

Project Evaluation: INVITATION TO TENDER

From Foundation for Common Land (on behalf of the National Trust)

For Mid-Point and End of Project Evaluation

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Tender Submissions due by: 4/9/2022

Value of Tender

No more than £20,000 excluding VAT, including all costs including travel and overnight subsistence.

Introduction And Overview:

Commons are contested spaces, where divergent interests, overlapping legal rights and passionately held views can collide. However, the plurality of interests that makes commons complex spaces in which to work, has also made them exceptionally rich and varied places. Accounting for only 3% of England’s land mass, they account for 20% of its SSSIs, 40% of its open access land and 11% of its SAMs. Commoning is a living link to a land management system dating back to before the Norman conquest.

Now is a particularly difficult time for England’s uplands, and upland commons in particular: lockdowns have increased visitor numbers and changed visiting patterns on already pressured sites. The loss of Basic Payment Scheme (BPS) subsidies poses a significant threat to already marginal farm businesses, and ongoing uncertainty has undermined faith in the ability of successor schemes to support upland farming systems or to address biodiversity and climate crisis. While increasing polarisation between conservation and farming voices, is leading to a discourse of supposedly binary choices: production or rewilding, cultural heritage or natural heritage, farming or nature.

In this challenging space the Our Common Cause: Our Upland Commons project, a three and a half year, National Lottery Heritage Fund funded project, (lead delivery body: the Foundation for Common Land, accountable body National Trust) brings together 25 organisations in partnership to seek to secure collaborative, sustainable management of upland commons. The project has four aims:

* Secure and support collaborative management of Common Land
* Ensure that the health of commons is secured by supporting resilient commoning in a fast-changing world
* Reconnect the public with the natural and cultural heritage of Common Land
* Enhance the environmental and ecological benefits offered by Common Land

The project focuses on 12 commons, located in Dartmoor, the Lake District, the Yorkshire Dales, and Shropshire Hills, but the project also aspires to influence management of common land beyond these both regionally and nationally, sharing our learning across commons and organisations, and embedding collaborative working practices in partner organisations.

We are seeking a consultancy or contractor, who will understand this context, to carry out a project evaluation, which will help us understand the impacts of the project, capture lessons learnt to structure future projects, and support the projects wider influence on those involved in managing commons by sharing ways of working.

Specification

Mid Term Review

A light touch mid-term review focusing on two key areas:

**Supporting effective evaluation**

Working with the team to ensure we are gathering the right information and data, asking the right questions and have the mechanisms we need in place to support effective evaluation end of project evaluation, and to demonstrate to our partners the effectiveness of a collaborative approach to commons management. Effectively this element of the midterm review will form a plan for the end of project review, identifying what the project team and the consultant need to do between now and the review point. Although the prime focus of our evaluation will be around understanding the project’s delivery against its specific aims we will also need to gather the requisite information to ensure we can evaluate the extent to which the project meets NLHF’s general project aims.

Note: we do have an evaluation plan in place from the project development phase included with this, the consultant can build upon but should not be constrained by this.

**Maximizing impact, influence, and legacy**

Are we doing now those things that will enable us to make the long term impacts we want? Are we making the most of the opportunity to use the project’s delivery as a catalyst for wider improvements to the management of upland commons? How can we best work to embed our approach in partners who will influence commons management beyond the project’s completion? Are our project management processes governance and the decisions we are making supporting effective project delivery and legacy?

The intention is that the recommendations focus on how to make the most of or tweak the existing delivery plan rather than looking at radical change which could be difficult to sustain at this point in the project. It should also help the project identify the impact of changes already made in the project programme on overall outputs and outcomes, and improvements that could be made to project delivery, management, or governance.

Note: Although it is not part of the scope of the midterm review to report on this, it will also be useful to capture and record at mid-term, information that can be fed into the lessons learnt section for the end of term review, particularly thinking about the impact of decisions made in development phase and early in delivery phase. This will help protect against the potential impact of loss of key staff on end of project review.

**Method:** Desk review and interviews with the project team and key stakeholders (these can all be remote).

**Outputs:**

1. **Mid-term review:** Brief review of project progress to date and how effectively our activity relates to our key aim of maximizing impact, influence, and legacy, and the extent to which current decision making, project management and governance supports the project’s aspirations.
2. **Brief Outline evaluation plan** For internal audiences, comprising timeline and description of key steps, methods and responsibilities clearly linked to feasibility and prioritised, with the Consultant’s role explicitly defined; and how these steps fit within the existing delivery plan. This plan should identify how activities will be evaluated and how they link to project aims; and comment on methods proposed for evaluating longer term or ‘softer’ outcomes such as influence, attitudes and awareness, and the issue of establishing baseline.

End of Project review

**Evaluating impact**

This is the core evaluation task. The production of an impact focused evaluation report for NLHF, other project partners and funders.

We want a through project evaluation, with a primary focus on the long term impacts the project is seeking to achieve; that focuses on assessing the extent to which the project has met its overarching aims and objectives rather than counting the volume of specific outputs.

The evaluation will need to be alive to the context in which the project operates. Commons have a thousand-year history of contested space, exacerbated by the threats and tensions demonstrated by this particular moment of agricultural transition. We are not excepting a three-year project to have solved these problems.

However, within this context we want to understand, how the presence of the project and its manner of operating has impacted on the commons we are focusing on and beyond. While the exact questions to focus on will need to be determined by the evaluator and the project team with reference to the original application but areas of interest are likely to include:

**Project Specific Aims:**

**Collaboration:**

* Has the project increased collaboration on (or between), its focus commons and if so, what is the impact of this on the way the commons are managed?
* Has the project changed its partners and collaborators (commoners and partner organisations) attitudes and practices towards commoning? If so, how?
* Are participants more open towards the benefits common land can bring, beyond their own particular interest?

**Resilience**

* Has the project increased the resilience of commoning systems on the sites it has worked on?
* Has the project helped commoners secure agri-environment funding, or otherwise supported their farm business?

**Environmental/Public Benefits**

* Has the project’s collaborative and participative approach to delivering public benefits projects increased the likelihood of those projects securing stakeholder support -or delivering successful results?
* Has this or other project activity increased the likelihood of future delivery of public benefits on the commons it has worked with?
* Has the project increased commoners’ understanding of the public benefits their commons deliver and how they can contribute to and benefit from these?

**Public Awareness and Understanding**

* Has the project increased the publics awareness of the heritage of commons and commoning?
* Has it changed their attitudes towards it and if so, how? Has this led to changes in behaviour?

Note: although these questions are broadly focused on categories of project delivery, we are not suggesting that the questions are targeted by delivery strand – only asking collaboration questions about project’s badged as collaboration projects etc.

**NHLF aims:**

To what extent has the project met the aims NLHF has for all projects:

**Outcomes for heritage**

* Heritage will be better managed
* Heritage will be in better condition
* Heritage will be better interpreted and explained
* Heritage will be identified and recorded

**Outcomes for people**

* People will have developed skills
* People will have learned about heritage
* People will have changed their attitudes / behaviour
* People will have had an enjoyable experience
* People will have volunteered their time

**Outcome for Communities:**

* Negative environmental impacts will be reduced
* More people/wider range of people will have engaged
* The local area will be a better place to live, work or visit
* The local economy will be boosted
* The organisation will be more resilient

**Methods:**

The exact methodologies will need to be determined by the consultant in collaboration with the project team as part of the mid-term review. However, given the scale, scope, and geography of the project, coupled with the desire to answer some quite in-depth questions it is anticipated that there will need to be a dual approach.

Firstly, less in-depth methods aimed at providing a broader but necessarily more superficial general overview of the project as a whole. This might include desk reviews of end of project reports project media, results of participant surveys, etc

Second a deeper dive into the impact of some specific projects, workstreams or sites. Working with the project team to identify suitable foci for answering some of the more detailed questions using methods such as participant interviews. It is likely that this will need to include an element of visits to the locations where the project is being delivered.

**Output:**

A Project Evaluation Report to be shared with project partners, NHLF and other funders. This report should include data about project activity, descriptions of outcomes related to project aims, evaluation of impact and legacy, evaluation of project methods; a brief account of evaluation methodologies. It should aim to represent the ‘feel’ of the project. It is anticipated that this will be an electronic rather than a printed document, the evaluator should consider how to make the document as rich and engaging as possible e.g., through the use of pull quotes, photographs, and links to embedded video or audio. We will be able to provide photography and video captured during the project, but the evaluator may also wish to record participant interviews.

Supporting Sharing ways of working

A key aspiration of the project is through our delivery to influence those involved in managing commons beyond the project, by demonstrating and sharing our ways of working with partner organisations and others.

Building on the impact evaluation above, where you have found impactful and effective ways of working, we would like you to support the project team in capturing and communicating those in a manner aimed directly at influencing or supporting others to adopt those approaches

This will augment and fit into existing work we are carrying out to this end including:

* A series of webinars on commons management.
* A set of best practices notes and case studies.
* A national coms support contract including various internal and external project communications.

**Method/Outputs:** This will be determined in part by what comes out of the impact review – the intention is that this should not be too onerous for the evaluator, it will not involve any further research rather using and supporting in the project team to use the research carried out in the impact review to a slightly different end. This might include for example, providing content our comms support can use to augment a press release to the farming media on a particular project; writing up an element of the evaluation as a case study or best practice note, or supporting us to incorporate material from the evaluation into best practice notes; presenting at an end of project webinar.

Capturing Learnings

This is the internally focused section of the project’s evaluation. Our Upland Commons has broken new ground for the projects lead delivery partner the Foundation for Common Land (a very small but impactful organisation). FCL has predominantly worked in the areas of research, advocacy, policy, and awareness raising, it has and is running a number of ‘Test and Trial’ projects for DEFRA, but this is the first exclusively delivery focused project is has led. The project’s accountable body, the National Trust, has extensive delivery experience, but has more limited experience of the complex partnership arrangements necessitated by hosting project led by another organisation and is keen to see the capacity of its systems to support partnership working grow.

The purpose of this evaluation activity is to enable both organisations to benefit from lessons learnt over the course of this project to benefit their future delivery of similar projects. Areas to look at could include:

* Decision Making: How did the decisions made in development and delivery phases impact delivery?
* Project and Team Structure: How did the structure of project and of the project team impact delivery?
* Quality: How and to what extent did the project support the quality of delivery?
* Management, Support and Governance Structures: How well did the projects management and governance structures support the project?
* Systems: To what extend did the systems of the host accountable body support effective partnership working?

In each instance the primary focus is on useful learnings to support future delivery rather than a purely evaluative approach.

**Method:**  Interviews with the project team (staff and board) as part of the mid-term and end of project evaluation process -coupled with the understanding of impact form the rest of project evaluation

**Output:** A brief word document outlining lessons learnt, Audience: FCL, NT and Project Board

Timescales

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| --- | --- |
| **Activity** | **Time period** |
| Information gathering for mid-point review | Starting between appointment and Nov 22 |
| Mid-point review completed | Feb 23 |
| Information gathering for End of project review | (any point from mid-point review but largely)  Jan-May 24 |
| End of Project Review Completed  (Evaluating Impact & Capturing Learnings) | June 2024 |
| Supporting Sharing Ways of Working | Jan-August 2024 |

Contract Management

This contract will be managed by the Our Common Cause Project Manager, Sam Caraway, who is employed by the National Trust and seconded to the Foundation for Common Land. The contract will be with the National Trust, as the project’s accountable body, and will need to comply with the Trust’s General Terms & Conditions (available on request)

Selection Criteria

There are several areas that will specifically be considered in the selection process. These include but are not limited to:

* **Response to the tender:** the consultants understanding of the brief and their proposed approach to meeting the needs of the project and the requirements of the tender set out above.
* **Value for money:** Day rate, other costs and proposed time spent on the project.
* **Suitability for the Work**: Experience of evaluating similar projects  skills and qualifications of team, sector knowledge including ideally an understanding of upland /commons context We intend to invite suitable applicants to present their proposals to interview in WC 1st August TBC via zoom.

Health & Safety and Insurance

The contractor will be responsible for the health and safety of its employees

Before appointment, the contractor will need to demonstrate evidence of the following insurance policies:

* Employers’ liability £5 million (if the consultant employs staff)
* Public Liability £5 million
* Professional Indemnity Insurance £1 million

Tender Submission

Tender submission of no more than 14 sides of A4 should include: proposed approach to delivering the project evaluation; break-down of cost and time allocation; experience of similar projects; and a brief CV of staff allocated to this project.

Tenders should be submitted to [Sam@foundationforcommonland.org.uk](mailto:Sam@foundationforcommonland.org.uk) by no later than midnight on 26th of July

Award of contract

We will aim to award the contract by 8/8/22