

Heritage Places – Development and Collaboration Framework

Consultancy Brief for Services

Angela Glithero, Director, Strategy, Economy and Communications Directorate

New Procurement CBiT Outline – **Heritage Places: Programme Evaluation**

Tender Quotation Opportunity

The City Council is seeking to appoint a specialist adviser to undertake a programme evaluation role, in support of the Heritage Places Collaboration (Development) Project. Providing monitoring processes/feedback reviews and delivering mentoring advice at key phases/milestones during the programme – including the coordination and completion of a Final Evaluation Report.

Further Information on the Opportunities

The National Lottery Heritage Fund (NLHF) recently announced the start of a 10-year journey with Stoke-on-Trent, through their new Heritage Places initiative, as one of the first nine places (out of a total of 20 areas across the UK) set to benefit from a share of £200m – targeted to unlock the potential of the city's heritage.

Against this backdrop, Stoke-on-Trent City Council have been awarded grant funding from the NLHF to support the development of a Heritage Places Framework – aimed at envisioning a shared focus and refreshed approach to heritage regeneration across Stoke-on-Trent – that will guide the delivery of future funding/project pipelines and integrated heritage master-planning.

This grant award presents a unique opportunity to widen ownership of the Heritage Places scheme beyond the City Council – reconnecting people with their social and built history. By enabling more residents/stakeholders to benefit from, and be involved in the regeneration/future sustainability of their environments, towards building a shared holistic approach around cultural heritage placemaking.

The programme evaluation role will be an integral process before, during and post-completion of the Project. Both through a monitoring process and as a mentor (critical friend) to all aspects of programme delivery – including/against the NLHF Approved Purposes and expected outcomes.

Services (Additional Information if Required)

Provision of an ongoing programme evaluation process – to include: -

Inception/Programme Management:

1. Engagement with the Project Sponsor/Project Lead, NLHF Adviser/Monitoring Officer, (relevant) City Council officers and key partner/voluntary

- organisations as required – in order to refine the brief of undertaking and ensure it meets the requirements of the NLHF grant Approved Purposes;
2. Agreement and creation of an evaluation timetable and programme in line with the project plan/monitoring requirements set out in the NLHF grant conditions and complete progress reports as required (see Appendix A);
 3. Agreement and setting out the deliverables, capturing and confirming the Approved Purposes and programme outputs/outcomes.

Programme Delivery:

4. Establishing an evidence baseline at the project initiation stage (i.e. demographic/economic and social capital data analysis etc.), towards determining qualitative and quantitative project mechanisms;
5. Developing/facilitating a Theory of Change (TOC) process to establish the basis for the collaboration/evaluation framework (i.e. audience profile/causal analysis);
6. Undertaking and presenting mentoring (critical friend) advice and monitoring feedback/reviews at key phases and milestones during the programme duration;
7. All agreed processes will be supported by/shared with the Consultation Programme and aligned to the on-site engagement activities (led by the specifically-appointed project Community Engagement Networker). As well as acknowledging (where relevant) and referencing against other concurrent community engagement programmes;
8. Ensuring that links are created with/to the development and support of the digital participation platform (see Appendix A) – particularly in relation to profiling feedback monitoring and relevant (lessons learnt) case studies /benchmarking.

Programme Evaluation:

9. Collation of baseline audience/stakeholder profile data at the beginning (inception) of the programme – and then ongoing to form the next stages of the consultation/engagement and mapping activities programming (Phases 1 and 2);
10. Support the provision of a training (tool-kit) for staff teams/volunteers and partner organisations – on how to collect/monitor data throughout the project;
11. Completion of the Evaluation Final Report (at Phase 3) – including monitoring before, during and post-completion of the programme. With sign-off/support from the Project Sponsor/Major Project Board/NLHF – shared with key stakeholders/partners and across national organisations;
12. 'Lessons Learnt' presentation/workshop and Case Study publication for dissemination across the wider national Heritage Places Programme;
13. Programme closure.

Tender Documents and Quality Cost Split

Tendering organisations are requested to draft a short **method statement** explaining their approach to the commission, comprising written descriptive document, no more than 2500 words, with an appendix that includes/contains a **CV** of every person whom would play an active role on the commission. A separate appendix should

include and set out an **organisation structure and approach** with the named lead single point of contact for the commission and services.

Organisations should also state their services available within the **£10,000 for the Programme Evaluation** in the form of a **fixed price tender** submission. Fees should be inclusive of VAT but should include all disbursements and fees and expenses required to deliver the services (travel, subsistence, overnight stays, IT equipment, mobile telephony etc.).

VAT should be calculated and shown separately.

All information should be submitted on the procurement portal, and should be uploaded and sent to the City Council by the dates shown and indicated in the form of tender.

The Price Quality Split is: Quality 70% (35% Method Statement & 35% Organisation Structure), and Price 30%. Value for Money, or MEAT/Most Economic Advantageous Tender, will be calculated on this basis, with a recommendation being made through to the appointing Project Lead Officer on this basis.

Timetable for Procurement

The intention is to commence the consultation programme from October 2024 towards completion of the Final Evaluation Report by July 2026 – aligned to the three phases of the programme (as outlined within Appendix A) and subject to the NLHF grant Approved Purposes, project deliverables and project management structure/processes.

- Out to Tender: 27 August 2024
- Return from Tender: 17 September 2024
- Tender Evaluation: 18 September 2024
- Outcome Notice: 24 September 2024
- Mobilisation: 1 October 2024
- Appointment: 7 October 2024

Appendices

For information and reference when tendering for these services.

Appendix A:

NLHF Key Grant Extracts

Project Summary

Project Name: Heritage Places: Collaboration Framework

To undertake Programme Evaluation in support of the Heritage Places Collaboration Framework, towards envisioning a shared focus and refreshed approach to heritage regeneration across Stoke-on-Trent. To guide the delivery of future funding/project pipelines and integrated master-planning, aimed at creating/delivering a city-wide Heritage Places scheme – through the following delivery programmes: -

Main Project Scope:

- Commissioning an extensive stakeholder engagement/mapping exercise across the city; convening and involving key stakeholders. Exploring where there are potential synergies with existing heritage priorities/programmes and current key national partnerships. Towards identifying/profiling innovative approaches, through existing/new collaborations and sustainable investment opportunities, around community-led heritage placemaking.
- Undertaking in-depth consultation/engagement with communities in each of the six towns, by developing and embedding more equitable opportunities for active involvement/participation. Providing/launching both a new digital platform (dedicated to citizen participation) and organising on-site activities; via exchange forums, workshops/action-delivery events and focus groups. Where relevant, these will be in partnership with existing community (grass-roots) organisations/volunteering networks, linked to other proposed cultural/heritage mapping/consultation processes.
- Identifying/supporting smaller voluntary organisations and community groups engage with, and/or deliver, scoping/mapping sessions. Ensuring that the engagement process is both balanced and accessible.
- Developing/delivering advisory/mentorship sessions (responding to current identified needs) for small community/voluntary groups and organisations. Support mechanisms could include: guidance around the preparation of funding bids/business cases (for small/discrete capital heritage-based projects); advising on funding resources (i.e. online grant-finders) and workshops on developing organisational capacity/expertise (to deliver long-term financial planning).

Main Project Focus:

- To support the development of a Heritage Collaboration Framework, with the aim of achieving a town/city-wide vision/focus and approach to heritage placemaking; aligned to the (revised) City Council Corporate/Economic Development Strategies and current regeneration sites/projects.

- The focus is around initiating greater community empowerment (including with non-heritage/under-represented groups), towards encouraging an increase in local knowledge/identity and experiences in connection with heritage and place. To be undertaken in tandem with a proactive dialogue around various aspects of cultural/heritage policy/provisions, with particular reference to inclusive business models/partnership options and the economic role of SMEs in this process.

Project Approved Purposes:

Take proactive measures to be inclusive, remove barriers to access and engage new and diverse audiences through the delivery of this project.
Mapping exercise with stakeholders and partners.
Provision of a fundraising resource and/or mentoring targeting small groups and organisations - building capacity, expertise and fundraising know-how.
Consultation with communities in and across the six Towns - a. Creating a new citizen led and focused digital platform – potentially Decidim b. Deliver on-site activities to facilitate consultation (led by a specifically-appointed Community Engagement Networker).
Linking to existing/emerging cultural and regeneration initiatives: a. Heritage Steering Group b. Heritage Strategy c. Establishment and development of a new Heritage Trust
Provide 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.
Partner with voluntary organisations and community groups to facilitate scoping and mapping exercises with communities they serve.
Co-create a shared vision and strategic roadmap to guide future heritage regeneration funding and programmes: a. To support the development of a fundraising plan/pipeline of potential heritage/placemaking projects b. To support the submission of potential heritage/placemaking project grant applications.

Post Project Deliverables:

The Project has been designed to create a delivery mechanism – that once established, will be sustainable in terms of the resources and capacity-built over the (two-year) Project grant programme. These will include:

- Provision of a comprehensive (shared) heritage resource/database
- Hosting of a cultural/heritage (places) focused citizen participation platform, for continued collaborative content/participation with communities/stakeholders, accessible and delivered online.

- Development of a (cultural/heritage) fundraising support toolkit, in conjunction with current community-based voluntary/philanthropic delivery support/resources.

The outcomes of the Project will be maintained through the aligned development/launch of a Heritage Strategy for Stoke-on-Trent.

Who will be the beneficiaries of the project?

The project will promote inclusion as its core ethos. Encouraging more people to engage with/around heritage projects/programmes across the city and within the towns, initially through audience development work and community engagement/consultation activities/events. Specifically, to understand the barriers to access for people underserved by heritage – i.e. targeting people from a wider range of ages, ethnicities, social backgrounds, more disabled people; and groups of people who have never engaged with heritage projects/programmes before.

What difference will the project make?

It will provide the City Council, in partnership with key delivery stakeholders, the additional resources and capacity to undertake in-depth consultation with communities and residents, towards expressing/evaluating and communicating their views on (existing and future) heritage-led policy provisions/direction.

By building a mechanism that provides a Heritage Collaboration Framework for scoping discussions and generating ideas around future heritage placemaking; across business, voluntary/community organisations and residents over the longer-term. Particularly, working with/across non-heritage and under-represented communities – as well as seeking to reset relationships/partnerships with existing cultural/heritage stakeholders. Strengthening routes to collecting and analysing/visualising experiential data, will be a first step towards placing people at the heart of the decision-making process.

Key Partnerships

Throughout this Project, the City Council will act as the anchor organisation, collaborating/working with a consortium of diverse partners, alongside the Creative City Partnership (CCP) and Heritage Steering Group (HSG), in seeking to widen ownership of the Heritage Places scheme across the city. With the direct aim of enabling a more coactive and joined-up partnership approach, towards developing the skills/expertise, capacity and innovation to sustain and revitalise/manage heritage across Stoke-on-Trent.

The Project will initially be brought forward by a core group of partner organisations, providing insight and expertise to support the development of the evidence-based consultation/engagement framework, including:

Stoke Creates: City Cultural Compact (CCP/HSG member);

Re-Form Heritage: Locally-based charity/restoration/rejuvenation of heritage buildings at risk/Middleport Pottery (HSG member);

Staffordshire University: Affiliated to Stoke Creates/Made in Stoke (philanthropic remit)/potential partner re-participation platform (HSG member);

Canal and River Trust: Various re-development projects (CCP member);

Staffordshire Wildlife Trust: Transforming the Trent Valley Landscape Partnership Scheme;

Stoke-on-Trent BID: Independent business-led/funded organisations/partnership working re-improvement of a defined commercial area (HSG member) ;

Arts Council England: Key funding/support for National Portfolio Organisations across Stoke-on-Trent (CCP/HSG member);

Historic England: Key funding/support for the HAZ programme/buildings at risk (CCP/HSG member).

What are the key milestones for the development and implementation of the programme?

(September 2024) Tender Brief – Announce tender opportunity

(October 2024) Consultant Appointment

(October 2024) Project Inception – Initial meeting and baseline to agree outputs

(November 2024) Commence planning/development of an outline collaboration framework and engagement delivery mechanisms. Aligned with/to the community engagement and activity programme

(November 2024) Undertaking of initial (baseline) research for the evaluation framework – towards establishing a reliable evidence base for the change process and audience/stakeholder profiles

(December 2024) Confirmation/procurement of a citizen participation platform

(November 2024 – February 2025) Collation of baseline audience/stakeholder profile data – to in/form the next stages of the consultation/engagement and mapping activities programming (Phase 2)

(January – March 2025) Soft launch/testing of the confirmed participation platform

(November 2024 – March 2025) Development (detailed planning) and confirmation of the main Project activities/programming – including the Evaluation Framework/TOC process

(March – April 2025) Review of the Project Plan (Phase 1: Development/ Consultation) and updated with the proposed detailed Main Project activities/events and programming for Phase 2

(April 2025 – March 2026) Launch of the Main Project activities/events and programming for Phase 2 – aligned with the Evaluation Framework/TOC process and including the formal launch of the digital participation platform

(April 2025 – ongoing) Formal launch of the participation platform

(September – October 2025) Completion of the community engagement and activity programme – including a closure report/case study (to feed into Phase 3: Evaluation)

(April – June 2026) Review the delivery of the overall Project aims (at Phase 3) – aligned with/to the Approved Purposes and stated programme outputs/outcomes

(July 2026) Completion of Final Reports and Launch of Heritage Strategy

Ends