



## **Crofton Beam Engines**

**Crofton, Marlborough, Wilts SN8 3DW**

**Tel: 01672 870300**

**A branch of The Kennet and Avon Canal Trust**

**Registered Charity No. CC209206**

### **‘Our Crofton Story’**

#### **Evaluation Consultant Brief**

##### **Background**

The Kennet and Avon Canal Trust owns and operates Crofton Beam Engines, a Grade I listed site featuring two early 19<sup>th</sup> century steam powered beam engines. Through its ‘Our Crofton Story’ project, supported by a significant grant from the National Lottery Heritage Fund (NLHF), the Trust has carried out capital repairs and improvements to the site, is renewing interpretation across the site, and is implementing an activity programme that will attract more visitors and volunteers, thus sustaining the heritage of Crofton for future generations.

Overall Delivery Phase project expenditure is around £700K, with NLHF grant of over £500K. Although the bulk of the expenditure was for capital works, a detailed Activity Plan also formed part of the successful bid for NLHF funding.

The Trust is in the final stages of the project, which started at the end of 2017. The main capital works, to repair and conserve the engine house building and to construct a new accessible toilet block, were completed before the start of the 2019 season. All remaining ‘physical’ deliverables, such as new interpretation panels and AV equipment, and a new play area, to be installed by the end of March, before the site opens for the 2020 season. Development of a new learning programme for Key Stages 1 and 2, and family activities, will be completed by the end of May, to allow time for completion of the evaluation report before the end date of the project (28 August 2020).

We have already started to develop the evaluation framework, based on the planned outcomes of the project as set out in the Activity Plan. Some initial feedback from visitors was collected last year, and this and other information (for example on volunteer input) is being collated by the project team. We are being assisted in this by a member of the Government Statistical Service under the Analytical Volunteer Placement scheme.

##### **Evaluation Consultant: the role**

We are now seeking to appoint a suitably experienced Consultant to play a key role in the preparation of the final evaluation report, and ensure it meets NLHF requirements.

The role of the Consultant will be to:



- review the outcomes set out in the Activity Plan, and the evidence of delivery assembled so far;
- summarise the capital achievements and project delivery processes;
- prepare an outline of the evaluation report and agree responsibility for drafting different sections with the Project Manager;
- advise on feedback to be obtained from visitors and other users of the site, to be collected in April-May 2020 and provide support to staff and volunteers to ensure that feedback is recorded competently;
- collate data and analyse to draw out successes and shortcomings;
- interview key members of the Trust and project team, a sample of volunteers and other key stakeholders on perceptions of project delivery and its impact on Crofton as a visitor attraction;
- arrange a small number of structured feedback sessions with site users, to be arranged by the Crofton team to a specification developed by the Consultant;
- draw out lessons learned from all of the above, and a set of recommendations going forward; and
- lead on preparing the evaluation report, and in particular draft Annexes summarising the interviews and feedback sessions and ensure that the whole report is in line with the current National Lottery Heritage Fund guidance.

To fulfil this role, the Consultant will:

- have, and be able to demonstrate, a good understanding of NLHF requirements for evaluation, and have a successful track record in evaluating NLHF-supported projects;
- have strong oral and written skills;
- be able to work flexibly, and to meet tight deadlines;
- show empathy with the staff and volunteers working for the Trust at Crofton and elsewhere; and
- command the confidence and support of the Crofton Management Team, staff and volunteers.

### **Reporting**

The Consultant will report to the Project Manager, Chris Bolt (who is also Treasurer and a Trustee of the Kennet and Avon Canal Trust).

The Project Manager chairs a regular Project Group, which includes all members of the Crofton Management Team. The Consultant will be invited to join that group to ensure effective coordination with staff and volunteers.

### **Contract timescales**

This is a freelance assignment, which will need to be worked flexibly over the period from appointment to delivery of the final evaluation report in August 2020.

To achieve this, we currently envisage the following main stages:

- appointment of Consultant by 6 March;
- detailed work programme agreed by 20 March;



- review and collect feedback, including interviews and groups during April-June;
- internal first draft of evaluation report by 26 June;
- second draft, for submission to NLHF for comment, by 10 July;
- final report by 21 August.

### **Budget**

The maximum budget agreed with NLHF for this assignment is £5,000 (excluding VAT if applicable), to include expenses.

The payment schedule will be agreed between the Consultant and the Project Manager before the consultancy agreement is signed.

### **Tender Instructions**

The consultant should respond to this brief by providing:

- a CV, in particular identifying work involving evaluation of NLHF projects and other relevant experience;
- the proposed methodology for delivering the brief;
- an estimate of the time required to complete the work, and a fixed fee proposal; and
- a daily rate for any agreed extension of the work to be undertaken by the Consultant.

Applications should be emailed to The Secretary, Crofton Branch, Kennet & Avon Canal Trust, Crofton Pumping Station, Crofton, Marlborough, Wiltshire SN8 3DW at [crofton.katrust@gmail.com](mailto:crofton.katrust@gmail.com) to arrive by **5pm on Friday 21 February**.

Any queries about this brief, or the appointment process, should also be addressed to Crofton branch Secretary at the above address.

### **Tender assessment process and programme**

We will wish to interview a shortlist of potential consultants in the week beginning 2 March. Interviews will be held at Crofton, and shortlisted candidates will have an opportunity to tour the site.

Tenders will be assessed against the following criteria:

- evidence of practical experience of undertaking National Lottery Heritage Fund/heritage project evaluation projects;
- understanding of the brief and the proposed methodology for undertaking this particular project;
- availability and capacity during the duration of the contract, and the amount of time to be spent on-site; and
- value for money.

We intend to make an appointment by Friday 6 March.



## Annex

### Key Relationships

**Project Manager**, a volunteer and Trustee with control of the project plan and working with the other participants to ensure complete delivery on time, and to quality and budget. The PM reports to the Trust Council on Project progress.

**Crofton Project Group**, a group of mainly volunteer staff, chaired by the PM and including members of the Crofton Management Team, which is responsible for ensuring timely delivery of the project plan.

### Other Participants in the Project

**Learning and Interpretation Delivery Consultant** who is responsible for finalisation, production, delivery, installation and commissioning Learning and Interpretation elements of the Project's activity plan to appropriate standards under management of the PM.

**Visitor & Site Manager** (existing employee), a heritage professional responsible for operation of the site and delivery of key elements of the activity plan. The Visitor & Site Manager is supported by a Heritage Site Assistant (existing employee).

**Crofton Volunteers**, who number around 60 people whose dedicated work enables the care and operation of Crofton. Their roles will change and increase as part of the project and their engagement and support needs to be gained and sustained.

**Mechatronics Working Group**, a small group of Crofton volunteers developing the Mechatronics Project (hi-tech monitoring of engines and systems), with input from students at the Atomic Weapons Establishment.

**Crofton Branch Management Team**, who are mainly volunteer managers, responsible for running of Crofton and for future sustainability of the outcomes of the project. This team is led by the Branch Chairman.

**Trustees of the Kennet and Avon Canal Trust** who have overall responsibility for custodianship of Crofton and are signatories to the agreement with NLHF for delivery of the project outcomes. Trustees consider the status of the Crofton project at their monthly meeting.