



Invitation to Tender

Evaluation Consultancy for Capital Works and Activity Plan

1. Introduction

Since 2017, our Design Team has been working on capital development plans for Newcastle Cathedral's project, *Common Ground in Sacred Space* (a £5.9m proposal for capital works and activities which will see the **refurbishment and remodelling of Newcastle Cathedral's interior and exterior spaces**, including the installation of heritage interpretation, and the growth of the volunteering programme to support a wide-ranging activity plan). Further to an award of £4.2m from The National Lottery Heritage Fund in March this year, Newcastle Cathedral now wishes to appoint an Evaluation Consultant. This is to support the summative evaluation of the three year Activity Plan linked to the capital redevelopment of the Cathedral.

2. Background

Newcastle Cathedral is Grade I listed and dates back to the early 12th Century. Over its 900 years it has been at the centre of the civic life of the city as evidenced by the memorials and tombs which fill it and together reveal much of the heritage story of Newcastle and the wider region.

Our Vision is to bring 900 years of history into the 21st century by reviving the medieval role of our unique building as a distinct space for worship, civic events and activities. The transformed Cathedral will be a dynamic hub engaged with the community and business as well as a special place of prayer and spiritual discovery. In order to achieve this vision, we have developed the *Common Ground in Sacred Space* (CGISS) project and propose to make this vision a reality through focusing on the redevelopment of both the internal and external cathedral spaces and revitalising our staff and volunteer team to create broader and deeper engagement with audiences/communities (both current and potential).

The overarching aims for this project are:

1. The opening up of the nave to create a stunning open and flexible space for modern worship and community events amid a historic backdrop
2. The preservation (by relocation within the Cathedral), interpretation and display of the unparalleled collection of historic ledger stones in order to reveal their stories
3. To provide a radical welcome to an increased number of visitors and communities through an enhanced and empowered volunteer programme, and the creation of new visitor facilities in the Cathedral Hall complex
4. To reveal the history of the Cathedral and its role in the City through the centuries via new, engaging interpretation and activities
5. A complete refresh of the churchyards to create engaging spaces for relaxation, performance and activities
6. Provision of a programme of activities and events which will involve all ages in journeys of learning and discovery
7. **To stabilise and enhance the Cathedral's fabric through the replacement of the current ineffective and obsolete heating system in the Nave and the relaying of the floor in that area**
8. To develop partnerships to drive up awareness of, and engagement with, the heritage of the City of Newcastle and its wider environs, not least linked to the stories contained within the Cathedral itself
9. To develop a sustainable business plan for the operation of the Cathedral, based on an organisational step change to focus on resilience and management of risk

3. Brief for consultants

Newcastle Cathedral is working with stakeholders to develop a three year activity programme which includes activities during one year of capital works. The activity programme focuses on developing new audiences and raising awareness of the Cathedral as a distinctive heritage venue. Supported by four key project staff, the activity programme has five strands:

- a. Capital works – Revealing Spaces
- b. Learning programme
- c. Inspiring Spaces
- d. Interpretation
- e. Staff, Volunteering and Training

Full details of these strands, target audiences and planned activities can be found in the Activity Plan (available to tenderers). To enable the project to be effectively monitored and evaluated it will be divided into distinct units of project implementation. The boundary between each stage provides a natural decision point for feedback and review and is consistent with the reflective process of progressive problem solving and organisational learning known as action research.

Each element of the project will produce its own timetable of evaluation in line with the timescales laid out in the Master Programme. Some elements however run across the project life cycle, e.g. the volunteer and training programme, and therefore the evaluation timetable will reflect this.

The example that follows is an indicative timetable for the evaluation of this project.

		Specific strand reviewer	Coordinated project review by
May 2019	Project start-up		
2019 Oct/Nov	6 month review	Project Manager	Project Board
January 2020	Capital works start		
2020 April /May	Annual stage review Year 1	Project Manager & Project Support Officer	Project Board / consultant
Easter 2021	Cathedral re-launch		
2021 April /May	Annual stage review Year 2	Project Manager, Learning and Activities Officer and Volunteer Coordinator	Project Board / consultant
2021 Oct/Nov	6 month review	Learning and Activities Officer and Volunteer Coordinator and Project Support Officer	Project Board
2022 April /May	Annual stage review Year 3	Project Manager, Learning and Activities Officer and Volunteer Coordinator and team leaders, Director of Operations and Project Support Officer	Project Board / consultant
2022 Oct/Nov	6 month review	Learning and Activities Officer and Volunteer Coordinator and Project Support Officer	Project Board
2023 April /May project close	Year 4 Annual stage review and project close	Project Manager, Learning and Activities Officer, Volunteer Coordinator and team leaders, Director of Operations and Project Support Officer	Project Board / consultant

Key project outcomes include:

1 Heritage will be better managed

- An informed Chapter leading an effective and SMART operating model
- More staff and volunteer capacity to manage the building and grounds
- Improved building/monuments care through better environmental control and security
- Enhanced and accessible exhibitions and events in new uncluttered space
- Improved visitor experience through better interpretation, heating and toilet facilities

Focused income generating activity which creates a funding base by which our heritage can continue to be better managed and cared for long into the future

2 Heritage will be in better condition

- Replacement of a dysfunctional heating system with underfloor heating will much improve the **Cathedral's environmental stability to protect monuments, ledger stones, historic woodwork** and furniture; threats of burst pipes will be removed
- Repair and replacement of flagstones (not all original) will enable the Cathedral to receive a greater number of people without detriment to the flooring or to visitor safety.
- The relocation of vulnerable ledger stones will minimise long term risk to the collection. Those hidden under pews will be condition-checked for the first time.
- Modifications to the fabric of the building to form the east entrance and visitor services in the basement of Cathedral Hall will reveal and conserve architectural features.
- The historic churchyards will be returned to a condition suitable to set off the Cathedral architecture. **Ten neglected tombstones and coffins will be relocated to an architectural 'nook'** to protect them from erosion and defacement.

3. Heritage will be better interpreted and explained

Our project will transform interpretation and access **by unlocking fresh insight into the Cathedral's** heritage through informed and upskilled volunteers and new interpretive media. We will place particular emphasis on:

- volunteer-led interaction; programming and learning activities fully integrated into the visitor experience
- maximising opportunities for hands-on participation, refreshing of content and supporting resources.

We will measure the impact of our interpretation on knowledge and understanding, attitudes and values and enjoyment, inspiration and creativity through utilising Generic Learning Outcomes (GLOs).

4 Heritage will be identified/recorded

The project involves the following identification and recording of heritage:

- Recording of archaeological excavations prior to landscaping work
- *Finding the Norman Church* test pit excavations by university students
- Extensive recording of every stage of ledger stone removal and relaying; final inventory of new locations cross referenced to the 19th century floor plan.

5. People will have developed skills

A wide range of people will develop new skills including:

- Staff: resilience, brand values, financial awareness and income generation and collections management.
- Adults: heritage appreciation, art appreciation, photography
- Children: literacy, history and thinking skills to increase understanding and citizenship
- Volunteers and students: skills in research, care and conservation of heritage, creating learning resources and activities, employability skills including ICT, retail, hospitality

- Researcher and placements: practical skills (e.g.3-year PhD by practice, 1 year sandwich placement); new contacts, specialist knowledge and work experience
- Teachers, community group leaders, heritage professionals: interpretation of heritage, understanding heritage and practical art skills;
- Cathedral Trust: engagement, advocacy and fundraising
- Community leaders: learning to deliver self-directed visits for their groups.

Some of our measures for assessing the impact of our skills development programme include staff appraisal, volunteer recruitment records and tracker tool, visitor questionnaires and focus group work.

6. People will have learnt about heritage

- Bolder, more ambitious exhibitions and events will allow us to explore heritage themes in greater depth; more inclusive interpretation and improved learning facilities will satisfy different needs and learning styles of diverse audiences. Our talks, tours and events will offer students and adults the chance to engage in discussions around key issues.
- Public learning opportunities will extend to the development itself, particularly conservation and archaeological **ethics (skeletal evidence)**. **'Behind the scenes' activities will be** documented through staff blogs and photography.
- Through our formal learning programmes, 5400 additional pupils will gain heritage understanding and awareness.

7. People will have changed their attitudes and/or behaviour

Through greater reach and impact of our work, the project will empower people to take action in their own lives. Progression will be fundamental to the Cathedral, establishing a trusted space to which visitors return through different stages of their life. We will actively support visitor and volunteer interests and skills, through signposting to other organisations and by maintaining their relationship with the Cathedral.

8. People will have had an enjoyable experience

- More enjoyable visitor experience through better access and visitor facilities
- More welcoming, comfortable and user-friendly environment
- More people participating in the public programme
- More families enjoying fun and interesting events
- Targeted activities developed for young people, community groups and vulnerable people
- More people engaging one to one with volunteers
- More volunteers taking pride in their role and developing confidence
- More people providing positive feedback
- Return visits

9. People will have volunteered time

By diversifying our volunteer base, we will widen opportunities for all ages, abilities and interests, from running school visits to retail and governance. As a result of the project we will create an extra 17,395 volunteer hours for 96 new volunteers.

Due to the complex nature of the project, a combination of quantitative and qualitative methods will be used that will take account of the range of questions that need to be asked and different types of respondents taking part.

4. Outputs

The Consultant will work with Cathedral staff to develop:

- An evaluation framework, methodology and 3.5 year plan, which complies with the National Lottery Heritage Fund's Evaluation Guidance as a minimum (www.hlf.org.uk/evaluation-guidance)
- Written recommendations to the Project Delivery Board to inform the annual stage reviews and reports to funders, in particular the NLHF.
- A final summative project report which will encapsulate and develop previous annual evaluation reports and future actions, in the NLHF's required format (see Evaluation Guidance).

5. Budget and indicative timescale

A budget of not more than **£15,000 + VAT** is allocated for this contract including reasonable expenses. Payments can be scheduled according to an agreed timetable, but the client will withhold the final 25% until satisfactory completion of the contract.

- Issue of brief July 2019
- Appointment of Consultant August/Sept 2019
- Evaluation framework in place December 2019
- First annual review in April/May 2020
- Evaluation systems check December 2020
- Annual stage review April /May 2021
- Annual stage review April /May 2022
- Annual stage review/final report April 2023

The consultant should indicate how many site visits/meetings will be necessary to complete the work, in addition to the on-site start up meeting.

6. Project management, communication & resources

The consultant will need to liaise with the Project Manager, Learning and Activities Officer, Volunteer Coordinator, Director of Operations, Marketing Officer and Project Support Officer as required. Activity plans will be made available to the consultant as well as summative findings from six month reviews.

7. Publication and copyright

The consultant will give Newcastle Cathedral the copyright for the final report. Newcastle Cathedral and the consultant will have equal publishing rights.

8. Bidding requirements, process and award

Consultants interested in the project should submit the following:

- 1 An outline of the proposed approach
- 2 Track record of the bidder delivering similar or related work
- 3 Outline of proposed key milestones for the project
- 4 Details of the key personnel to be involved (including CV)
- 5 Costs to be charged (excluding VAT) and day rates of all personnel involved. Additional charges, e.g. for accommodation and subsistence, should be itemised.

The Cathedral will award this contract according to the following criteria:

- Price (30%)
- Experience (30%)
- Approach and methodology (30%)
- Adherence to Cathedral's tender terms and conditions (10%)

Bids will only be considered if they are received by email by the Project Manager, Lindy Gilliland, no later than **5pm 22 August 2019**. Emails **should be marked "Newcastle Cathedral Evaluation Consultancy"**.

Lindy Gilliland

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Informal enquiries can be made to Lindy Gilliland or Alice Massey at:

Newcastle Cathedral
Tel: 0191 232 1939

9. Payment

25% of the consultant's fee will be payable on commission. A further 50% will be paid at agreed stages of the evaluation and 25% on completion of the consultancy and related reports.

10. Accessibility

This brief can be made available in alternative formats if required.