



## Project: Fortifying the Future

### Brief for Evaluation Consultant



#### SUMMARY

Snodhill Castle Preservation Trust (SCPT) wishes to procure a consultant to develop an evaluation plan for Fortifying the Future, a resilience-based project funded by The National Lottery Heritage Fund, and work with the project team to deliver it. The project will take place over 3 years, it started in August 2024 and will finish at the end of July 2027. The maximum budget is £10,000, to include all expenses and VAT.

Proposals should be submitted to Project Lead Katherine Findlay PDF format by email at [katherine.findlay@snodhillcastle.org](mailto:katherine.findlay@snodhillcastle.org) by 11:59 pm on **Sunday 19<sup>th</sup> January 2025**

## **BACKGROUND**

### **Background to the trust**

The Snodhill Castle Preservation Trust (SCPT) is a registered charity established in 2016. The castle is located in Herefordshire in the hamlet of Snodhill, approximately 7 miles east of Hay on Wye and 15 miles west of Hereford. It dates from the C11 and is a designated scheduled monument of national importance, is rich in wildlife and enjoys a stunning, deeply rural, setting.

We hold the castle under a 999-year lease for the purpose of preserving it for the benefit of the people of the hamlet of Snodhill, Herefordshire and the nation. Since 2016 (with considerable grant aid) we have rescued the castle ruins from risk so that it is now a safe and beautiful place for people to visit as and when they wish. Our object is to discover more about the castle's lost history through research and archaeological excavation and to bring this knowledge, together with the site's natural history and interest to the public for their benefit and enjoyment.

We have 22 Trustees (mainly drawn from our hamlet's 12 households), a management committee of five (Chair, Vice Chair, Treasurer, Secretary & Heritage Adviser), a team of committed volunteers and over 300 Friends.

For more information about the trust and what we do please visit our website:

<https://www.snodhillcastle.org/>

### **Background to Fortifying the Future**

SCPT has achieved its first object, we now need to establish the castle's unique place in our national story so that we can engage more people in its future and ensure that it never reappears on a Heritage at Risk Register. We have no paid staff and currently rely heavily on the time and energy of the management committee. To 'Fortify the Future' we need to ensure the SCPT has a resilient infrastructure that can sustain a long term, holistic programme of research, exploration and engagement activity beyond the lives of its current trustees.

Using money raised by National Lottery players, The National Lottery Heritage Fund supports projects that connect people and communities with the UK's heritage. Fortifying the Future is a three-year project running to the end of July 2027 made possible with The National Lottery Heritage Fund. Thanks to National Lottery players, our project will fortify our future by:

Researching and understanding our existing audience and potential for growth consistent with the site's conservation by:

1. Commissioning an audience review and engagement strategy to engage wider, more diverse and new audiences.
2. Developing resources, collaborations/partnerships to deliver the engagement strategy.

Developing SCPT resources and reputation to maximise opportunities for engaging existing, wider and more diverse audiences and growing membership by:

1. Commissioning accessible content (including video) to transform our digital presence, reach and profile, create opportunities for digital volunteering, site interpretation and fundraising.
2. Creating an accessible, easy to use, SCPT archive to share and grow information about Snodhill Castle through collaboration with lottery players.
3. Commissioning and publishing historical research in association with specialist interest groups and universities, engaging both academics and enthusiasts.
4. Providing site facilities (water supply, WC, urinal, tipping taps and field shelter, Wi-Fi and 'tap to donate' equipment) so we can host a wider range of activities and events engaging a more diverse audience.
5. Telling local communities what we're doing by providing content for online community noticeboards and local parish magazines.

Holding events to sustain existing and engage new audiences by:

1. Running two community digs and open days.
2. Working to bring in non-traditional users by running volunteering projects (including for veterans, cadets, students & others).
3. Collaborating with The Cart Shed and Family Place Foundation to deliver 'green care therapy' at Snodhill for adults and children facing disadvantage who would otherwise not be able to access the site (Appendix 1.)
4. Collaborating with Hereford's New Model Institute of Technology & Engineering (NMITE) to use the Castle as an educational and volunteering resource for engineering students (Appendix 1).

Developing SCPT infrastructure to improve efficiency, maximise resources and build resilience by:

1. Creating an accessible, digital, filing and information management system, calendar and email group to improve efficiency, access, transferability and to maximise our resources.
2. Formalising and improving trustee and volunteer recruitment and induction processes, clarifying roles and responsibilities.
3. Commissioning a habitat & ecology survey with recommendations and an action plan to sustain and develop habitat, increase biodiversity with conservation priorities to inform a conservation management plan (CMP) and development of volunteer projects.
4. Commissioning an overarching CMP with policies for the castle's built and natural heritage, conservation priorities and a long-term maintenance programme. This will inform our strategy and future fundraising activities.
5. Updating our Business Plan and Strategy, adjusting our structure with emphasis on growing and futureproofing the Trust and fundraising to deliver the new strategy.

Investing in trustees and volunteers by:

1. Undertaking a skills audit, adjusting trustee/volunteer roles.
2. Providing training to fill skills gaps and develop members.

3. Writing and delivering a recruitment plan to recruit new trustees/volunteers to fill skills gaps & populate sub-groups.
4. Identifying potential new sources of volunteers and members and recruiting them.
5. Learning from organisations we collaborate with.

## **THE BRIEF**

SCPT wishes to procure a consultant to:

- Create an evaluation plan setting out a detailed methodology and programme for assessing the project's performance against the Approved Purposes\* of the funding, working with trustees and the Project Lead.
- Develop any tools or training necessary to enable SCPT's trustees to support the delivery of the evaluation plan
- Identify and communicate with trustees, volunteers, partners, stakeholders and participants who will engage with the project over its lifespan and create opportunities for them to participate in meaningful evaluation in appropriate and accessible formats
- Meet at least quarterly with the project team to review progress on evaluation and to draw lessons to improve the project from findings so far
- Collate and analyse the findings of project evaluation activities, present them effectively and draw conclusions
- Contribute to quarterly reporting to the project's Steering Group and The National Lottery Heritage Fund as required
- Produce an evaluation report towards the end of the project in 2027 which:
  - Tells the project's story of change
  - Meets the requirements and best practice guidance of The National Lottery Heritage Fund.
  - Includes lessons learned for SCPT

\* See the Project Management Plan for a full list of Approved Purposes.

## **Expertise and skills required**

- A successful track record in project evaluation that includes projects involving the conservation of built and natural heritage, community engagement, working with volunteers and delivery of activities.
- Experience working on medium-scale community/charity/volunteer-based grant-funded projects.
- Experience of evaluating projects funded by The National Lottery Heritage Fund
- Excellent communication and engagement skills.
- Experience of evaluating digital engagement would be beneficial.

## **CONTRACT MANAGEMENT**

The successful consultant will be appointed by the SCPT by letter and will report to the Project Lead.

**Timescale**

We expect the work commissioned to begin in February 2025 and be completed by 31/07/2027.

**Budget**

The maximum budget inclusive of VAT and expenses is £10,000.

**PROCUREMENT PROCESS****Proposal submission**

Please submit a proposal setting out:

1. Your approach and methodology for undertaking the evaluation.
2. What techniques and resources you would use to ensure that evaluation includes qualitative as well as quantitative measures of success.
3. What you anticipate as the key milestones.
4. Who and what groups you anticipate consulting.
5. The staff involved in each element of the work.
6. Two case studies of comparable projects undertaken by you or your firm, with dates and contact details to obtain references,
7. A cost breakdown (the total cost must include VAT if applicable and all expenses)
8. A proposed milestone payment schedule

Your submission should be no more than 4 sides of A4 in no less than size 11 font provided in a single bound PDF by email or cloud based transfer (WeTransfer, Dropbox etc) to Project Lead Katherine Findlay at [katherine.findlay@snodhillcastle.org](mailto:katherine.findlay@snodhillcastle.org) by 11:59 pm on Sunday 19<sup>th</sup> January 2025

**Procurement process**

The procurement timetable will be:

Issue of brief: 09/12/24

Proposal return deadline: 19/01/2025

Interviews: week commencing 27/10/2025

Notification of procurement decision: 03/02/2025

**Award criteria**

Proposals will be evaluated against items 1-7 in the above section on proposal submission and items 1-3 below.

1. The extent to which the proposal demonstrates an understanding of the issues related to this brief.
2. The degree to which the bidder has demonstrated the experience needed to successfully complete the work.
3. Value for money

**Please note:** the Fortifying the Future Project Management Plan is available on request.