

Derbyshire Historic Buildings Trust – Saving our Heritage for Everyone

EVALUATION CONSULTANT

Brief for the commissioning of an Evaluation Consultant

1.0 Introduction

The Derbyshire Historic Buildings Trust (DHBT) is seeking the support of an Evaluation Consultant in conjunction with their National Lottery Heritage Fund (Heritage Fund) project, 'Derbyshire Historic Buildings Trust: Saving our heritage for everyone' (here on in referred to as 'the project'). The successful consultant(s) will be engaged to develop an evaluation framework for the project and provide a full evaluation for the project over a 20 month period.

Purpose of Brief

The purpose of this Brief is to define the project and the role of the Evaluation Consultant.

Key Contacts

The Client role for this project will be exercised through the Trust's Project Manager/Executive Officer, Lucy Godfrey.

Supporting Documentation

The following information is available on request:

National Lottery Heritage Fund application

Project Timetable

2.0 Project Background

Project Summary:

Our project will provide the capacity for us to make changes, promote collaborations and develop our assets:

B@R (Aims: A property portfolio to sustain the Trust; Active supporters, including volunteers; Engaged stakeholders/community leadership)

The West Midlands Historic Buildings Trust have created a Buildings at Risk (B@R) app which is accessed by registering with Mergin Maps. Volunteers then undertake a digital training session, which introduces the app and how to undertake a basic condition survey.

The current functionality of the app includes mapped points of all listed buildings across the area with Grade II buildings as active points. Volunteers undertake a basic condition survey of these buildings in-line with Historic England's at-risk assessments and can pinpoint other buildings on the map and suggest them for local listing.

We'll jointly develop the app by testing it in a new geographical area; exploring how it can be exported from QGIS in formats appropriate to different end users and identifying what additional functionality is necessary.

We'll test the app in Amber Valley Borough Council and Derby City Council (minimum – we also hope to complete Erewash BC and Derbyshire Dales DC) and engage people (including young people, those on low-income, people with mental ill-health and ethnic minority participants) with this process.

Outputs:

- * Creation by volunteers of a regularly updated and maintained B@R register for at least two local authorities.
- * A tested, functioning app that defines our geographical area and holds our database of historic buildings.

DHBT Academy and Skills/Training (DHBT Academy to inspire, inform, support; Structures/people able to deliver our vision)

Through research and development, we'll identify possible local areas and buildings where we could deliver live on-site training and theory classes. We'll establish a framework for how to best offer practical training for those who'd like to work in the heritage sector. This will include providing paid placements for trainees working on heritage skills projects at our HQ, Hopkinson's House (Wirksworth).

This would be in conjunction with the development of the DHBT Academy, offering support and guidance to historic building owners/custodians when identifying and facilitating the appropriate courses of action and care.

Craftspeople and suppliers will be encouraged to join our Crafts Register. We'll also re-purpose online information previously held by the NHTG to support the Academy and to meet our aim of becoming a knowledge repository and educational resource.

Outputs:

- * A framework for how we'll deliver practical training opportunities.
- * List of local areas/buildings where on-site training and theory classes could be delivered.

* Launch of the DHBT Academy including the re-purposing of the former NHTG resources.

Developing Assets (Raising our profile through events and communications; Active supporters including volunteers; Fundraising to deliver our vision)

We'll progress to using the paid-for version of the CRM 'Donorfy' to develop our supporter and wider communications (leading to greater sustainability and streamlined working). Donorfy provides more functionality around audience segmentation and monitoring charity income. It will be more accessible for all at DHBT (empowerment) as well as taking care of GDPR and simplifying other policy/procedural workflows.

The approved purposes of the project are:

Develop a framework for delivering theoretical and practical heritage skills training to be delivered at sites across Derbyshire, including paid traineeships.

Develop and deliver 6 Heritage Trainee Placements over the lifetime of the project.

Develop and deliver a range of activities to raise DHBT's public profile, including a Conservation and Heritage Skills Festival in 2024.

Evaluate the project in line with National Lottery Heritage Fund requirements.

High visibility acknowledgement of the National Lottery Heritage Fund on site, online and in all activities, as well as using your project to acknowledge and thank National Lottery Players.

Launch and develop the DHBT Academy; provide guidance and resources for use by historic buildings custodians. To include resources from the National Heritage Training Group.

Obtain a 2-year subscription to CRM system 'Donorfy', to explore fundraising opportunities and improve communication with stakeholders.

Promote and encourage membership of the Derbyshire Crafts Register.

Recruit a Heritage and Skills Coordinator, 0.6 FTE, 2 Years.

Recruit a Heritage Development Officer, 0.8 FTE, 2 years.

Recruit a Volunteer and Administration Coordinator, 0.3 FTE, 22 months.

Take proactive measures to be inclusive, remove barriers to access and reach new and diverse audiences through the delivery of this project.

Take steps to improve the accessibility of DHBT's website and online resources.

Test and develop an existing map-based app created by West Midlands Historic Buildings Trust. Work with volunteers to create a register of listed and at-risk buildings within two local authority areas: Amber Valley Borough Council and Derby City Council.

The project outcomes are:

We will involve a wider range of people.

People will have developed skills.

The funded organisation will be more resilient.

3.0 Evaluation Consultant(s) Specification

An experienced Evaluation consultant is required to help create an Evaluation Framework for the project, and to help train the staff and volunteers to carry out ongoing evaluation; collecting data that will be useful to contribute to helping to measure the project's success and to suggest improvements. Over the period of the project (due to complete at the end of February 2026), the consultant will produce an interim report at the mid-way point and a final evaluation report at the end.

The Evaluation Framework and its delivery will have an important role in ensuring the project team are able to evaluate the successes, challenges, and learning of the project.

The consultant will be expected to:

Work with the Project Steering Groups and the wider project team to develop a monitoring and evaluation framework for the project (e.g., a logic model/framework for measuring outcomes and impact), which will be able to support robust evaluation and establish key baseline data.

Develop an evaluation toolkit for use by the delivery team and support them in using it.

Use the Evaluation Framework to review the project against the Heritage Fund outputs/outcomes and enable the capturing of ongoing evidence of success and project outcomes at the mid-point and end of project. It will also assist in defining and clearly articulating the vision and aims of the project. The Evaluation Framework should be built around the vision and aims of the project and should be designed to facilitate formative (continuous) as well as summative (at the end of the project) evaluation.

Existing Guidance

The following source offers guidance on evaluation of National Lottery Heritage Fund projects:

<https://www.heritagefund.org.uk/publications/evaluation-guidance>

The Consultant

It is expected that the appointed consultant will be able to demonstrate that they have the following experience, skills and knowledge:

Previous experience of producing Evaluation Frameworks and delivering them for Heritage Fund projects

An understanding of heritage projects

Excellent communication skills and the ability to work with a wide range of people

Experience in the charity sector.

Reporting

The consultant will be responsible for reporting at regular intervals and at key stages to the Project Steering Groups, to be agreed with the Project Manager.

Budget and Further Details

The total **maximum budget** for the external evaluation is £20,000 (excluding VAT). Please note that this figure should include all associated costs including travel and expenses. A payment schedule will be agreed at the start of the contract. The contract is expected to run from July 2024 – February 2026 (86 weeks/20 months).

If you are interested in this work, please provide the following information:

The way you will approach the work

Details of members of your team (if applicable), with an explanation of individual roles and responsibilities

Experience of similar work, including examples, where appropriate, of experience of evaluative research in a heritage setting

Experience of working with different stakeholders

A proposed timetable of your work, considering the project timetable submitted with this Brief

Costings to carry out the work, including a daily rate and work plan

Confirmation of Professional Indemnity and Public Liability Insurance.

Please email the required information to Lucy Godfrey

(lucy@derbyshirehistoricbuildingstrust.org.uk) by 5pm on Monday 1st July. We expect to interview shortlisted consultants on Thursday 4th July. **Please also contact Lucy for any of the supporting documents referred to in this brief.**

www.derbyshirehistoricbuildingstrust.org.uk @dhbtrust