



Invitation to Tender
Virtuous Circles 2 Project Evaluation
Date Issued: 30 January 2020

Closing Date: 21 February 2020

The client is Herefordshire Churches Tourism Group (HCTG). HCTG works in partnership with the National Churches Trust, the Churches Voluntary Tourism Association, Churches Conservation Trust, Shropshire Churches Tourism Group and closely with the Diocese of Hereford and Herefordshire Historic Churches Trust. There are close links to Herefordshire Council, Hereford Cathedral, and Herefordshire's Great Place project and the Herefordshire Sustainable Food and Tourism Partnership

Funded through National Lottery Resilient Heritage the prime focus of this innovative church tourism-based project is to create, across the counties of Herefordshire and Shropshire, sustainable and commercially viable activities that will give historic church buildings an opportunity to secure their financial sustainability and safeguard the buildings impressive heritage. This will be achieved through the development of quality tourism initiatives that will create new and enrich existing visitor experiences whilst retaining the integrity and respect for the buildings as places of worship.

The project recognises the need to focus not only on sustaining heritage buildings but also the needs of visitors and the volunteers who will make this happen.

The project has two innovative business focused and co-dependent activities:

- **Church Tourism:** capacity building and empowering initiative to encourage parishes and volunteers to develop a better understanding of how innovative engagement can maximise the tourism potential of church buildings. A key outcome will be a Church Tourism Handbook, as a national blue print, giving rural churches the guidance and resources required to realise positive tourism outcomes.
- **Virtuous Circles 2:** working with the Churches Conservation Trust to install an environmentally sustainable holiday accommodation pod for overnight stays in Turnastone Church. A key outcome will be a Design and Business Development Guide to support others in pursuing similar proposals in their own buildings.

HLF Project Outcomes

- Develop plans for the installation of an environmentally sustainable holiday accommodation pod in a church building. Produce a Design and Business Development Guide to support others in pursuing similar proposals in their own buildings.
- Develop a branding and marketing action plan.
- Develop and promote five themed bookable tourism experiences and promote them

- to overseas visitors.
- Develop a range of themed trails covering topics such as veteran trees, and poets, musicians and authors.
- Produce a jointly branded Church Tourism Handbook.
- Undertake a programme of 12 tourism training workshops delivered in support of church volunteers.
- Trial 10 contactless giving points and visitor counters in 20 churches.

Evaluation Specification

We wish to commission an evaluation partner to work with us (on a self-employed basis) to design and deliver the evaluation of this project. The project end date is July 2021 with evaluation completed by November 2021.

The evaluation should include both process and impact evaluation and we anticipate that qualitative and quantitative methods will be required. We would like to be able to measure how impacts on sustainable tourism initiatives can sustain church buildings in a way that is compelling for future funders and partners for similar projects and would welcome proposals for how this can be achieved.

1. Aims and Objectives of the evaluation

We require an evaluation that will primarily focus on the Church Tourism element of the project to:

- Measure the impact of needs of the main beneficiary group, Herefordshire and Shropshire Churches Tourism Group members
 1. %increase in visitor numbers
 2. %increase in overseas visitors
 3. % increase in membership of HCTG and SCTG membership
 4. %increase in church revenue
- Help us to understand how the project is having this impact, through a process evaluation primarily undertaken in testing the efficacy of tourism initiatives used to create incentives that attract additional visitors and income to churches.
- Help us to understand what the factors for success are in different settings and approaches and with different primary audiences.
- Identify key enabling factors and lessons learned from the project.
- Evaluate if professional and strategic engagement in tourism can lead to an **increase in visitor footfall, income and revenue**, and if the presence of **new technology** such as contactless giving points can lead to an **increase in revenue and income**.
- Record numerical outputs (to be agreed at the inception of the project).

- Evaluate if there is an **increase in the number of churches engaging in tourism activity**
- Evaluate the success of the **training and volunteer support** to church communities.
- Evaluate **increased sustainability** of the church tourism groups.
- Evaluate **attitudes to the project locally, in the media and online.**
- Evaluate and **benchmark visitor satisfaction**
- Identify the **barriers to volunteer engagement** and recommend methods to overcome them.
- Evaluate any **changes in attitudes** to tourism as a **source of additional revenue** to churches.
- Evaluate increased HCTG and SHTG website interest and activity through Google analytics from the start to the close of the project.
- Evaluate if activities have had a **positive outcome** for **community cohesion** and wellbeing.
- Produce an evaluation brief to include in capital funding bids focusing on the rollout of the accommodation pod model.

The evaluation should measure direct and indirect impacts of the project, as well as planned and unforeseen impacts where they occur. We are looking for an impact evaluation that meets standards of evidence for new sources of funding and decision-makers.

2. Evaluation approach

Please provide details of how you will approach the evaluation. The approach for the later stages of the evaluation may change according to the findings from the initial phases and so in your proposal you should focus on producing more detailed proposals for the first stages, with broad recommendations of how you would approach the further stages.

3. Audiences

The primary audiences for the evaluation are the Heritage Lottery fund, the Herefordshire and Shropshire Churches Tourism Groups and all volunteers who participate in the programme. We would like to understand the impact the project has on their resilience and church and tourism connections.

We are also interested in the impact on partner organisations and church participation both in terms of positive and negatives, for example resourcing pressures. However this is a secondary requirement and we expect that this information will be primarily qualitative.

4. Key considerations

We set out below some of the key challenges that we have identified for this evaluation.

However this is not an exhaustive list and we would welcome any additional considerations that tenderers wish to bring to our attention in their proposals.

- The evaluation strategy needs to take account of the skill set and needs of volunteers.
- Standards of evidence will be an important consideration to inform decisions about the structure of the evaluation required by different funders and stakeholders who may support further projects beyond the funding provided by the National Lottery Fund, Visit Britain, Discover England, and Destination Management Organisations.
- We will work with the successful tenderer to suggest relevant stakeholder groups to consult and to be familiar with standards of evidence expected by funders.
- Proposals should recommend an approach to collecting baseline data and measuring impact, including the potential for a controlled group design (e.g. matched control groups or randomised controlled trials) to ensure we are able to measure change and attribute it to the project intervention.
- Tenderers are encouraged to describe additional analysis that could add value to the evidence collected in the evaluation e.g. economic analyses, social return on investment/social impact analyses etc.
- There is considerable interest in the Virtuous Circles 2 project from many partners in the church tourism sector and further afield. It is possible that new Church Tourism groups or other projects will wish to use the project resources and get started before the national roll out of the Design and Business Development Guide and the Churches Tourism Handbook. The evaluation should therefore consider how and if this happens it can be captured in the formal evaluation process and the risks and opportunities presented.
- Virtuous Circles 2 is in part a learning by action project, with delivery taking place on a flexible basis at a local level. It is also co-created with participants and therefore will flex and develop as people's needs and wishes change over time. The evaluation needs to be able to consider this variance in approaches and the variety of data that will be captured in the process evaluation, while attempting to clearly understand which approaches are most effective with which audiences, in which locations and why. If it is not possible to generalise about specific approaches then we would expect the evaluation to provide principles for success to guide work in the future.
- Virtuous Circles 2 is a collaborative project. A Partners Project Steering Group is set up to inform project development and the successful tenderer will be asked to attend meetings on an as-needed basis. This may also be a useful group to pre-test propositions and approaches with in the first instance.
- Tenderers should outline any experience they have in evaluating partnership projects, working with steering groups and engaging users in developing evaluation approaches and methods.

5. Budget

The maximum budget for the evaluation of this project is £10,000 exclusive of VAT.

6. Tender requirements

It is requested that tenders do not exceed 8 pages in length in total (this is a maximum rather than a target length) and should aim to provide the following details:

- Details of the proposed approach
- Relevant information about the organisation
- The names and relevant skills and experience of people involved
- Time commitment to the project (in days)
- Timetable
- Arrangements for administration and management of the project
- Fee proposal and outline budget indicating a payment schedule related to key milestones.

Ethics: Tenders should address any anticipated ethical issues and problems and how these will be dealt with.

Data protection: Tenders should address any data protection issues identified and state how they will comply with current legislation.

Skills and expertise

Key things that we are looking for are as follows:

- Experience of and expertise in evaluation
- Experience of working with volunteers and community based initiatives
- Experience and expertise in collaborative partnerships and evaluating partner engagement in co-created projects
- Experience of evaluating or working with organisations developing new programmes and approaches to visitor and volunteer engagement
- Heritage and tourism sector knowledge

7. Costing

Project costs should be itemised under the following headings:

Salary costs for each project team member to be involved in fulfilling the contract (along with the daily rate and number of days input for each project team member)

Other administrative costs

Consultation costs

Travel and subsistence

Overheads (if applicable)

Costs should be exclusive of VAT and state whether VAT is chargeable. Full cost details of any proposed sub contracts and how these will be managed should be included.

8. Timetable

The timetable for the tendering process is as follows:

Tenders invited:

30 January 2020

Submission deadline:

The closing date for receipt of tenders is 5 pm, 21 February 2020. A full electronic copy of the tender including any annexes and supplementary material as part of one document, in MS Word or PDF format, should be emailed to:

wendy@visitherefordshirechurches.co.uk and jenny@visitherefordshirechurches.co.uk

Interviews: Monday, 2 March 2020

Project commissioned:

The contract will be awarded by 6 March 2020 and work will commence immediately, with an inception meeting held w/c 16 March.

9. Shortlisting procedure

Tenders will be evaluated on best value for money: the budget indicated for the project is the maximum budget available for the work, rather than a target spend. The key criteria for scoring the tenders are:

- How well the tender responds to the brief
- The robustness and suitability of the proposal
- Relevant skills and experience of the tenderer, including track record of producing similar work of a high quality and to deadline
- The adequacy and quality of proposed project management and risk management arrangements
- Overall costs

