

## **APPENDIX 7: BRIEF & FRAMEWORK: MONITORING AND EVALUATION FOR REVITALISING REDESDALE**

A suitably qualified and experienced organisation / individual is required to support the evaluation of the Revitalising Redesdale Landscape Partnership (RRLP) scheme. The evaluation needs to capture the impact of both individual projects and of the Partnership scheme as a whole. The consultant will work with the programme team and partner organisations to collect the evidence required. The consultant should ideally be familiar with HLF guidelines for Landscape Partnership Scheme Evaluation and the HLF Strategic aims against which RRLP will be evaluated.

The evaluation will explore the extent to which (and how, why and when) RRLP's outcomes have been achieved. It will look at the quality of project delivery using our outcome indicators to evaluate the scheme's value and significance to the area's natural and built heritage and communities.

The evaluation will need to be able to identify both planned and unanticipated outcomes of the scheme, identified in the LCAP as success indicators. The lessons learnt will be discussed with the focus group and partners and be used to improve service delivery and quality. Qualitative feedback comments will also be invited, recorded and fed into the evaluation process.

It is intended that a formal evaluation report will be produced to meet the needs of HLF and other funding partners, together with a well-designed accessible report summarising the scheme's strengths/successes, as well challenges that can be used with future funders as part of Revitalising Redesdale's legacy. In addition, a short film will be produced to include case studies around the key achievements of the projects which can be used in a celebration event at the end of the programme.

Much of the evaluation data (e.g. photographs, questionnaires, feedback and film footage) will be collected by the Revitalising Redesdale Team, as part of the monitoring programme, but the Evaluation consultant will need to inform this process at the inception of this contract.

### **Specific Requirements**

- Review of baseline information collected during the development phase of Revitalising Redesdale
- Monitoring and evaluation reports aimed at the Revitalising Redesdale Board and its partners reflecting on findings of:
  - initial 2 years of the scheme's delivery (January 2018 – 31 December 2019);
  - 3 years (1 January – 30 June 2020);
  - 4 years (1 July – 30 June 2021);
  - and 5 years (1 July – 30 June 2022).
- An accessible well designed end of scheme evaluation report for wider circulation supported by a short film presentation which can be shared with the local community and which will be available on the Revitalising Redesdale website via YouTube.
- Guidance on the development of a Legacy Strategy and a development of this at 36 months
- Support to the RRLP Manager and Board in writing a Legacy Strategy at 36 months
- Advice to RRLP Manager and Team on how delivery of the scheme can be improved / changed to maximise the impact of the programme and project outcomes, relating to HLF outcome requirements and working towards a sustainable legacy from the scheme achieving heritage, environmental and economic benefits.

- Attendance at 5 Board meetings to present the work of the contract.
- The successful consultant will be asked to provide an independent and objective view and to work in liaison with the RRLP Manager, Officers, Board, other local stakeholders and partners as required.

### Scope of the work

- The LCAP document can be viewed on <http://revitalisingredesdale.org.uk/our-submission-to-hlf/> including an Executive Summary. The LCAP is both an operations manual and business plan for the delivery of the RRLP scheme and a hard copy will be available to the successful contractor. It includes outline project plans for the 12 projects.
- The specialist's role is to provide expert analytical skills, knowledge, advice and the listed outputs, to ensure that RRLP is completed successfully, meeting all funder requirements and outcomes and leaving a sustainable legacy.
- Work with the RRLP Manager and Team to support them and ensure that appropriate methods for collecting monitoring data are set up and appropriate. Monitoring should be informed by HLF guidance on evaluation of Landscape Partnership Schemes [www.hlf.org.uk/HowToApply/goodpractice/Documents/LP\\_Evaluation\\_guidance.pdf](http://www.hlf.org.uk/HowToApply/goodpractice/Documents/LP_Evaluation_guidance.pdf) and strongly based around the:
  - Outputs and Outcomes of the 12 projects as described in the LCAP
  - Outcomes of the RRLP scheme as described in the Vision and Objectives within the LCAP
- Work with the RRLP Manager and team at each review period to support legacy planning and report on this in the 3, 4, 5 year reviews. Legacy planning should be strongly based around the recommendations of HLF document on Legacy Planning for Landscape Partnerships: [www.hlf.org.uk/HowToApply/goodpractice/Documents/LP\\_Legacy\\_Guidance.pdf](http://www.hlf.org.uk/HowToApply/goodpractice/Documents/LP_Legacy_Guidance.pdf)
- Provide a review report and assessment of the projects that have taken place, and the overall delivery of the scheme, at 2 years; 3 years, 4 years and 5 years of the Scheme's delivery

These could include, e.g.:

- review participant feedback collected during the programme delivery phase
- review community engagement during the programme delivery phase
- review all volunteer feedback collected during the programme delivery phase
- review area or length of habitat created or restored
- obtain views on the scheme as a whole from all stakeholders, including staff; Board members; delivery partners; volunteers; communities
- review publicity to gauge what has and has not worked well
- review development of any existing or new community organisations resulting from the scheme that may form part of the legacy

Develop objective and realistic advice and guidance, based on the above assessment, on changes / improvements / new ways of working for the scheme delivery, to provide direction for the RRLP team in forward planning, ensuring the scheme target outcomes are met and a sustainable legacy is achieved.

- Provide outputs as identified in the specific requirements section
- Maintain regular contact with RRLP Manager and provide update reports, as required.
- Work closely with RRLP Manager to ensure recommendations from the assessments can be executed.
- Work with stakeholders and partners and ensure full and objective assessment.

### **Required Experience**

Competencies of the chosen consultant should demonstrate:

- Monitoring and evaluation of Heritage Lottery Landscape Partnership Schemes (LPSs), or other large multi-partner, multi-funder Projects
- Legacy planning for Heritage Lottery Landscape Partnership Schemes (LPSs), or other large multi-partner, multi-funder Projects
- Excellent knowledge of (i) agencies involved in LPSs, (ii) Heritage Project management, (iii) good knowledge of local geography and partners
- Current knowledge of trends and policy drivers in Heritage management
- Understanding of practical delivery issues in multi-partner/multi-agenda Schemes
- Experience of delivering similar programmes or projects for HLF funded Schemes
- Understanding of long-term impact of heritage investment on jobs and growth.
- Good communication skills, including working with local communities

The proposal should be as brief as possible whilst demonstrating:-

- An understanding and summary of the tasks
- Proposals on working with RRLP team to achieve:
  - Heritage Outcomes
  - Legacy Planning
  - Sustainable Economic and Environmental Outcomes
- The approach and methodology proposed.
- A work plan including a schedule of tasks, timetable and milestones.
- Value for money.
- Expertise in undertaking similar work.
- Costs including a breakdown of role, day rate, number of days working on the project, purchases, travel costs and other expenses.
- What systems you have in place to ensure that you can meet the deadlines – e.g. who you will collaborate with in case of illness or other delays.
- CVs of staff involved (2 pages max).
- Contact details of two referees who can be contacted to confirm the consultants' expertise, experience and track record.
- Risk assessment
- Any other information that the consultant considers appropriate, which will demonstrate their suitability to deliver this work

The client will require consultants to include proof of employer's liability insurance cover in the sum of at least £1million.

## **Project Management**

The work will be commissioned by the Revitalising Redesdale Landscape Partnership. Day to day management of the contract will be the responsibility of the RRLP Programme Manager.

The consultant will report to the Programme Manager immediately if there are any un-foreseen delays which may limit the ability to complete the work to schedule.

- As part of the contract, the consultant is required to attend meetings with the Programme Manager:
  - i. Inception meeting with the Programme Manager and other appropriate stakeholders e.g. Board Chair, for an initial briefing to agree the scope of the project and identify any operational difficulties that might be encountered, and to review baseline data help by Revitalising Redesdale collected during the development phase.
  - ii. A minimum of 5 progress meetings over remaining course of scheme.
- Specialists are required to submit draft reports for comments before any report is finalised.
- The RRLP Board requires 2 hard copies and a digital copy (in MS Word and PDF format) of all final reports. A copy of any presentation materials used in the final report, meetings or seminars (slides, overhead projection transparencies, etc.) will be required by the RRLP Board for retention.
- The RRLP Board will hold the copyright on the work and its publication (including copyright on the brand and design). The report or the information from this research cannot be quoted from or used in any other project work without the written permission of the Programme Manager.
- Any information supplied by the Programme Manager, Board, partners or stakeholders to the consultant during the works must be returned no later than one month after the end of the contract period.

## **5. Price and Payment Schedule**

- The total cost for delivery of this work is to be no more than £15,000, excluding VAT.
- The cost of publishing the Evaluation report designed for wider circulation will be met by Revitalising Redesdale, but the design of the publication should be included within this quote.
- All prices should include any necessary mobilisation, transport, labour, materials, fuel, plant charges, insurances, data processing, provision of results and quality control and all other expenses of every kind which, under the Conditions of Contract, are to be borne by the specialist.
- Costs should be inclusive of all staff and sub-contractor costs.
- All prices shall be stated in pounds sterling and exclusive of VAT.
- The schedule for payment will be agreed at the inception meeting. Phased payments are anticipated, weighted towards the final 12 months.

## MONITORING AND EVALUATION FRAMEWORK

Success Indicator/ outcomes	Evaluation Activities	Report	Film
<b>The heritage landscape is better managed /in better condition as a result of Revitalising Redesdale</b>	<p>Before and after photos</p> <p>Site reports, including of designated sites/monuments.</p> <p>Feed-back from landowners and members of the community</p>	<p>Photographs</p> <p>Summary of feedback on particular sites from evaluation</p>	<p>Photos and short film</p> <p>Quotes- talking heads/interviews</p>
<b>The habitats improved or created to benefit Redesdale’s species, are in better condition as a result of Revitalising Redesdale</b>	<p>Before and after photos</p> <p>Species records, habitat site reports with evidence of areas created /improved, management plans.</p> <p>Feed-back from landowners and members of the community</p>	<p>Photographs</p> <p>Records tables</p> <p>Summary of feedback on particular sites from evaluation</p>	<p>Photos and short film</p> <p>Quotes- talking heads/interviews</p>
<b>More volunteers are monitoring and recording Redesdale’s heritage landscape which has led to a better understanding/improved data for the area</b>	<p>Evidence of monitoring records</p> <p>Attendance at survey events</p> <p>Feedback from ERIC and other data specialists.</p> <p>Use and engagement with the RR website’s inter-active pages</p> <p>Feedback from stakeholders.</p>	<p>Summary of records collected</p> <p>Quotes from specialists- ecology, archaeology and local history</p>	<p>Cast studies showing impact of monitoring- links to heritage discovered and trends in ecology</p>

<p><b>Individuals have developed skills as result of being involved with Revitalising Redesdale</b></p>	<p>Feedback questionnaires to all volunteers involved in RR.</p> <p>Attendance at courses/ training certificates</p> <p>Feedback from programme staff/volunteer supervisors</p> <p>Feedback from partner educational establishments.</p> <p>Detailed feedback from individuals</p>	<p>Photographs</p> <p>Quotes and feedback from individuals</p> <p>Case studies of what volunteers have achieved</p> <p>Quantitative summary of questionnaire results, training achieved.</p>	<p>Photographs and short film of volunteering in action</p> <p>Quotes and talking heads</p>
<p><b>More local people and visitors and a wider range of people have been actively engaged in exploring Redesdale's heritage and landscape.</b></p>	<p>Record of RR events and volunteering activities.</p> <p>Feedback from stakeholders on numbers visiting key sites within the valley.</p> <p>Downloads of digital information by visitors</p> <p>Short interviews with visitors at key sites</p>	<p>Quantitative summary of record of events and volunteering opportunities and digital downloads.</p> <p>Summary of evidence provided by stakeholders and information from visitor interviews.</p>	<p>Photos/ film of events</p> <p>Quotes/talking heads</p>
<p><b>Revitalising Redesdale has indirectly helped local businesses</b></p>	<p>Feedback from local businesses, including accommodation providers.</p> <p>Assessment of proportion of contracts let to local businesses</p>	<p>Summary of feedback provided</p> <p>Case studies of individual businesses</p>	<p>Photos</p> <p>Case studies</p>