



Evaluation Consultant Brief

For the 'Capacity building for a sustainable future'
project at the Victorian Society

Funded by National Lottery Heritage Fund

Introduction to the project

We are the only body in England and Wales with a statutory responsibility for buildings and structures from 1837-1914. We review and assess thousands of planning applications a year to protect numerous historic buildings and the associated crafts (metalwork, stained glass, woodwork, sculpture, painting etc.).

This project is to increase our resilience for the future, enabling us to fundraise internally without reliance on legacies and diversify income streams. This project will ultimately help raise awareness of our charitable objectives, to inspire public interest and appreciation of Victorian and Edwardian heritage by reaching a broader and more diverse audience.

This project has been generously supported with a grant from the National Lottery Heritage Fund.

The project aims to safeguard Victorian heritage in England and Wales by:

1. Increasing capacity for casework
2. Broaden our supporter and engagement audience, with a focus in levelling-up areas such as Northern and Welsh towns, younger people, and Welsh speakers

We aim to achieve these aims by:

- Increasing the reach of our memberships and fundraising. We have identified membership and Trusts & Foundations as primary areas of growth.
- Making the Society financially resilient for the future, without reliance on legacy income.

Key deliverables of the project:

- Hire a **new Memberships Manager** and **Fundraising Manager** to action fundraising objectives
- **Membership drive:** to recruit more younger members, females, people of colour, and in Wales.
 - Grow Individual Membership
 - Young Victorians to 300
 - Recruitment materials to be available in Welsh
 - Staff email signatures and office stationery to be bilingual in English and Welsh
- **Strategic review of governance:** stakeholder management, upskilling trustees and staff to aid retention and recruitment of members and fundraising:
 - Refresher training for trustees
 - Trustee audit
 - Review of current committees structure. Terms of reference and an annual programme of committee meetings will be developed
 - Evaluation of our regional groups and upskill where needed
 - Recruitment of a Young Victorian to each regional group
- **Fundraising and Recruitment strategy plan:** for fundraising targets so the two new employees can 'pay for themselves' after the two year period, with additional income to the Society to cover overheads and future project costs

- Reach restricted and unrestricted fundraising income of at least £250k (appeals, donations, membership uplifts, workshops)
- Produce an **impact report**: To be produced by a paid graphic designer, proving the Society's efficacy at saving heritage and promoting climate consciousness, tracking:
 - Membership growth (comparing recruitment figures)
 - Social media and website traffic
 - Total caseload and demand on our resources
 - Stakeholders engagement with analytic tools
 - Number of Trusts and Foundations engagement, size of our long term grants (Historic England and Cadw primarily), number of multi-year grants
 - Age, region and longevity of members, and membership types
 - Legacy pledges
- **Recruit more volunteers** to lead tours and talks, increase capacity for our education objectives for events, talks, lectures, publications, exhibitions
- **Website update**: following VocalEye benchmarks to review update after rebrand, improving accessibility
- **Share new educational materials**: share on our website using Creative Commons Attribution 4.0 International licence (CC-BY 4.0)
- **Workshops series**: deliver workshops to raise awareness of the importance of Victorian buildings, and the impact of planning decisions on historic environments. Target audiences include current and future planners, urban designers and architects
- **Development of the Fundraising Subcommittee**: with the Fundraising and Memberships Managers leading in strategic planning. To meet every two months.
- **Update reports**: which will be used with the final report to assess how we fulfilled our project
- **End of project Evaluation**: At the end of the two years period, a business plan will be produced for the retention of the two fundraisers' roles, and review of the fundraising strategies, and a SWOT analysis of how the project improved access and diversity of our work. This will also analyse challenges we faced and a follow up plan for after the project

Key audiences are:

National Lottery Heritage Fund, who is the sole funder of this project.

We could share this report with other funders to showcase how our fundraising work supports our core charitable objectives.

Activities of the project must support the NLHF's 2033 Strategy:

- Saving Heritage - conserving and valuing heritage, for now and the future
 - Improve condition and understanding of heritage
 - Reduce amount of 'heritage at risk'
 - Deliver transformational long term projects
 - Make digital heritage more accessible

This resilience project is carried out with the long term goal of increasing capacity for our casework and education objectives, to be funded by additional income brought in by the two fundraising staff. This project will ensure the Society's financial sustainability, and that our casework team remains operational, protecting precious heritage for the future.

- Of greater inclusion, diversity, access and participation in heritage
 - Increase diversity of heritage workforces and audiences
 - Reduce barriers for people under-served by heritage
 - Enable more people's heritage to be recognised
 - Champion digital technology to improve access

This project will help us drive for a more diverse and inclusive supporter base and make heritage more accessible for everyone.

- Organisational sustainability: Strengthening heritage to be adaptive and financially resilient, contributing to communities and economies
 - Increase organisations' commercial and governance capabilities
 - Develop skills and capacity across heritage
 - Embed resilience in projects NLHF funds
 - Enable the heritage sector to strengthen its contribution to economies and local communities

This is the main goal of the project.

The Society will have full time staff members with the knowledge and skills to develop a strategic business plan to generate income by securing new funding, increasing support levels of warm members, and run fundraising appeals. We have identified membership and trusts & foundations as primary areas of growth. This will increase the reach and capacity for the Society to carry out our core charitable activities of protecting Victorian heritage. This will also diversify our income sources, reducing our reliance on legacy income, so the Society can be more financially resilient to financial risks and economic volatility.

The two new fundraising staff will also free up time of the Director to focus on organisation-wide strategy, reviews, evaluation, implementation, as well as collaboration and communication with our colleagues in the sector and other stakeholders, ultimately benefitting the conservation of heritage.

- Protecting the environment: supporting nature recovery and environmental sustainability
 - Reduce the negative environmental impact of NLHF funding portfolio
 - Improve the ability of cultural heritage to plan for and adapt to a changing climate, help projects taking action for the environment

Environmental sustainability is one of the Society's core objectives.

Buildings are the UK's second highest carbon emitting sector, accounting for 23% of total emissions. Demolishing old buildings for new constructions causes an additional 75% of environmental impact compared to renovation of existing ones – the increased impact coming from the loss of captured carbon (such as in steel and glass) and production of new carbon from building new.

The role for the Evaluation Consultant

Our expectation is that the selected consultant will be responsible for analysing and writing up the impact of the project between April 2025 to April 2027. Experience of work assessing organisations with a focus on heritage would be an advantage.

Key deliverables are:

1. Support our strategic review including consultation, a governance review, full trustee training, upskilling staff
2. Support and advise us on devising engagement and fundraising activities, such as the workshop series and outreach
3. Lead on the design and delivery of the Evaluation Report, which covers an analysis on the overall impact of the project, a business plan for the retention of the two fundraiser roles, review of the fundraising strategies, analysis of how the project improved access and diversity of our work, lessons learned and a follow up plan for after the project

Contract management

The Evaluation Consultant will report to James Hughes, Director of the Victorian Society

The contract will start in June 2026 and complete by June 2027.

We anticipate the final Evaluation Report being completed in June 2027 as the final payment request and progress report are completed, though applicants should be mindful there is a possibility that it will overrun.

The fee for this commission is £14,400 inclusive of VAT and any expenses. This contract is funded through a grant from National Heritage Lottery Fund, no budget increase will be possible.

The fees will be paid as follows:

- 25% on exchange of contracts and start up meeting
- 25% on approval of the Evaluation Plan
- 50% on submission of final Evaluation report

Failure to complete the contract and submit the final report by the specified date will result in reduction in the final instalment.

Insurance

Professional Indemnity cover will be required at £1M, Public Liability at £5M and Employer's Liability at £10M (if applicable).

How to Apply

Please submit your tender, covering the points below, to the Victorian Society at admin@victoriansociety.org.uk by 5pm on Wednesday 10th June 2026.

1. Details of staff allocated to the project, the project manager / lead contact should be identified. A brief CV, or CVs of key personnel who would work on the project, which sets out your skills and experience relevant to this role. (Maximum 2 x A4 pages or 4 x A4 pages for a partnership/agency)
2. An outline of the internal responsibilities and liaisons, the allocation of days between members of the team, and the daily charging rate of individual staff involved
3. At least two examples of previous work demonstrating how you have successfully delivered a similar project (Maximum 4 x A4 pages)
4. Explain how you would approach the brief and the key activities, and milestones you envisage during the contract period, including working with members of the Society.
5. An overall cost for the work
6. Names, organisations and contact details of at least two referees who can provide confirmation of your experience and ability to deliver the brief. Please ensure referees are aware they may be contacted by us prior to the interview date.
7. Evidence of appropriate insurances. All consultants should have Public and Professional Liability and Companies Employer's Liability if they have employees.

Shortlisted candidates will be invited to an interview at the Victorian Society or online, on 15th or 18th June 2026.

These will comprise of a 20 minute presentation from the Candidate followed by a 20 minute question and answer session based on the Candidate's submission.

A final decision will be made following the interviews, and all shortlisted candidates will be informed by 22nd June 2026.

Award criteria

Candidates will be evaluated according to the following four criteria:

1. Relevant experience from two similar projects funded by the National Lottery Heritage Fund and completed within the last 3 years. The tender must show evidence of how their work reflected the latest Heritage Fund evaluation guidelines (25%)
2. Qualifications and experience of the proposed team (30%)
3. Approach to the consultancy including understanding of the demographic we seek to engage (25%)
4. Price or Value for Money (20%)

We will assess Candidates' responses according to these criteria and will award points up to the maximum shown against each heading in the Quality evaluation assessment table below. Failure to achieve a rating of satisfactory (i.e. a minimum unweighted score of 3 or above) in any one or more categories may result in the bid being disqualified at the Victorian Society's discretion.

Assessment Criteria	Score
Unacceptable: either no answer is provided, or the answer fails to demonstrate that any of the Victorian Society's key requirements in the area being measured will be delivered.	0
Poor: fails to demonstrate how the Victorian Society's basic requirements in the area being measured will be addressed, giving rise to serious concerns that acceptable outcomes would not be delivered against the project brief.	1
Weak: barely demonstrates how the Victorian Society's basic requirements in the area being measured will be addressed, giving rise to concerns whether acceptable outcomes would be delivered against the project brief.	2
Satisfactory: demonstrates how the Victorian Society's basic requirements in the area being measured will be addressed so as to deliver acceptable outcomes against the project brief.	3
Good: demonstrates how most of the Victorian Society's requirements in the area being measured will be addressed so as to deliver good outcomes against the project brief.	4
Excellent: demonstrates clearly how all of the Victorian Society's requirements in the area being measured will be fully addressed so as to deliver excellent outcomes against the project brief.	5

Please note the following:

The Candidate who submits the lowest overall price will receive the full score of 20% available for the financial evaluation. Remaining bids will be awarded a score proportionate to the lowest priced bid according to the following formula:

$$\text{Score} = (\text{lowest bid received} / \text{bid price}) \times 20$$

Abnormally low or high bids distort evaluation of tenders and where the Victorian Society feels that a bid falls into one of these categories the tender will be asked to explain or clarify their bid. This includes the discounting of daily rates.

Preparation of Tender

Candidates are responsible for obtaining all information necessary for the preparation of their response; and all costs, expenses and liabilities incurred in connection with the preparation and submission of the Tender and attending any interviews will be borne by the Candidate.

The Candidate is expected to have carried out all research, investigations and enquiries which can reasonably be carried out and to have satisfied itself as to the nature, extent, and character of the requirements of the Contract (in the context of and as it is described in the Specification), the extent of the materials and equipment which may be required and any other matter which may affect its Form of Tender.

Candidates may seek clarification on any of the points contained in the tender documents at any time **prior to seven working days** before the date for receipt of tenders. This will allow time for the Victorian Society to prepare a response to all Candidates by five days before the tender deadline and for all Candidates to incorporate the clarification prior to the tender deadline.

Non-consideration of Form of Tender

The Victorian Society reserve the right not to award the contract to the highest scoring, lowest priced or to any Candidate; and reserve also the right to accept any of the same in whole or in part. The Victorian Society may also refrain from considering any Form of Tender if it is not in accordance with the Form and Conditions of Tender, or the Candidate does not provide all of the information required or attempts to make variation or alterations to the Form of Tender, Conditions of Contract or the Specification.

Candidate's Warranties

In submitting a Tender, the Candidate warrants that:

1. It has not done any of the acts in the Non-Consideration of Form or Tender,
2. all information provided is true, complete and accurate in all respects including details of previous projects being presented as examples,
3. it has full power and authority to enter into the Contract.
4. it is of sound financial standing, and
5. its partners, directors and employees are not aware of any circumstances that may adversely affect such financial standing in the future.

Confidentiality

The Form of Tender, the Conditions of Contract, the Specification, and all other documentation or information issued by the Victorian Society relating to the Tender shall be treated by the **Candidate** as private and confidential for use only in connection with the Tender and any resulting contract and shall not be disclosed in whole or in part to any third party without the prior written consent of the Victorian Society.

The documents which constitute the project and all copies thereof are and shall remain the property of the Victorian Society (whether or not the Victorian Society shall have charged a fee for the supply of such documents) and must not be copied or reproduced in whole or in part and must be returned to the Victorian Society upon their request.

All information provided by Candidates as part of a tender return will be treated as confidential.

Freedom of Information

Information in relation to this tender may be made available on demand in accordance with the requirements of the Freedom of Information Act 2000.

Candidates should state if any information supplied by them is confidential or commercially sensitive or should not be disclosed in response to a request for information under the Act and should state why they consider the information to be confidential or commercially sensitive.

This will not guarantee that the information will not be disclosed but will be examined in the list of the exemptions provided in the Act.

APPENDIX A: Form of Tender

Please complete this form and include it with your responses to the questions above.

Project Name: 'Capacity building for a sustainable future' project at the Victorian Society

Professional Service: Evaluation Consultant

Name of Candidate:

I/We, the undersigned, do hereby offer to execute and complete the above mentioned professional services in strict accordance with the Schedule of Services for the following lump sum fee:

£ ___ plus VAT

Confirm figure in words: _____ plus VAT

1. Resources

Please state the number of days you have allocated to the project and day rates in the table below.

Team	Day Rate (£)
Director/ Partner	
Senior Consultant	
Consultant	
Other – specify _____	

The above day rates will be utilised to negotiate any additional works that may be required if deemed to be beyond the reasonable scope of the works specified. A

All day rates are to be based on a 7.5 hour day and are to include allowance for expenses and disbursements (including printing).

2. Offer Period

This tender/ offer is to remain open for a period of 90 days from the date fixed to the return of tenders.

Dated this _____ day of _____ 20__

	Candidate to provide responses. Some are pass/ fail
Name of firm or company	
Postal address	
Registered address (if applicable)	
Company number (if applicable)	
Please indicate if you are: a sole trader, partnership, Public or Private Limited Company or other type of organisation	
Main contact	
Contact telephone number	
Contact email address	
Please indicate your level of Employer's Liability Insurance, the policy number and expiry date ¹	
Please indicate your level of Public Indemnity Insurance, the policy number and expiry date	
Please indicate your level of Professional Indemnity Insurance, the policy number and expiry date	
Signature of authorised person	
Name of authorised person	
Capacity in which signed	

¹ If you do not have any of these insurances please indicate if you will purchase them if awarded the contract. If they are not applicable e.g. you are not an employer please indicate this.