

## Evaluation Plan Consultant Brief

### Introduction

Union Chapel is looking to recruit an experienced consultant or consultancy to help create and deliver an Evaluation Plan for Union Chapel's National Lottery Heritage Fund funded project called *Sunday School Stories – a tale of dissent and social change*.

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 Evaluation Consultant will undertake:

- The creation of an in house logic model to set out the planned activities, resources and planned outputs and outcomes
- A baseline study
- The creation of project specific KPIs with staff and stakeholders
- Relevant data collection methodologies
- Development of a project evaluation framework
- Liaison with the Activity Plan Consultant and in house Business Planning team for suitable review dates to ensure dovetailing plans
- The creation of the skeleton plan and editing of final drafts
- Facilitate evaluation events / away days

The consultant will be involved in the final evaluation and will work with the project from beginning to end.

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

The successful consultant will produce a detailed Evaluation Plan for submission with a Round Two funding application to the National Lottery Heritage Fund.

This will include:

- Facilitating an initial staff, key stakeholder and Steering Group away day to inform our evaluation framework, determine our KPIs and data collection methodologies including manageable methods for recording our findings during the project
- Creation of a logic model for the organisation to use
- Gathering existing data from staff and stakeholder feedback and digital resources to undertake a baseline study
- Identify key places in the project for review and a process for an end of project evaluation that can be shared internally and with the wider public as an example of best practice
- Facilitating two annual away days after the delivery phase has started, with staff, trustees, stakeholders and participants to discuss the annual evaluation report, highs and lows, and how we can improve for the next year
- Provide clear, actionable conclusions and recommendations that can be shared with staff, trustees and stakeholders.

Included in the project evaluation methodology must be ways to measure the following:

- The impact of our work on our community, participants and the wider public
- The impact of our work on our organisation
- Outcomes of our work against forecast outcomes and KPIs
- Outcomes of our work against our aims and objectives

The project will retain a level of flexibility in order to accommodate participants’ responses and re-focus activities where necessary.

We will invite similar archives and organisations to read our reports and visit us in person to share best practice and learn from each other.

*Dovetailing with the Evaluation Plan will be two other documents:*

A three year Activity and Interpretation Plan that will include extensive consultation during the development phase and offer a wide range of activities for our target audiences going forward. The methodology for evaluating each activity will be drawn into the activity plan by the Activity Plan Consultant, in liaison with the Evaluation Plan Consultant so that there is seamless overall project evaluation.

A Business Plan which will detail the sustainability of the project up to five years after the project has completed. This document will be produced in house.

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 on Evaluation Plans, as set out in their *Evaluation Plan Guidance*. The Evaluation Plan should be informed by and consistently focus on the Union Chapel’s target audiences. It is a requirement that the successful candidate has experience of delivering successful National Lottery Heritage Fund Evaluation Plans.

### **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:

<b>Dates</b>	<b>Activity and Interpretation Plan</b>	<b>Evaluation Plan</b>	<b>Business Plan</b>
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>

			Organisational impact review.  Skeleton plan creation.
Sept	Full public consultation 29 & 30 September led by Design Team  Review with Heritage Fund	Full public consultation 29 & 30 September led by Design Team  Review with Heritage Fund	Full public consultation 29 & 30 September led by Design Team  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 £4000 plus vat for approximately 10 days work. 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 Evaluation Plans for Heritage Fund projects
- Experience of working and consulting with heritage organisations, local groups and communities.
- Proven skills in developing evaluation models and frameworks and data collection methodologies
- Proven experience of facilitating Boards and stakeholder meetings and away days to report on and review project evaluation
- Demonstrable understanding of the Heritage Fund process.
- Two references
- Fixed price project fee, plus estimate of reasonable expenses

**We are open to consultants and agencies applying for both our Activity 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](mailto:Frances@unionchapel.org.uk) or call 020 3872 6017

## **Submission of Tenders**

Submissions must be received by 9am, Monday 2<sup>nd</sup> June.

Interviews following week.