

Evaluation of the Pendle Hill LP Scheme

Brief for Mid Term and Final evaluations

1. Introduction

The Forest of Bowland Area of Outstanding Natural Beauty (AONB) is the lead partner of the Pendle Hill Landscape Partnership (LP), a National Lottery Heritage Funded project running from 2018 to 2022.

This exciting programme of activity looks to re-connect people with their landscape and their past, to safeguard the area's wildlife and heritage and to improve people's access to this popular countryside area. We will do this by providing opportunities for training and volunteering; by supporting research and devising digital interpretation to inspire a new generation about our heritage; by restoring important landscape features, and by working with communities to re-tell the stories of radical Pendle people. This programme will increase pride in this special place and raise aspirations amongst communities, and it will bring in new investment to support the environment and the economy.

The Pendle Hill LP scheme's vision:

'The PHLP scheme was established to restore, enhance and conserve the heritage and landscape of Pendle Hill, so that we can create a sustainable future for the environment, the heritage and our visitors. We will generate interest and understanding of the unique heritage of Pendle Hill through creativity, collaboration and collective action.'

The scheme has three themes:

- To improve the environment
- To build the local economy
- To provide opportunity for everyone to get involved

These themes incorporate 14 projects, and you can read more about these and the area and its heritage here www.pendlehillproject.com. The themes will be gathered together with a series of creative and digital threads, bringing the two sides of the hill together and inspiring and involving people in this special place.

1. Overall purpose and approach

The Pendle Hill Landscape Partnership invites tenders from suitably qualified and experienced organisations to support the Partnership in evaluating the Landscape Partnership Scheme (LP) at its mid-term (Spring 2020) and proposed end date (April 2022). The appointed contractor will subject the scheme to external scrutiny over this period, while also working with the Partnership to help develop a strategy for legacy. This process will enable us to:

- Demonstrate to the National Lottery Heritage Fund (HF), to other funders and to partner organisations what is being achieved
- Help us to maximise what we (and others) learn from the delivery of the LP.

2. Background

The Landscape Conservation Action Plan (LCAP) for Pendle Hill can be found at <https://pendlehillproject.com/reports-and-downloads>. This provides comprehensive information about the scheme. Some elements of the LCAP of particular relevance to this evaluation will be:

- The Scheme vision, with programme aims and objectives, and the three themes of work.
- The individual project plans, which identify individual project outputs and outcomes
- Sections on scheme legacy and the monitoring and evaluation framework that brings together project information in one place and identifies some Scheme outcomes for Pendle Hill. It is this framework that will be a key starting point for this piece of work.

Pendle Hill was awarded HF money under what was then HLF's 'Strategic Framework 4', and needs to be evaluated against the criteria and approach HF used when the award was made in October 2015.

Further information about current National Lottery Heritage Fund thinking on evaluation, including the 2018 Ruth Flood Associates review of completed projects and use of the Logic Model can be found here: <https://www.heritagefund.org.uk/publications/heritage-grants-programme-evaluation-and-outcomes-review>

2.1 Challenges in evaluating a Landscape Partnership Scheme

The Partnership recognises that the complexity of the scheme raises a number of challenges in terms of how it is to be monitored and evaluated. These include:

- Tracking the different outputs and outcomes will require a mix of quantitative and qualitative measures
- The scheme is more than just a set of discrete projects, and it is important that we are able to demonstrate ways in which the scheme as a whole is delivering more than the sum of its individual parts
- Monitoring and Evaluation activities must not take up a disproportionate amount of resource (in terms of either cash or staff time)

3. Mid-term review

During the spring of 2020 the Pendle Hill Partnership plans to carry out a formal mid-term review of the Scheme.

The purpose of this review will be to:

- Take stock of progress to date, informing partners of what is and what isn't working, and how far this is meeting the scheme objectives: providing a critical assessment which will be of value to funders the Board and partners
- Assist with the recording and reporting on HF Outcomes
- Assess the extent to which the Scheme's essential points of difference are being delivered, ie the creative, digital and engagement objectives

- Begin thinking about the Scheme's legacy ambitions and consider in more detail how these will be delivered. Legacy will need to be considered at both a scheme-wide level and in terms of individual projects
- Ensure delivery plans / management systems for the second half of the scheme remain fit for purpose

The consultant's role in the mid-term review will be to:

1. Produce an interim scheme evaluation

This will draw on:

- Quantitative and qualitative monitoring data collected over the preceding two years (in line with the M&E framework agreed during the summer of 2018)
- 'Output data' which the project team will need to compile to meet HF's reporting requirements
- Project documentation – in particular relating to delivery targets.
- Interviews with key individuals including project leads, the LP team, funders, partners and volunteers
- Selected visits to project delivery sites

The interim scheme evaluation will:

- Confirm what has been achieved to date, identifying what has been particularly successful, difficulties which have been faced, areas where delivery has not been achieved in line with expectations, and an assessment of expenditure and income compared to anticipated budgets and spending profiles.
- Provide an assessment of the extent to which the scheme is contributing to wider HF goals and the original aspirations of partners and local communities as identified during development of the scheme; and any new heritage needs identified since delivery began.
- Review the efficiency and effectiveness of scheme leadership and management; internal and external communications; engagement techniques; and of the role of the wider partnership
- Consider how the Scheme might have been managed differently during the first half of the scheme, presenting recommendations for any changes in governance, delivery and management during the second half of the Scheme.

The interim evaluation report will be reasonably concise (no more than c. 20 pages), incorporating photographs and diagrams etc. and will include a 2 page stand-alone summary document.

2. Providing support in the production of a Scheme legacy plan

This will involve working with the AONB, LP Scheme Manager, team, and delivery partners to identify and firm up legacy plans for individual projects and for the scheme as a whole. Such a plan will need to include a set of actions that need to be undertaken before and after the end of the scheme (2022) to ensure benefits of the scheme are taken forward.

3. Presentation to the Partnership Board

The contractor will be required to present their interim evaluation and the draft legacy plan to the partnership board for review and discussion.

4. End of scheme evaluation

The principal deliverable for this final tranche of work will be an evaluation report in line with HF's requirements (without which the final 10% of their contribution to the scheme will not be released).

NB this section of the brief is in draft only and may be adapted prior to 2022, this will be in consultation with the appointed contractor and may include creative consultation and/or working with an artist in residence.

The purpose of this review will be to:

Summarise what has been achieved and what has been learnt during the delivery period. Its audience will be the HF, LP Board, Partners and stakeholders.

The evaluation will:

- Tell the story of the Scheme, including individual project case studies
- Examine the extent to which the vision, aims and objectives have been realised, where the original ambitions and targets have been met (or exceeded), and where (and why) there may have been a shortfall
- Present an assessment of the longer-term outcomes and impacts beyond the end of the scheme, and of the plans in place to ensure this legacy is carried forward.
- Review the process of scheme delivery: how effective have the governance and project management structures been?
- What has been learnt – could things have been done in a different way, which might have been more effective?

Approach to be adopted:

The evaluation report needs to provide an honest assessment of the scheme, being open to both successes and failures. A collaborative approach with the project team and the partnership board will be needed in preparing the report. The final evaluation can draw on:

- The mid-term review
- A wide range of written materials including the original bid document to HF, the LCAP and supporting documents
- Monitoring data collected throughout the scheme delivery period, as outlined above
- Additional information and insights gathered by the consultant during the end of scheme evaluation period (February to May 2022) through consultation with a variety of participants, beneficiaries, partners and stakeholders
- Visits to sites around the scheme area

5. Invitation to tender

The LP invites contractors to tender for this work as follows:

5.1 Proposed Methodology

Consultants are invited to describe the methodology they would utilise in order to carry out both the mid-term and final evaluations of the Pendle Hill Landscape Partnership Scheme as outlined above. Please outline the research and consultation processes you would undertake in order to undertake effective reviews and to produce the following outputs:

5.2 Outputs

1. Electronic reports for both reviews, produced using the LP brand and of an appropriate file type and size for easy download
2. Appendices including the raw data from conversations and consultations held
3. A presentation of the above report to the LP Board and Programme Management Group
4. An interim scheme legacy strategy and action plan at mid-term, and a description of the main scheme legacy projects at the final evaluation stage.

5.3 Timescale

The successful contractor will be appointed by 31 January 2020, and the mid-term review will take place from March to June, with a final report prepared by August 2020.

The final evaluation is planned to take place from February to May 2022, with a final report due August 2022, although this may be delayed if the scheme is granted an extension.

Key milestones and payment instalments will be agreed with the appointed contractor

5.4 Contract price

You are invited to tender for this work setting your own fixed price for the two key areas of work, ie the mid-term and final evaluations. See below for details on how to submit your tender.

5.5 Criteria for choosing the successful tender

The successful contractor will:

- Show that they fully understand our requirements in letting this contract, and are prepared to work with us in a flexible way over the contract period to best meet our needs
- Have a track record of carrying out heritage based evaluation work, and in producing useful and readable evaluation reports. They will be able to demonstrate that the personnel who will be involved have appropriate skills and relevant background knowledge. In particular they need to show they are able to take a robust approach to evaluation even when this may mean making criticisms of their client organisation
- Show that they will be able to work effectively and in a creative way with the project team and the wider partnership, and where appropriate will take an innovative approach to the evaluation

- Demonstrate that they can carry out an objective analysis and make clear, realistic and positive recommendations
- Be able to justify costs and provide demonstrable value for money
- Have in-depth knowledge of the areas of work with which the landscape partnership is involved, including:
 - Knowledge of natural and historic environment policy
 - An understanding of working on a landscape scale
 - Experience of community, arts and health and wellbeing projects
 - Experience of training and education initiatives
 - Experience of working with our target audiences and in disadvantaged neighbourhoods
- Ideally the contractor will already have had some previous experience of working with HF's landscape partnership programme.

The contractor will also need to have:

- Excellent presentation, written and verbal communication skills
- Robust management and project management arrangements
- Commitment to equality, diversity and inclusion
- The ability to take initiative and work independently
- The ability to work with a variety of people
- A willingness to travel within the project area and adopt flexible working patterns

5.6 Management information

The project manager and the main contact for this evaluation work will be Cathy Hopley, Scheme Manager, Pendle Hill Landscape Partnership.

The Contractor will grant Lancashire County Council full copyright on all contents and materials produced. Where the Contractor makes use of material in which copyright vests in third parties, it will be the responsibility of the Contractor to obtain permission for the appropriate use of such material.

5.7 Agreement

We will set up an agreed proposal and methodology for the project at the inception meeting which both parties will agree and we will add you to the Lancashire County Council system as a supplier for payment – details to follow – from which a purchase order will be generated.

5.8 Submitting a tender

Your tender should be **no more than 20 sides of A4**, including CVs and appendices. This means you will have to be concise and focus on giving us information that is directly relevant to our 'criteria for choosing the successful tenderer' above.

Your tender should include:

- Name of tendering organisation
- Name of lead individual

- Contact details
- Names, positions and details of the relevant experience of staff to be involved in the evaluation, including day-rates. In particular please include information regarding projects they have delivered of similar scale and value
- Details of any relevant/similar previous or current evaluations in the last 3 years and how you meet the criteria and competencies listed in 5.5 above
- A brief statement detailing your understanding and interpretation of the purpose, context, specific objectives and scope of this work
- Two referees who can comment on your previous work
- A proposed methodology to deliver the required outputs, together with a clear statement of the cost of the work and details of the how this will be spent. Explain how costs will be divided over the two evaluations, and the roles different personnel will take in delivering the work
- A detailed work plan including proposed schedule of key tasks and milestones
- Price – including breakdown of day-rates and total number of days
- Legal status of the organisation/business, VAT registration status, health & safety statement and insurance cover

The tender should be submitted by **9.00 am on Monday 4th November 2019**:

Cathy Hopley, Scheme Manager, Pendle Hill Landscape Partnership, cathy.hopley@lancashire.gov.uk

Please mark your email 'Quotation: confidential'