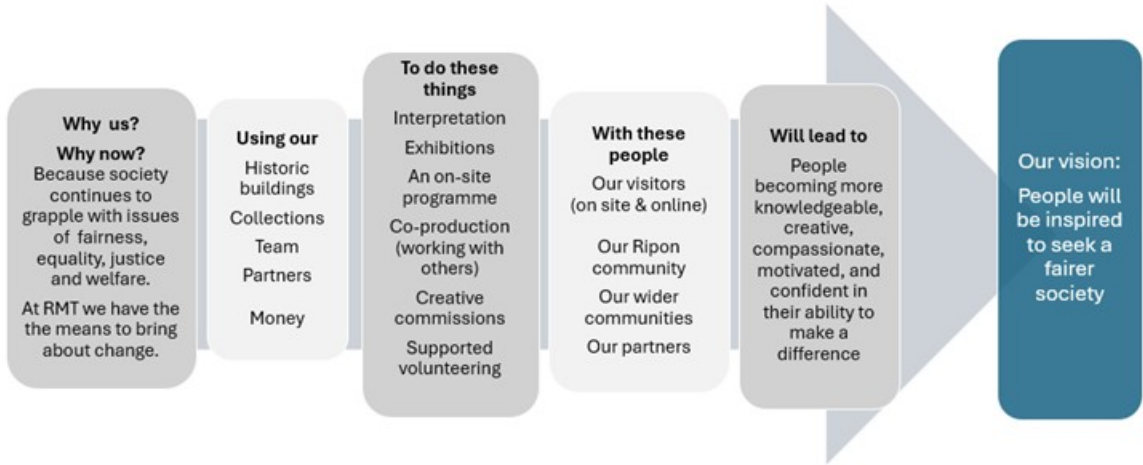
Tenderers must provide tenders which include:

- (i) Non consideration form of tender
- (ii) Tenderer's warranties
- (iii) Confidentiality Clauses
- (iv) Freedom of information Statement

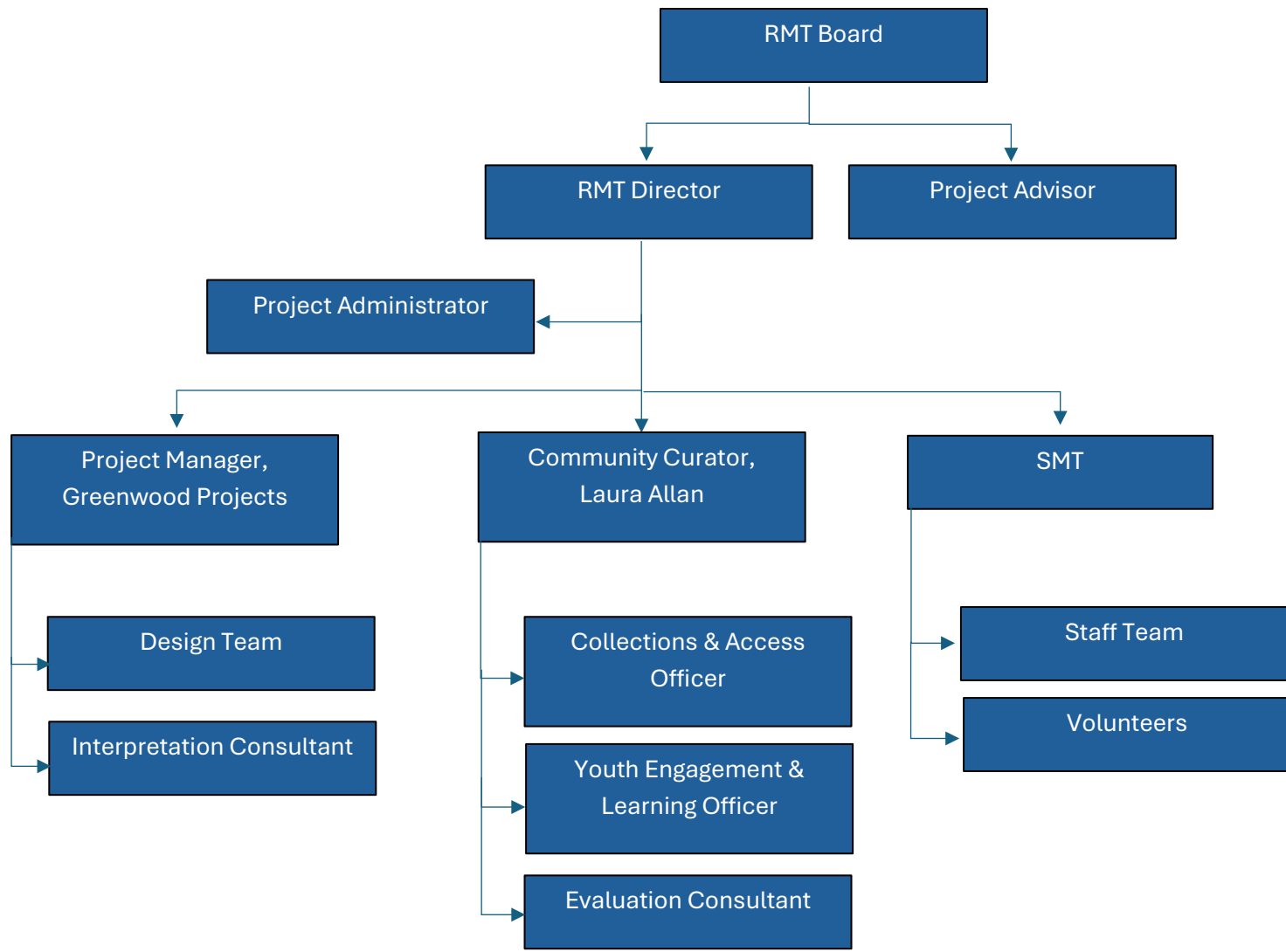
12. Appendices

RMT's 'Reason for Being'
Project Organisational Structure
RMT Staff Organisational Chart.
Delivery Phase Programme

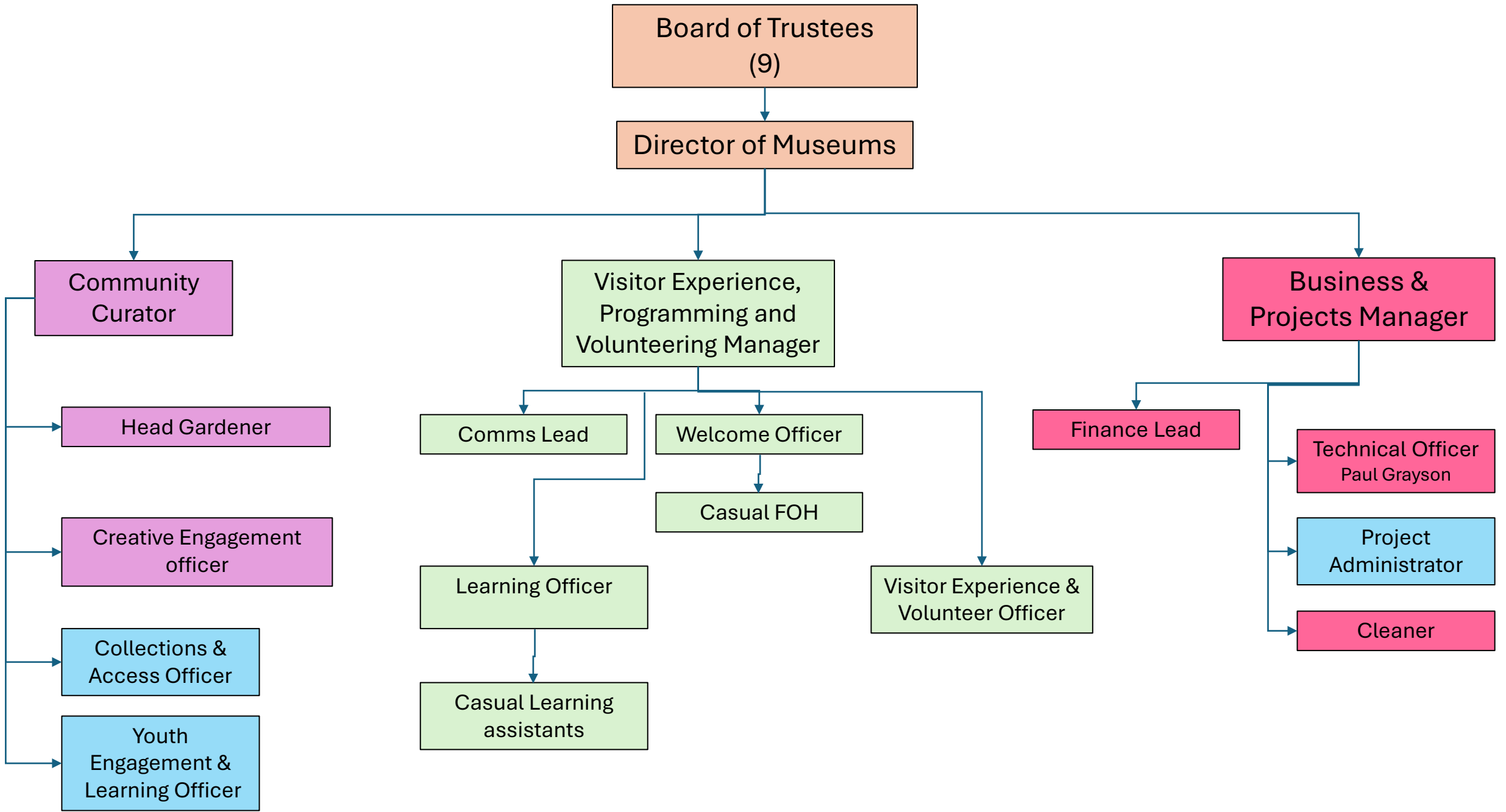
Appendix 1: RMT's 'Reason for Being'



Appendix 2: Project Organisational Structure



Appendix 3:
RMT Staff Organisational Chart



Appendix 4: Delivery Phase Programme

