

Activity and Interpretation Plan Consultant Brief

Introduction

Union Chapel is looking to recruit an experienced consultant or consultancy to help create and deliver an Activity and Interpretation Plan for Union Chapel's National Lottery Heritage Fund funded project called *Sunday School Stories – a tale of dissent and social change*. There is a particular focus on developing new young audiences.

We are open to consultants and agencies applying for both our Activity and Interpretation Plan and Evaluation Plan opportunities.

Organisation Background

Union Chapel is an inspiring space. It is an architectural treasure that is home to an inclusive church, award winning gigs, a unique organ and The Margins Project for those homeless and in crisis in London.

The Board of Trustees have developed a strategic masterplan to repair the cathedral scale building and bring all areas into public use. *Sunday School Stories* is the first phase in this multi-phased project and is at the heart of the masterplan – uncovering the stories that will weave together the future phases.

Project Background

The Sunday School is the central of three Grade II* listed buildings erected against the east end of the Grade I listed Union Chapel. The whole complex was designed by James Cubitt and completed in 1877.

The Sunday School room was designed in an Akron style plan, with the main hall surrounded by a beautiful gallery to three sides and supported by cast iron columns. The galleries contain original open alcoves/booths and library that allowed one single teacher to supervise various classrooms at the same time.

The heritage this project will focus on is the bond between nonconformity, liberalism and social change in the context of the Union Chapel Sunday School and the impact and significance it had on the lives of the communities who built it. The activity and interpretation plan is weighted more heavily towards activities and audience development than physical interpretation.

The new audiences the project will focus on are:

- under 13s
- local community groups
- local vulnerable families
- 16-25 year olds
- migrant and refugee groups
- Islington LGBTQ+ community

Overall Project Aims & Outcomes

- Repair, conserve and open up the Sunday School creating a multi-purpose heritage, creative and community space
- Catalogue and preserve the 200 year old collection, make it publicly accessible and put in online
- Create a dedicated space within the Sunday School to house the collection
- Develop heritage activity, volunteer programmes and partnerships to significantly broaden opportunities for engagement with local people, especially young people.

Physical/Fabric

- Repair the physical dilapidation
- Insert discreet, eco modern services
- Insulation put in to improve energy efficiency
- Relevant kit, equipment and storage available for wide range of uses

Heritage

- Transformation of the collection of papers, artefacts and memorabilia into a publicly accessible collection
- Team of volunteers created to manage the collection
- The lost stories contained within the collection will be revealed through a three year participatory programme
- The project will engage new young audiences that currently do not come to Union Chapel
- Inspiration and skills are acquired through activities that are focussed on training, relationship building and confidence building
- Two new part time roles will be created; an Archivist and a Participation Co-ordinator

Activity and Interpretation Plan Specific Aims, Outcomes and Outputs

- Reveal the Sunday School's hidden heritage to the wider public through high quality and innovative interpretation materials, online and onsite
- Introduce new audiences to the Sunday School heritage through a wide range of activities online and onsite - focussing on local young people
- Catalogue, preserve and house the collection on site
- Engage volunteers and trainees in specialist activities
- Introduce audiences to conservation and craft skills
- Ensure the newly developed space is busy, popular and sustainable
- Pioneer new practices in sharing heritage
- The Sunday School is established as a centre for cultural and creative learning and ideas exchange – a 'nonconformist academy' for the modern day.
- Free and accessible learning resources are available for schools and the public.
- A new home is created for the scholarly body of work concerning nonconformist architecture, liberalism and congregationalism
- A resilient ongoing heritage and community programme is created through specific expert human resources, strong volunteers, relevant equipment and an updated maintenance plan

- There is greater public access to the heritage – such as a well designed online catalogue and digital images of the collection on our website, with blog entries, films and associated interactive visual aids - such as an online timeline.
- Audiences have an increased awareness and understanding of Union Chapel's heritage

The Brief

Sunday School Stories is currently in the Heritage Fund development phase, following the first round pass awarded in December 2018. We are now seeking to appoint a consultant or consultancy to co-ordinate the production of a detailed three year Activity and Interpretation Plan for submission as part of a Round Two funding application to the National Lottery Heritage Fund.

Union Chapel has a community development framework that guides the principles and values of community activity and measuring success. *Sunday School Stories* sits within this framework alongside current activities and our homelessness project, Margins. Based on this framework the consultant will undertake:

Partnerships

- A review of current activity: Map the contacts, networks and partnerships that Union Chapel already has and research potential new connections within the scope of the target audiences
- Consultation with the partners identified in the Round 1 application and further local consultation with local schools, youth groups, Islington Council and other relevant organisations with a view to understanding barriers to access and how to mitigate them
- Designing template partnership agreements as part of the plan, and an approach to partnership development for the organisation for ongoing sustainability of the partnerships
- Identifying any critical training and development needs of the partners in being able to implement the plan

Audience Development

- Audience research, including local demographics, baseline setting and collection and analysis of data. Produce summary reports based upon findings. Review our existing user information such as in house visitor data and feedback from previous participants
- A review barriers to access including physical, sensory, intellectual and economic and make suggestions on how to mitigate them
- Designing the agenda and content for three meetings of the internal stakeholder group and three meetings of a wider stakeholder group. These groups will meet in response to the proposed activities and design. The consultant will design the way the meetings are run to achieve optimal feedback from participants. The consultant will review the findings from the consultations and distribute to the Design Team and stakeholders as appropriate. The consultant will be expected to attend at least one of each group type meeting. The meetings will be co-ordinated by the Head of Fundraising and Development.
- There will be one full public consultation led by the Design Team on 29th and 30th September. The consultant will be expected to have input into the way the consultation is run to ensure optimal feedback.

- Develop a plan for a positive action training initiative to address diversity in the delivery of the participation programmes from the start of the delivery phase
- Develop a ‘Welcoming Environment’ training programme for new and existing staff for realisation with the opening of the Sunday School to the public
- Produce an analysis on how the activities and interpretation of the project will result in the increased understanding of the heritage of the Sunday School
- Identify the options for ensuring sustainability of the physical outputs (such as exhibition materials) after project completion
- Advise on the role description for the new Participation Co-ordinator, to be appointed at the start of the delivery phase, who will lead on the delivery of the activities and manage partner and participant relationships
- Review and support the creation of the action plan for the delivery of the range of activities and programmes

Volunteers

- Undertake a review of current volunteering opportunities, with a focus on the quality of these opportunities and on participants’ aspirations in respect to these opportunities
- Advise on relevant updates for the current volunteer policy and the volunteer recruitment strategy
- Develop ideas for how to reach a wider volunteer network and provide better quality opportunities
- Develop a management strategy for ongoing volunteer and training participation beyond the completion of the project. The current proposal aims to recruit 30 collection specific volunteers and to train a further 200 people in various skills from building crafts to public speaking by 2022

Collection development

As part of the development phase Union Chapel is commissioning a scoping document from a qualified archivist to inform this section of the plan. The scoping document will outline the significance of the collection and a plan for its preservation and future accessibility. Using this scoping document and with consultation with the Friends of Union Chapel (current carers of the collection) and further expert advice if needed, the consultant will provide around one day’s consultancy to review the programme and ensure it sits well within the overall plan. The programme will cover:

- How volunteers will be recruited, trained and maintained
- Methodology for the co-curation of a festival style exhibition between the archivist, volunteers and participants
- Costings for the digitisation process
- A method of collecting oral histories and ephemera
- A training plan for the collection volunteers that includes:
 - How to build and run collections
 - Preparation
 - Cataloguing
 - Exhibitions
 - Learning materials
 - Learning the heritage of Union Chapel
 - Answering public enquiries

- Understanding policies
- Object handling
- Paper conservation

The programme will detail the role of the Archivist (to be appointed at the start of the delivery phase), this role will include

- Involvement in the recruitment of the volunteer team
- Management of the volunteers and the associated activities
- Timescale of making the collection accessible – if only in part – by the opening of the Sunday School
- Creation of an acquisition and disposition strategy
- Creation of a records management and retention policy including accessioning for Union Chapel
- Creation of a preservation policy

Interpretation

- The current planned interpretation materials consist of pages on our website, an engaging free brochure, co-curated annual festival style exhibitions, posters, some display cases and through the outputs of various activities – such as paper conservation classes.
- Develop a methodology (with the Evaluation Consultant) to evaluate the effectiveness of the interpretation provision.
- Produce a written plan with the developed interpretation ideas including costings and specifications for the range of materials to be used.
- Review proposed digital outputs with a view to further development and relevance to target audiences.
- Advise on reasonable adjustments for interpretation such as sensory adaptations, use of sign language or tactile interpretation for hearing impaired or sight impaired people.

Budget

Support the creation of the activities, training and interpretation budgets by reviewing the current budget, looking in particular at:

- Recruitment costs for staff, volunteers, trustees
- Budgets for new activities
- Volunteer expenses, transport costs, childcare costs, training costs, protective clothing or health and safety equipment for trainees and volunteers
- Appropriate resources and support to ensure the active and regular involvement of learning disabled people
- Publicity & website
- Staff training

Dovetailing with the Activity and Interpretation Plan will be two other documents:

1. An Evaluation Plan which will contain a strategy and framework for evaluating the processes and outcomes of the project. This plan will be created and delivered with an expert consultant.
2. A Business Plan which will detail the sustainability of the project up to five years after the project has completed. This plan will also include suggestions for activity growth and

management after the five year completion period. This document will be produced in house.

There will be a fair amount of liaison between the Activity and Interpretation Planning, Evaluation Planning and Business Planning. There will be particular liaison with the Evaluation Plan consultant to agree activity specific evaluation and understand overall plans for project evaluation and the measures of success for engaging people.

This liaison will be co-ordinated by the Head of Fundraising and Development, however the consultant should put forward a suggested method of working together in their tender.

The plans should fully comply with current National Lottery Heritage Fund guidelines. The Activity and Interpretation Plan should be informed by and consistently focus on the Union Chapel’s target audiences.

Reporting

The successful consultant will report to the Head of Fundraising and Development, and attending occasional Steering Group meetings and Heritage Fund meetings as required.

Project Timescales

The work for all plans should be carried out between June 2019 and May 2020:

Dates	Activity and Interpretation Plan	Evaluation Plan	Business Plan
June to Oct	<p>Research, consultations and activity and interpretation development.</p> <p>2 x internal stakeholder consultations. 2 x wider stakeholder consultations.</p> <p>Skeleton plan creation.</p> <p>Collection scoping document produced by external consultant.</p>	<p>Research, consultations, creation logic model to set out the activities, resources and planned outputs and outcomes, undertake baseline study, draw up project specific KPIs, methodologies, plan review dates.</p> <p>Skeleton plan creation.</p>	<p>Review of current and proposed activities with a focus on new commercial and fundraised income streams.</p> <p>Industry and environmental analysis.</p> <p>Market and competitor analysis.</p> <p>Income and expenditure estimates.</p> <p>Organisational impact review.</p> <p>Skeleton plan creation.</p>
Sept	<p>Full public consultation 29 & 30 September led by Design Team</p> <p>Review with Heritage Fund</p>	<p>Full public consultation 29 & 30 September led by Design Team</p>	<p>Full public consultation 29 & 30 September led by Design Team</p>

		Review with Heritage Fund	Review with Heritage Fund
Nov	Review of skeleton plan by Steering Group inc 10 day review period for amendments and suggestions. Final internal stakeholder consultations. Final wider stakeholder consultations. 1st draft write up.	Review of skeleton plan by Steering Group inc 10 day review period for amendments and suggestions. 1st draft write up.	Review of skeleton plan by Steering Group inc 10 day review period for amendments and suggestions. 1st draft write up.
Dec	Review with Heritage Fund & UCP Board of Trustees.	Review with Heritage Fund & UCP Board of Trustees.	Review with Heritage Fund & UCP Board of Trustees.
Jan 2020	Internal review of 1st draft by Steering Group inc 10 day review period for amendments and suggestions.	Internal review of 1st draft by Steering Group inc 10 day review period for amendments and suggestions.	Internal review of 1st draft by Steering Group inc 10 day review period for amendments and suggestions.
Feb– March 2020	2nd draft write up.	2nd draft write up.	2nd draft write up.
March 2020	Full review with Heritage Fund and Steering group inc final 10 day review period for amendments and suggestions.	Full review with Heritage Fund and Steering group inc final 10 day review period for amendments and suggestions.	Full review with Heritage Fund and Steering group inc final 10 day review period for amendments and suggestions.
April– May 2020	Final write up for submission & approval by UCP Board.	Final write up for submission & approval by UCP Board.	Final write up for submission & approval by UCP Board.

Budget

Our budget for the consultancy is around £15,000 plus vat. There is some flexibility with the budget and the brief.

The estimated overall budget for activities is £358,836, inclusive of VAT and salaries.

The estimated overall budget for capital works is £1,300,000 inclusive of VAT and professional fees.

Tender Requirements

Please submit a proposal to carry out this project that covers the following:

- Previous experience of preparing and delivering successful Activity and Interpretation Plans for Heritage Fund projects

- Methodology for carrying out the work
- Timetable and breakdown of days for different activities
- Experience of working with heritage organisations, local groups and communities, especially audience development with a focus on young people
- Proven skills in community consultation
- Proven experience of working with large groups of volunteers
- Demonstrable understanding of the Heritage Fund process
- Two references
- Estimated project fee, plus estimate of reasonable expenses

We are open to consultants and agencies applying for both our Activity and Interpretation Plan and Evaluation Plan opportunities.

The proposal should be provided in electronic format only.

Our Criteria

The criteria for the recruitment of a consultant will include the following:

- Quality and experience
- Interview
- Methodology and approach
- Tender Price

Contact Details

Please email any questions regarding this brief to:

Frances Sterling, Head of Fundraising and Development

Frances@unionchapel.org.uk or call 020 3872 6017

Submission of Tenders

Submissions must be received by 9am, Monday 2nd June.

Interviews following week.