

The Architectural Heritage Fund

Evaluation of the Heritage Development Trusts programme

Tender brief

1. Introduction

The Architectural Heritage Fund (AHF) is working with the National Lottery Heritage Fund (the Heritage Fund) as a strategic partner for a capacity building programme targeted at the heritage trust sector, working alongside the Heritage Trust Network and other infrastructure support organisations where required. This £5 million programme will provide capacity building support and project development grants to between 10 and 13 'Heritage Development Trusts' operating in locations of need and potential across the UK. This programme represents an expansion of a three-year pilot carried out from 2019-23 (see [Interim Report](#)); this pilot phase is currently being evaluated and the full results will be made available to the appointed consultant.

This programme of investment is intended to improve organisational resilience and increase the ability of the beneficiary organisations to acquire and maintain heritage assets in the long term for social and economic benefit within their communities. The Heritage Development Trusts will be expected to develop and maintain partnerships with relevant stakeholders in their local area, including local authorities, fostering an inclusive and place-based approach.

Starting in April 2023 and completing in September 2026, the AHF will design and deliver a funding and support programme targeted at third-sector organisations with the potential to become Heritage Development Trusts. The supported organisations will be selected through an open application process to assess their suitability for the programme. The successful applicants will be designated as Heritage Development Trusts and join the existing peer-to-peer network established by the AHF in England. They will each be awarded between £55,000 and £70,000 revenue funding per year, for up to three years, and benefit from a wide-ranging bespoke programme of consultant support to build their capacity to lead heritage regeneration in their local areas.

The programme supports the Heritage Fund's strategic objectives and will achieve the following four outcomes:

- the funded organisation will be more resilient;
- heritage will be in better condition;
- the local area will be a better place to live, work or visit; and
- a wider range of people will be involved in heritage.

We expect this investment to achieve the following aims:

- Show evidence of capacity growth in terms of trusts' organisational development. Trusts will be able to measure distance travelled depending on the status of existing local infrastructure. This may be from the absence of any third-sector organisation caring for heritage to the existence of a more resilient HDT;
- Develop trusts from being able to restore and manage an initial asset to creating solutions for a portfolio;
- Develop and increase trusts' local partnerships to widen the range and diversity of stakeholders;
- Demonstrate impact against the outcomes stated above;
- Demonstrate collaboration with other sector support organisations.

2. Project Brief

We wish to appoint an external evaluation consultant for the project. Working closely with AHF and the Heritage Fund throughout the project delivery period, the consultant will design and implement an evaluation plan to enable us to monitor and assess to what extent the project is achieving the programme aims described above. The consultant is expected to refer to the Heritage Fund's [Evaluation Guidance](#) in responding to the brief.

We expect the evaluation to be based around four main areas to report on the social, economic, and environmental impact of the programme:

1. **Project delivery** – To evaluate AHF's performance in delivering the programme. This includes meeting the spend targets in the budget profile, achieving the right balance of geographical and level of HDTs, the amount and type of specialist support offered to grantees, and the fair distribution of grants, in line with our Equality, Diversity and Inclusion policy. This quantitative information can be accessed through our internal database.
2. **Impact on the beneficiaries** – To assess evidence of capacity growth in terms of organisational development and the development of a portfolio of heritage assets, as well as the level of engagement and new partnerships with local stakeholders. We envisage this will be collected through the development of a resilience framework with a mix of self-assessment, discussion and interviews in relation to each Heritage Development Trust.
3. **Impact on local areas** – To evaluate the wider impacts of HDTs and the value they add to their local areas through the projects they deliver and the social benefits they bring, such as employment and skills, tourism, inward investment, new housing and community cohesion. While we appreciate that this is a large and complex task owing to the diversity of HDTs and how the outputs and impacts ripple out into their local areas, we would like the evaluator to build a toolkit or framework that allows the key outputs to be standardised to allow for impacts to be reported across the programme. In order to analyse the lasting impact of the HDTs' activities, this element of work should incorporate a longitudinal survey that will enable the gathering of data over ten years after the programme's completion.
4. **Deep-dive learnings from pilot HDTs** – To ensure the programme and its evaluation are maximising the insight able to be gleaned from the pilot phase of the HDTs, we wish to commission in-depth studies of the impact that three pilot HDTs have had within their local communities, including economic and social impact modelling on the change that HDT projects have fostered and interview-based insight into local perceptions of the value of conserved buildings and the role played by the HDTs. The chosen areas are: Great Yarmouth, Sunderland and Coventry.

The HDT initiative will run from April 2023 to September 2026, with the participating Heritage Development Trusts selected in December 2023. Baseline information will need to be collected at this point, alongside an evaluation framework for each organisation to start collecting the required information, to allow a final evaluation in September 2026.

3. Budget

We have allocated a budget of £90,000 for this work to cover the duration of the project (including expenses and VAT).

4. Timeline

The procurement timetable will be:

w/c 19/06/2023	Brief for services issued
17/07/2023	Completed tenders to be returned to AHF
20/07/2023	Interviews
28/07/2023	Contract awarded

5. Tender submissions

In terms of submitting a proposal for undertaking the work, this should include:

1. Details of your organisation, core skills, experience, and competencies.
2. Case studies/examples of specific projects you have worked on, supported with at least two references from clients.
3. Details of availability to undertake work distributed across the project period.
4. Evidence that professional indemnity insurance and public liability insurance is in place.
5. Details of how you would fulfil the project brief and the steps you would take to deliver the project to budget and timescale.

The selection criteria will include:

- Extent to which the tender demonstrates an understanding of the brief.
- Previous experience of delivering similar briefs, in a relevant field.
- Overall quality of the submission.
- Availability to deliver to timeline.

6. Contact details

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