

## TENDER BRIEF FOR NATIONAL LOTTERY HERITAGE FUND EVALUATION CONSULTANT BRIEF



### INTRODUCTION

- This document forms the brief for the external consultant role of Evaluation Consultant for the purposes of managing the development phase evaluation of The National Lottery Heritage Fund supported capital works and community engagement activities at St Mary the Virgin, East Bergholt.
- With thanks to National Lottery players, we have been awarded a grant from The National Lottery Heritage Fund (hereafter the “Heritage Fund”) to carry out urgent repairs.
- Our project received a first-round pass by the Heritage Fund in October 2024.

### BACKGROUND

#### **The Project: Securing the future of St Mary the Virgin, East Bergholt**

St Mary the Virgin, East Bergholt is a large, Grade I Listed church (dating from 1350) in Suffolk in the Diocese of St Edmundsbury and Ipswich.

The church is rich in heritage:

- John Constable’s painting made famous the priest’s room, and the church features a Constable Memorial window, a memorial to his wife and his parents’ graves. These are important to art historians, those local to or with links to Suffolk.
- Features important to architects and campanologists include a tower begun in 1525 and never finished, for reasons unclear. This means the bells (the heaviest still rung in England) are housed in a cage and are uniquely pushed by hand (rather than pulled by rope).

# Securing the future of St Mary the Virgin, East Bergholt



East Bergholt Parochial Church Council (PCC) is listed as a charity with the Charity Commission (No. 1190273) and has 14 trustees who are responsible for the day-to-day operations of the parish of East Bergholt. Their duties include promoting the church's mission, managing church finances, advising church synods and fundraising. St Mary's is one of four churches that forms the benefice of Constable Country Churches – the others being at Bentley, Brantham and Tattingstone.

The Rector is Revd. Chris Willis. <https://www.constablecountrychurches.co.uk/>

The project will be funded primarily from The National Lottery Heritage Fund (Heritage Fund) following award of a Development Phase grant in October 2024. Capital works are expected to take place from 2027/2028

The chosen professional will work with us up to (and including) RIBA Stage 4 during the development stage for the submission of the Heritage Fund second-round bid.

## PROJECT BRIEF

The project comprises capital works and community engagement activities grant-funded by The National Lottery Heritage Fund and other funders. The current estimate for the project is £1,681,500 (excluding VAT), of which £910,000 is estimated for the capital works.

This project will form the first phase of capital works at the church and the installation of the new heat source (including any heat emitters that do not need to be installed for reasons of practicality at this stage) will form part of a second phase.

## OUTLINE TIMETABLE

### *Development Phase Key Milestones:*

Milestone	Date
First round pass awarded	October 2024
Permission to start completed	January 2025
Appointment of architectural design team	March 2025
Appointment of all project consultants	April/May 2025
Development Phase Review	April 2026
Final drafts of all documents	June – July 2026
Second round bid submission	August 2026

### *Proposed Delivery Phase Key Milestones (assuming August 2026 second round submission):*

Milestone	Date
Second round pass awarded	November 2026
Appointment of Heritage Learning Officer	December 2026
Activities Plan Delivery Starts	January 2027
Building works start	January 2027
Project Complete	During 2029

## PROJECT BACKGROUND

# Securing the future of St Mary the Virgin, East Bergholt



The two most recent Quinquennial Inspection Reports identified deterioration of the integrity of the church due to roof leakage and a need for urgent repairs. Pieces of brick and mortar have been falling down, and damp has penetrated the organ pipes. A survey revealed extensive evidence of death watch beetle, confirming that some timbers are very damp. There has been damage to the lime washed wall and plaques.

Two community consultations (in 2020 and 2024) showed a keen interest to preserve the church's heritage within the local community. There was also a desire for more people to be able to use the building and clear scope to better engage underserved groups e.g. people with disabilities, young people, parents, and carers and those experiencing loneliness and isolation. By restoring the church and developing its use, the local area would benefit, separate consultation with tourist guides supports this.

## **BRIEF FOR EVALUATION CONSULTANT**

We seek to appoint an experienced freelance Evaluation Consultant to develop an evaluation framework to measure the Project's proposed outcomes throughout the planned development phase. This should comply with the Heritage Fund's evaluation guidance with a clear and logical framework, and robust evidence and research methodologies.

This phase of the contract runs from May 2025 – December 2026.

Please note this role is remote but will require occasional site visits in East Bergholt, Suffolk.

## **JOB REQUIREMENTS**

- Work with the Project Team (Project Co-ordinator and Project Team) to create an evaluation framework and methodology from the outset, focused on both in-person and digital engagement and with the Heritage Fund objectives
- Evaluate the community engagement activities in the Development Phase to inform the development of Activity Plan evaluation in the Delivery Phase.
- Identify which elements of the framework the Evaluation Consultant will deliver and which the project staff/volunteers will deliver.
- Provide resources for staff/volunteers to gather data to meet requirements of the evaluation framework.
- Outputs /Deliverables
  - Analyse all the data to produce an interim evaluation of the Development Phase outcomes to support the Delivery Phase bid.
  - Undertake a final evaluation of the development phase at its close.

## TENDER REQUIREMENTS

The tender should be no more than 6 pages and include the following:

- a) proposed methodology and timescales;
- b) details of comparable experience, especially for Heritage Fund-funded projects;
- c) a fixed-price quote, explaining daily rates and VAT, and any anticipated expenses (for example, travel to East Bergholt);
- d) confirmation that the consultant/agency has the capacity to complete the work within the brief and to the agreed timescale;
- e) three references.

***We are looking for a consultancy which will deliver us consistency and at the highest possible level of performance.***

## TIMESCALE

We would like our consultant to start in May 2025 and have the completed report ready for us by September 2026.

## TENDER EVALUATION / WEIGHTING

Selection of the successful consultancy/agency will be based on:

- a) Proven experience of similar work at an equivalent level of complexity and significance, and demonstrable success at that level (25%) – *please note this will represent the first sift and tenderers not meeting this requirement will not progress further.*
- b) understanding of the brief, assessment of key issues and how objectives will be met (40%);
- c) methodology (15%);
- d) value for money/tender price (20%).

### **Scoring System**

- Parts a to c above will be assessed using the scoring mechanism below.
- Part d will be scored with the lowest bid scoring 5 (maximum score).

### **Score Meaning**

- 0 Point - Failed to respond to the brief correctly.
- 1 Point - Poor – Insufficient information and evidence provided to demonstrate that the tenderer has the ability, understanding, experience, skills, and resource required to provide the consultancy services.
- 2 Points - Acceptable - Response demonstrates some lack of understanding of requirement or evidence of ability to deliver; low risk that relevant resources will not be available.
- 3 Points - Good – Response provides clear evidence that resources and/or relevant experience are available and provides confidence that relevant ability, understanding, experience, skills, resource and quality assurance measures are available.
- 4 Points - Excellent – Above average response giving real confidence that the tenderer will provide excellent resources with relevant experience. Response identifies factors that will offer potential added value and provides supporting evidence.
- 5 Points - Outstanding - Exceptional demonstration by the tenderer of the relevant ability, understanding, experience, skills, resource and quality assurance measures required to provide the consultancy services. Response identifies factors that will offer potential added value and provides detailed supporting evidence.

# Securing the future of St Mary the Virgin, East Bergholt



- The Project Team are not required to appoint the cheapest bid but needs to include price within the evaluation to ensure a robust process and evidence of pursuing value for money through procurement.
- The Project Team will not cover costs associated with preparation of tender materials.
- Clarification interviews might be held, or the Project Team might decide to appoint based on the submissions alone.

## BUDGET

- There is an indicative budget for this work of £5,000 including expenses, but excluding VAT, for the Development Phase.
- A further budget of £10,000 including expenses, but excluding VAT, is allocated for the Delivery Phase, when a similar process will be undertaken for both the capital and the activity elements of the project.
- We would expect the bidder to work for us in the delivery phase as well, subject to a successful bid to the Heritage Fund and a successful consultancy performance review at the end of the Development Phase.

## MANAGEMENT OF THE COMMISSION.

- Day to day management of the commission rests with the Project Co-ordinator.
- Accountability will be to the Project Team

## SUBMISSION

- Deadline for tender submissions Tuesday 6<sup>th</sup> May 2025 at 8:00am
- Shortlisting submissions Tuesday 6<sup>th</sup> May to Wednesday 7<sup>th</sup> May 2025
- Interview dates Week beginning 12<sup>th</sup> May 2025
- Successful consultant notified Week beginning 19<sup>th</sup> May 2025
- Contract begins from June 2025
- The principal contact for the tender process will be Emma Browne, Project Coordinator [emmabrowne.stmarys@outlook.com](mailto:emmabrowne.stmarys@outlook.com)
- Tenders must be marked '**St Mary the Virgin, East Bergholt – Evaluation Plan Consultant Tender.**'
- Short-listed candidates may be invited to attend an interview process.

## ADDITIONAL INFORMATION

For more information about St Mary's East Bergholt please visit our church benefice website <https://www.constablecountrychurches.co.uk/>

More information can also be found on the history of the church, visit Historic England's website. <https://historicengland.org.uk/listing/the-list/list-entry/1193803>

We can provide the following information on request:

- The Heritage Fund development phase application
- The Capital Works Programme for the development phase, Business Plan and Management Team Structure.
- Activity Plan Tender Document