

## Consultancy Brief for Evaluation of the Project

### Background

Bailiffgate Museum & Gallery is a volunteer-run visitor attraction which is open 6 days a week for 50 weeks a year.

Our museum exists to preserve, record and make accessible the history of Alnwick town and district and to showcase the work of local and national artists within a vibrant, stimulating and aesthetically pleasing environment for the benefit of the community.

As a community museum and one of the largest arts spaces in north Northumberland, we bring cultural opportunities to the most rural county in England. In recent years, this has seen us bring high profile exhibits to rural north Northumberland as well as working in rural and isolated communities where only a few hundred people (or less) may live to celebrate and showcase their unique heritage, traditions and culture.

Each year we welcome 10,000 visitors. Our permanent collection which is displayed across two floors of the museum offers a journey through 10,000 years of history in Alnwick and district. Upstairs in the gallery, we showcase local heritage, traditions and artworks alongside national activity through an ambitious seasonal exhibitions programme. Recently, this has included Illustrating Harry Potter (on loan from Seven Stories, National Centre for Children's Books), paintings from acclaimed artist Stella Vine, and 100 years of Fashion in collaboration with super model, Stella Tennant and featuring designer's gowns and accessories including Prada, Dior and Stella McCartney from her personal collection and a collaboration with Jorvik Museums to bring 'The Vikings' to Northumberland.

We are proud to offer opportunities which enable local people to access cultural experiences and activities not normally available in rural settings. Workshops, talks and targeted activities help to bring local people closer to their heritage and culture. School activities and outreach projects take our collections into communities and help them to discover more about their local heritage and to present it to others through, stories, artefacts and their own voice. Our ambitious programme also ensures we build on our success in attracting visitors from across the world. We support green energy and want to make a sustained contribution to becoming carbon neutral.

Bailiffgate Museum & Gallery is a registered charity and an accredited Museum. We employ one part-time Administrator, and a cleaner. Other consultancy posts include Transition and Programme Manager for the Northumberland Hall project and a

Project Manager for our 'This is Alnwick' project together with an administrator. All other tasks that keep our museum open every day are provided by volunteers with targeted support from external consultants. Main areas of work include Front of House, collections curation, exhibitions, organising events, recruiting volunteers, education, retail, contract management, finance and fundraising, marketing and social media, IT, AV and website development.

We are a membership organisation governed by a board of up to 12 trustees with 11 member representatives (Friends of Bailiffgate Museum) and one trustee nominated by the Alnwick Town Council. Currently we have eleven trustees with one vacancy. The board meets 6 times per year. Each of our trustees has delegated responsibility for an area of our work, to provide a point of contact on the board and facilitate effective links between the board and volunteer teams.

Day to day operations is co-ordinated by our Operational Management Group (OMG) which usually meets monthly. This is chaired by a volunteer and attended by volunteer representatives from different areas of museum operations (education, collections, exhibitions, marketing, retail, website, volunteers etc).

The Museum is recognised for its high standards and professionalism and is well supported by Alnwick Town Council, Northumberland County Council, and Tyne and Wear Archives and Museums.

### **Our commitment to our Volunteers**

Much of Bailiffgate Museum & Gallery's success comes from the strong commitment of our 50+volunteers who bring a wealth of expertise, dedication, loyalty and pride to our organisation. We recognise that volunteering is a two-way process which we try to ensure benefits the volunteers as well as the Museum.

The organisation is committed to using fair, efficient and consistent recruitment procedures for all potential volunteers. We aim to include opportunities for all volunteers who reflect the diversity of the local community and as an organisation we aim to identify appropriate roles to make the most of what volunteers offer, in line with our Strategic aims and objectives. Our Volunteer Strategy is that "Everyone is welcome".

### **NLHF Project – Northumberland Hall**

Bailiffgate Museum & Gallery has been successful in being awarded £189,988 by the NLHF as the Development phase of a major project as part of the Alnwick Place regeneration plan. The project will transform Northumberland Hall, a Grade 1 listed building in the heart of Alnwick into a creative, cultural hub where collections and exhibitions bring to life the past, present and imaginative narratives that celebrate our place and its people.

If the development phase is successful then we will submit our second-round application for the full delivery round which includes reinterpreting our collection and developing an innovative, creative heritage experience for visitors and local people in the heart of Alnwick.

We want to make the most of this unique opportunity to contribute to the economic, cultural and social development of Alnwick and surrounding areas to create an innovative, community led museum for those who live and work in Alnwick and an outstanding experience for visitors.

### **Vision**

Our ambition is to become a dynamic and inclusive cultural and creative hub in the heart of Alnwick, which builds local skills, pride and confidence and is a catalyst for the regeneration of the town. The experience will share the past, present and imaginative narratives of NE66 and celebrate our place and its people, co-curated by our communities and delivered with our partners.

Relocating to Northumberland Hall, set in the heart of Alnwick's historic marketplace, is an opportunity for our volunteer-run local history museum to reimagine itself as a creative cultural community-led hub for Alnwick and district. The central location and greater space offered by the Hall will provide new programming opportunities to work more effectively with our volunteers, community groups, schools and local businesses, and reach out to new and different audiences, to celebrate local stories and showcase our creativity. We will create a thriving new inclusive, engaging and family-friendly destination with a more sustainable future, by building capacity and new revenue streams that will enable us to develop our team's skills, resources and partnerships as well as generate income.

We will be a new, vibrant and very visible presence in the marketplace, and a catalyst for the regeneration of the town. To achieve this, we want to change what we are, who we work with and how we present narratives of Alnwick and district. We will build new relationships and help grow a strong sense of local pride and ownership through the stories we tell, the collections we showcase and the engaging activities we offer collectively and collaboratively. In particular, we will work with local schools, youth groups and young adults through partnerships, so children and young people can help us shape and deliver our offer effectively. We will also focus on developing our offer to enhance accessibility and diversity by meeting the needs of key groups with special needs, including local home-education families and SEND groups.

### **Summary of work to be undertaken**

Bailiffgate Museum & Gallery has been selected to submit a bid for the Development phase of a major project as part of the Alnwick Place regeneration plan. The project will transform Northumberland Hall, A Grade 1 listed building in the heart of Alnwick into a creative, cultural hub where collections and exhibitions bring to life the past, present and imaginative narratives that celebrate our place and its people.

Evaluation is a key part to success and will enable Bailiffgate to chart what worked well and where there are lessons to be learned. This brief is to provide a robust and clear evaluation which will provide Bailiffgate with a valuable insight into the project it is undertaking and will also be used to provide grant funders with a detailed record of the way in which their funding was used to complete the main aims and aspirations of the project.

**Phase One:** Prepare a baseline for Bailiffgate Museum & Gallery (Bailiffgate) for Trustees and funders against which progress will be measured and evaluated. The evaluation should include our strategic ambition which will be delivered through the capital project.

**Phase Two:** Assess, evaluate and produce a progress report for Trustees and Funders against the baseline and expected outcomes during the delivery stage.

**Phase Three:** Assess, evaluate and produce a final report for Trustees and Funders against the baseline and expected outcomes during the first three years of business. The final report should be clear about economic impacts and any accepted measure to show we are meeting the aims of History, Creativity and Community. The report should provide key information for future funding bids.

Value of contract expected to be £5k & VAT for Phase One and a further £15k for Phases Two and Three, should the funding bid be successful. There will be break points after Phases One and Two.

### **Methodology**

Please set out the methodology, including methods, you plan to use to meet the aims and objectives of this commission. We expect the methodology to include:

- Industry standard baseline at the outset of the project for Bailiffgate to include measurable data relating to footfall, finance and information relating to its development aims and objectives. Baseline including the evidence for regeneration in Alnwick
- Any summaries of community, visitor and stakeholder evaluations provided through Community Engagement

Should we progress to Phase Two and Three:

- Industry standard measurements of progress against baseline, stated aims and outcomes for Bailiffgate and Alnwick during the delivery stage
- Any summaries of community, visitor and stakeholder evaluations provided through Community Engagement Consultancy
- Industry standard measurement of progress against baseline during first three years of trading in Northumberland Hall
- Any summaries of community, visitor and stakeholder evaluations provided through Community Engagement Consultancy and other sources commissioned by Bailiffgate.
- The final report should also reference any available external evaluations that relate to Alnwick Town Centre regeneration.

## **Outputs**

To follow guidance by the NLHF and any good practice on evaluation as directed by them.

We require a clear, evaluative report at the end of each phase. That for Phase One should include an executive summary; main findings; analysis and interpretation of relevant data, as agreed with Bailiffgate, and how it will be used as part of the subsequent evaluation phases to establish progress against stated outcomes, aims and objectives of the project which should include the delivery of the capital project and the strategic ambition.

That for Phase Two should include an executive summary; main findings; analysis and interpretation of the same data sets updated to reflect the position at the point of delivery and to ensure clearly identifiable lines to measure progress. Clearly readable text, charts and tables should give a full picture of the impact of the delivery stage of the project against the baseline and projected outcomes for Trustees and Funders.

The summary and main findings should be a 'standalone' document for press, stakeholders and supporters.

In July of each year, following on from the end of year financial reporting and in good time for the September AGM, Trustees require a brief interim report of progress against baseline targets.

The final report should be cumulative over the first three years of business. There will be a brief, (4 sides of A4) interim summary report at the end of the financial year in year one and two followed by full report in year three.

The final report will include an executive summary; main findings; analysis and interpretation of the same data sets updated to reflect the position during the first three years after project delivery. It should give a clear, easily understandable report against stated aims and outcomes, including those in the business plan for this period. It should be possible to see the impact of Bailiffgate moving into Northumberland Hall and the impact on the regeneration of Alnwick Town Centre. The summary and main findings should be a 'standalone' document for press, stakeholders and supporters.

The reports:

- A4 word documents available electronically and on pen drive
- Main text Arial point 12
- Data in excel for easy access
- Draft copies should be provided two weeks before the deadline dates for comments from Trustees
- Final copies should be sent as PDF and should reflect any additional specifications set by Grant Funders
- A slide presentation should be provided setting out the main findings; conclusions and any recommendations that may be relevant to subsequent phases

The timescales for each phase of the project are important to enable Trustees to meet the expected timetable and standards set by stakeholders and grant funders.

Payment will be within 10 days of successful delivery of all required outputs. The Trustees reserve the right to redact any commercially sensitive data, at final draft stage should the full report from Phases Two and Three be made public.

### **Indicative Timetable, subject to funding**

Phase One work commences: 08/08/2024  
Phase One completed: 18/10/2024

Break point

Phases Two completed: 18/07/25  
Interim report: 17/07/26  
Cumulative Interim report: 16/07/27  
Phase Three completed: 21/07/28

### **Award Criteria**

Your proposal for undertaking the work should include:

1. Detailed methodology for undertaking the evaluation
2. Outline of the internal responsibilities, resources required
3. Details of any interviews, data required from Bailiffgate
4. Experience and expertise of staff allocated to the evaluation
5. Two references for similar work undertaken within the last five years
6. Backup arrangements if any of the allocated staff become unavailable to complete the work
7. The project manager and lead contact (if different)
8. The allocation of days between members of the team
9. The daily charging rate of individual staff involved
10. A timescale for carrying out the evaluation with key milestones
11. Overall cost for each phase of the work

All proposals submitted will be evaluated by Bailiffgate against the following criteria:

1. To what extent does the proposal demonstrate an understanding of the issues (including social values) related to this brief?
2. To what extent are the methodology and methods appropriate to the requirements set out in this brief?
3. What degree of experience does the bidder demonstrate in order to successfully complete the work?
4. How well has the bidder structured a team in order to successfully manage the contract and deliver the required work to the budget and timetable required?

Please provide a table showing:

- costs including expenses; including and excluding VAT
- days allocated and day rate per employee including and excluding VAT
- any additional resource requirements

Trustees have set a budget for this work and will be relying on grants and volunteer contributions to complete this project. As a Registered Charity we are keen to use public money wisely and will not be in a position to make any awards outside this financial envelope, even though it spans a five-year period.

Phase One:	10 days @ £500 & VAT
Phase Two:	20 days @ £500 & VAT
Phase Three:	10 days @ £500 & VAT
Total budget:	£20,000 & VAT

### **Management of the contract**

The contract will be awarded by 8 August 2024, subject to grant funder's award process. Phase One should be submitted to Bailiffgate by 18 October 2024  
The anticipated budget is £5000 to include expenses, but excluding VAT  
The contract will be let by Bailiffgate Museum & Gallery.

If Phase Two is approved work will commence on 15 April 2025 and the report will be submitted to Bailiffgate by 18 July 2025.

The anticipated budget is £10,000 to include expenses, but excluding VAT  
The contract will be let by Bailiffgate Museum & Gallery.

Subject to approval and funding Phase Three will commence on 18 July 2025; the first interim report will be submitted by 17 July 2026; the second by 16 July 2027 and the final report will be submitted to Bailiffgate by 21 July 2028.

A payment of £1000 will be paid on receipt of each interim report and a final payment of £8000 including expense, but excluding VAT

The anticipated total budget for this consultancy is £20,000 to include expenses, but excluding VAT  
The contract will be let by Bailiffgate Museum & Gallery.

**Please submit invoices to The Treasurer, Bailiffgate Museum & Gallery.  
All other communication should be with the Chair and Company Secretary of Bailiffgate Museum & Gallery/ Transition & Programme Manager.**

### **Procurement process**

Proposal return deadline: 5pm on 1 August 2024.

Bailiffgate Museum & Gallery will notify bidders by telephone of our procurement decision by 8 August 2024 and this will be followed by email confirmation.

Please submit proposals, marked CONFIDENTIAL Proposal for Evaluation to Bailiffgate Museum & Gallery for the attention of Chair of Trustees.

Email to: [companysecretary@bailiffgatemuseum.co.uk](mailto:companysecretary@bailiffgatemuseum.co.uk)

Or post to:

Chair of Trustees

Bailiffgate Museum & Gallery

14 Bailiffgate, Alnwick NE66 1LX

Marked CONFIDENTIAL Proposal for Evaluation

The proposal should arrive no later than 5pm on 1 August 2024.