

Invitation to Tender

EVALUATION CONSULTANT

for

**Braemar Castle,
Raising the Standard Project**

Braemar, Aberdeenshire.

(July 2021)

1.0 Client's Name

Braemar Community Ltd
Braemar Castle, Old Military Road, A93, Braemar, Scotland AB35
5XR Tel: 01339 741219

Braemar Community Ltd is a Scottish Charity, No. SCO38573, regulated by the Scottish Charity Regulator (OSCR) and a Company limited by guarantee, No. SC276254, registered in Scotland.

2.0 Principal Contact

Nadine Stuart, RTS Project Manager, Email:
nadinejstuart@gmail.com
Direct dial: 07827595034

3.0 Background

Braemar Castle is a Category A Listed L-shaped compact tower house, situated on the outskirts of Braemar overlooking the spectacular Invercauld Estate and wider Cairngorms National Park. For the past thirteen years Braemar Castle has been run as a visitor attraction by Braemar Community Limited (BCL), a company limited by guarantee and a registered Scottish charity set up in 2004 to develop, manage and incubate sustainable projects on behalf of the community of Braemar.

Over this time, BCL has successfully- established Braemar Castle as a popular and much-loved visitor attraction generating a dramatic increase in visit volume as a result of the improvement works it has delivered and the visitor experience it has developed. As a volunteer-run organisation, the support and involvement of the local community has been a critical factor in the Castle's success, and in turn has cemented the Castle as a pillar of the local community. Against this backdrop of success, the Castle looks towards an uncertain future. Investment is required in order to deliver urgent repair and conservation works to the building and collections and also to provide much needed visitor experience enhancements which together will safeguard the long-term sustainability of the Castle as a visitor attraction and community asset.

Raising the Standard Project

Raising the Standard (RtS) represents a major step-change for Braemar Castle, providing the facilities, resource, and expertise to not only protect the Castle's important tangible and intangible heritage and support its sustainability, but also to provide a platform from which future growth can occur. The project is the critical first phase of a wider Masterplan for the site. BCL has been working with the Princes Foundation to develop this Masterplan, building from RtS and ensuring a coordinated holistic approach. Without RtS to address the risk to the building, collections and visitor experience, future phases will not be possible.



Raising the Standard is a critical step in achieving our vision. Our project is transformational in terms of the future it offers Braemar Castle to progress to become a leading visitor attraction, benefitting both Braemar as a village and a destination, and developing the rural economy of the area.

The project outcomes and evaluation requirements approved by the funders are listed in Appendix A. An outline Logic Model for the project was prepared as part of our round 2 submission and is included in Appendix B. The Raising the Standard project board (RtS Project Board) has begun to collect some evaluation data for the project; this will be made available to the consultant once appointed.

4.0 Aim

The RtS project board are looking for an independent evaluator to undertake qualitative and quantitative research, with the support of the RtS project board, to evaluate the impact and success of the programs throughout its delivery – to identify the difference that the project makes to our community, our volunteers and to the visitor experience. There is a need to identify learning points during delivery and lessons learned to inform future project programs managed by Braemar Community Ltd and to identify possible actions for Braemar castle team to maintain the legacy of the project.

The main output will be a written report that will be circulated to stakeholders and submitted to funders as part of the end of project reporting and claims process.

Key questions to consider:

- Whether the project has achieved its objectives and outcomes, including those agreed with funders as set out in Appendix A.
- The difference the project has made to the heritage and the public perception of Braemar Castle.
- The difference the project has made for people who actively participated in the project, in particular community organisation and volunteers, apprentices and contractors, property owners and school children.
- The difference the project has made to the awareness and understanding of the maintenance requirements of Braemar Castle's historic buildings and landscape.
- The positive and negative impacts of the program on existing economic activity
- The effectiveness of the project delivery, including project management and financial management.
- Strengths and weaknesses of the project and recommendations to inform future historic works to Braemar Castle.
- Recommendations for actions to maintain the legacy of the project.

5.0 Scope of Commission

- A) To design an evaluation plan for the project at an early stage, working with the Project manager:
- Review the current logic model and develop further as required. Decide what data needs to be captured to answer the key questions and to meet the requirements to report against outcomes and complete evaluation reports for funders. This should be in line with relevant guidance from

the Heritage Fund <https://www.heritagefund.org.uk/publications/evaluation-guidance> and https://www.heritagefund.org.uk/sites/default/files/media/attachments/application_guidance and Historic Environment Scotland.

- Complete a gap analysis of existing data to inform this and agree benchmark data.
- Produce a plan to capture the total data requirement. This should detail:
 - What data is to be captured
 - Who is to capture it
 - Methods to capture the data – with a particular focus on how the project team and delivery partners will gather evaluation feedback from project participants
 - Design/provide data capture tool(s) for use by the project team and delivery partners
 - Record keeping
 - Data analysis methodology and who should be responsible for this

B) At key stages throughout the project, working with the Project Manager:

- Confirm that data is being collected as intended.
- Analyse data (or audit data where analysed by others) to review lessons learned mid-project, to feed into continuing delivery.
- Gather views of a representative sample of stakeholders such as: Braemar Community, Braemar Castle volunteers, local community groups, local businesses, activity participants, building repair grant recipients, contractors and apprentices, etc. (The consultant will be expected to design questionnaires or conduct interviews with key stakeholders, to supplement data collected by the project team and delivery partners).
- Regular communication (via progress reports, face to face meetings or phone calls) will be required with the Primary Contact throughout the evaluation process.
- Produce a short interim evaluation report at key stages throughout the project, for review by the RtS Project Board.

The key stages will be agreed with the RtS Project Board in advance and are expected to include 6 monthly and annual reviews as a minimum and on completion of major capital projects (e.g. the reharling of the external walls, internal works, external landscape works) and delivery of activity plan projects.

C) In the final year of the project, working with the Project Manager:

- Audit all data captured during the project.
- Prepare a report detailing the findings and recommendations, suitable for sharing with a range of stakeholders including funders and NHLF, HES and Trusts and Foundation grantees, covering all information required by project funders. This should include a visually attractive executive summary with infographics to accompany the main messages.
- Deliver a short presentation outlining the findings of the evaluation, for example at an end of project celebration event or as CPD training for Braemar Castle Team and RtS Project Board Members and a presentation to the Braemar Community Limited Members.

Innovative suggestions for alternative evaluation approaches are welcome.

6.0 Timetable

Anticipated start date: 4 weeks from the date submissions are received.

The anticipated completion date for the Braemar Castle Raising the Standard Project is end September 2023 then the legacy project commences.

Fee proposals should include a suggested outline plan and program for the works, showing when the key deliverables will be completed and the key stages when the consultant will work with the Project Manager as outlined in 5.0 above.

7.0 Consultant Specification

- Experience of undertaking end of project evaluation or impact assessments, preferably for similar heritage, training & community engagement, or area regeneration programs. This should include preparing evaluation plans and logic models, and knowledge of data sources, collection, and analysis.
- Experience of advising and supporting project staff to effectively manage and carry out data collection and self-evaluation where appropriate.
- Experience of working with local authorities, funding bodies or third sector organisation.
- Experience of engaging with local people and community representatives.
- Good communication skills including the ability to engage with a wide range of stakeholders and the ability to write in succinct plain English.

8.0 Fee Proposals

Details of submissions should be treated as private and confidential. The form of the submission should be as follows:

- Firm's name, address and contact details
- Name of Director/Partner in charge and contact details
- Details of approach to the project (methodology)
- An outline project plan and programme, including recommendations for key stages as set out in 5.0 and 6.0
- A budget breakdown – to be provided in a separate, clearly marked email or attachment
- CVs of key personnel including details of the experience of the individual(s) who will directly undertake the work, and examples of relevant previously completed projects for which he or she was responsible
- Examples of previous relevant work including an evaluation report and an evaluation plan
- Any other project specific information in support of the firm's submission.

A lump sum fee is envisaged. Any additional work/costs excluded from the fee should be clearly noted.

The successful tenderer will be required to submit a copy of their current Public Liability/Professional Indemnity documents.

9.0 Assessment of Submissions

The budget for this evaluation is **£15,000 (net of VAT)**.

The submission is to be sent electronically to Nadine Stuart, RtS Project Manager – nadinejstuart@gmail.com by Monday 30th August 2021 by 1700 hours.

- Braemar Community Ltd are not bound to accept the lowest or any offer of Tender.
- Tender submissions will be assessed on an 80% Quality/ 20% Price weighting.

Quality Assessment Criteria (80%):

- Relevant experience of delivering similar projects, and the skills and suitability of the firm/project team (30%).
- Evidence of an understanding of the project requirements and needs (10%).
- Methodology, including, but not limited to, method of working, data review and collection, and stakeholder engagement (30%).
- The outline project plan and program (10%).

The quality related criteria shall be assessed based on the tender and supporting evidence submitted by the Tenderer.

Tenderers may be invited to interview in September 2021.

10.0 Copyright and GDPR

All rights including copyright to reports, images, specifications and interpretation whether in writing or electric form must be assigned to Braemar Community Ltd (BCL). Intellectual copyright will remain with the original author. All digital outputs (for example, images, videos, audio files, documents and webpages) will be shared under the Creative Commons open license CC-BY 4.0.

BCL and the Contractor are independent Data Controllers and therefore must ensure that any Personal Data collected or processed as part of this commission complies with the General Data Protection Regulation/the Data Protection Act 2018 (“Data Protection Legislation”).

In the event that the Contractor is a Data Processor of the Personal Data processed as part of this commission then they will be deemed to be a Data Processor for BCL and the Data Processing Schedule in Appendix C shall be completed and deemed to be applicable.

“Personal Data”, “Data Controller”, “Data Processor”, “processing”, “Data Subject”, and “Supervisory Authority” shall have the meanings ascribed to them by the Data Protection Legislation as in force (and related terms such as “process” shall have corresponding meanings).

11.0 Presentation of Reports and Documents

Copies of all reports are to be submitted to the Project Manager electronically via email or similar.

All reports, publicity, materials and outputs must acknowledge the support of Historic Environment Scotland, the National Lottery Heritage Fund, BCL and include the relevant logos in line with their requirements.

12.0 Liaison

The consultant appointed will be required to liaise with and report to the principal contact (PM), whilst working day-to-day with the Castle Project Team. The consultant will engage with project stakeholders, project delivery partners, community groups, contractors, property owners, schools etc. as required.

13.0 Further Information

Project information is held at centrally by the project manager and 1 board member.

BCL gratefully acknowledges the support of Historic Environment Scotland and the National Lottery Heritage Fund, who are the main funders of this project.

How we use your information: BCL and the Raising the Standard project team will use your information to manage the Raising the Standard Project communications and may share your information with our delivery partners and the grant funders, Historic Environment Scotland and The National Lottery Heritage Fund, for administration purposes.

Appendix A: Funder Evaluation and Project Outcomes

Aims and Outcomes approved by The National Lottery Heritage Fund:

RtS Project Aims	NLHF Outcomes
Aim 1: To protect and preserve the A ListedBraemar Castle	H1 - Heritage will be better managed H2 - Heritage will be in better condition
Aim 2: To care for and preserve the collection and Braemar Castle and achieve an appropriate balance between long-term care with continuing to improve access to the collections under its care, in proportion to the resources available.	H1 - Heritage will be better managed H2 - Heritage will be in better condition H3 - Heritage will be better interpreted and explained H4 - Heritage will be identified/ recorded
Aim 3: To grow visitor numbers and visitorsatisfaction to a sustainable level for the long-term viability of the Castle as a visitorattraction	H3 - Heritage will be better interpreted and explained C2 - More people and a wider range of people will have engaged with heritage C3 - Your local area/community will be abetter place to live, work or visit C4 - Your local economy will be boosted C5 - Your organisation will be more resilient P2 - People will have learnt about heritage P4 - People will have an enjoyable experience

<p>Aim 4: To enhance capacity and organisational resilience such that the management of the Castle is secure over the long-term</p>	<p>C2 - More people and a wider range of people will have engaged with heritage C4 - Your local economy will be boosted C5 - Your organisation will be more resilient P1 - People will have developed skills P2 - People will have learnt about heritage P3 - People will have changed their attitudes and/or behaviour P5 - People will have volunteered time</p>
<p>Aim 5: To improve quality of life and wellbeing for the local community, volunteers and wider audiences, to encourage and establish strong and lasting connections with the Castle and its heritage through learning.</p>	<p>P1 - People will have developed skills P2 - People will have learnt about heritage P3 - People will have changed their attitudes and/or behaviour P4 - People will have an enjoyable experience P5 - People will have volunteered time C2 - More people and a wider range of people will have engaged with heritage C5 - Your organisation will be more resilient</p>
<p>Aim 6: To draw new and more diverse visitor and volunteer audiences to Braemar and develop resilience in our rural economy.</p>	<p>P1 - People will have developed skills P2 - People will have learnt about heritage P3 - People will have changed their attitudes and/or behaviour P4 - People will have an enjoyable experience P5 - People will have volunteered time C2 - More people and a wider range of people will have engaged with heritage C3 - Your local area/community will be a better place to live, work or visit</p>

Further evaluation requirements for the NLHF are set out in their Evaluation Guidance -

<https://www.heritagefund.org.uk/publications/evaluation-guidance>; Heritage program guidance

(Appendix 1,)

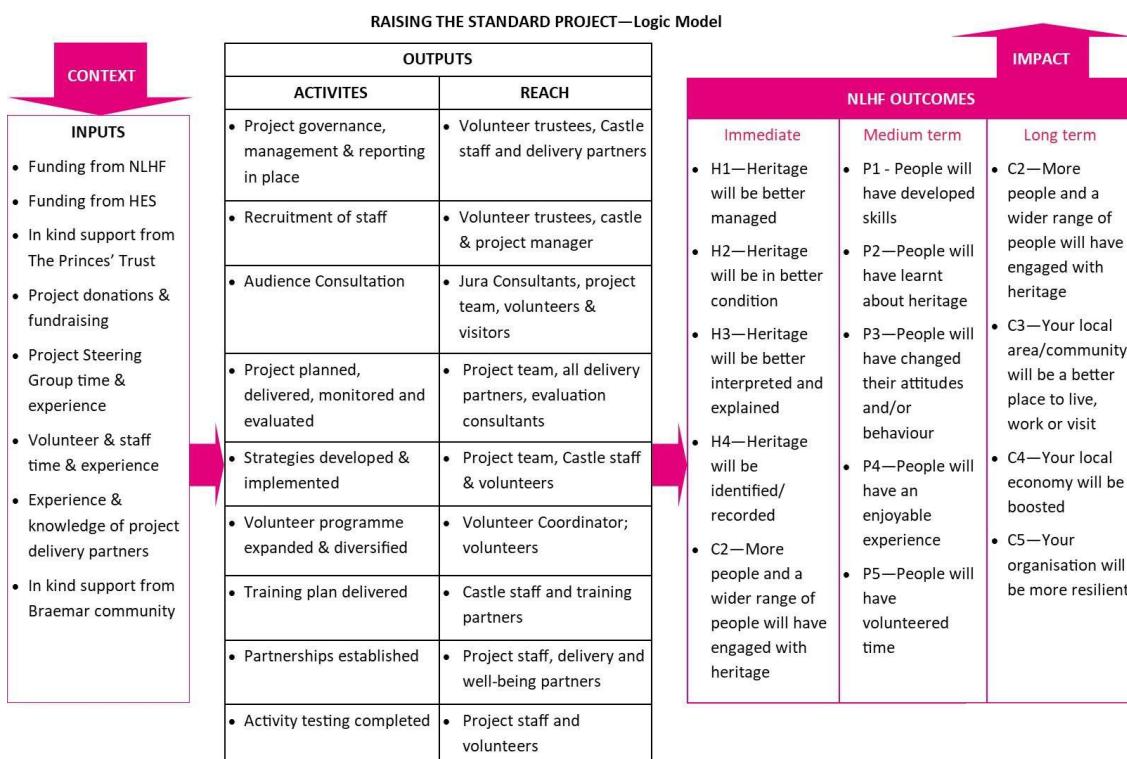
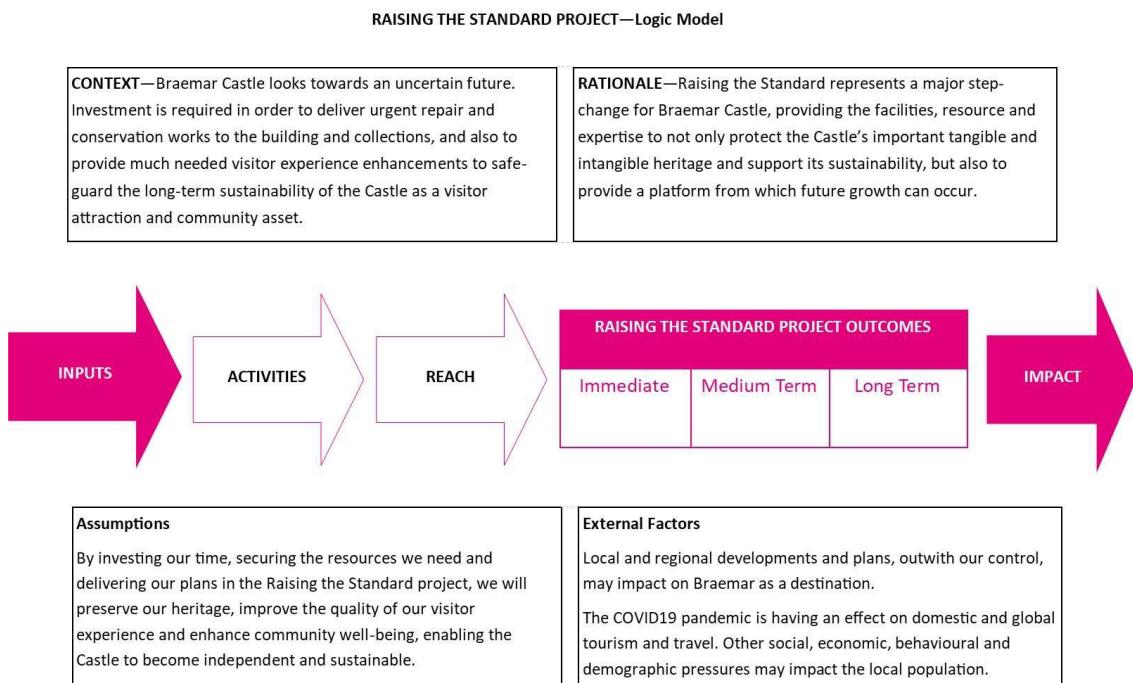
[\(https://www.heritagefund.org.uk/sites/default/files/media/attachments/th_application_guidance.pdf\)](https://www.heritagefund.org.uk/sites/default/files/media/attachments/th_application_guidance.pdf)

Historic Environment Scotland outcomes (to be selected from the list below; HES advise to focus on the most relevant outcomes and actions, rather than trying to achieve them all):

- 1. HERITAGE AND SOCIETY: The historic environment makes a real difference to people's lives**
 - Create heritage without boundaries
 - Use historic environment to build strong and sustainable communities
 - Promote knowledge about the historic environment
 - Use historic places to help us live healthy and active lives
- 2. HERITAGE AND THE ENVIRONMENT: The historic environment is looked after, protected and managed for generations to come**
 - Look after the historic environment assets in your care
 - Encourage everyone to work together and drive support and innovation in caring for the historic environment
 - Respond to the challenges of climate change
 - Enable sustainable change in the historic environment
- 3. HERITAGE AND THE ECONOMY: The historic environment makes a broader contribution to the economy of Scotland and its people**
 - Promote sustainable tourism
 - Encourage enterprise and investment in the historic environment
 - Advance the use of science and technology
 - Increase the quality, availability and demand for skills
- 4. HERITAGE AND CREATIVITY: The historic environment inspires a creative and vibrant Scotland**
 - Celebrate the cultural value of heritage
 - Promote the historic environment as a key resource for creative inspiration
 - Use the historic environment to enrich education and learning
 - Share our heritage with the world

Appendix B: Logic Model Raising the Standard

The logic model set out in the following diagrams shows how we intend that our Raising the Standard project will achieve our outcomes.



ACTIVITES	RAISING THE STANDARD PROJECT—LOGIC MODEL PROJECT OUTCOMES		
	IMPACT	IMPROVEMENT	RISKS
<ul style="list-style-type: none"> Project governance, management & reporting in place Recruitment of staff Audience Consultation Project planned, delivered, monitored and evaluated Strategies developed & implemented Volunteer programme expanded & diversified Training plan delivered Partnerships established Activity testing completed 	<p>Immediate</p> <ul style="list-style-type: none"> Our project is delivered on time and to budget, and the castle is reopened. Reopening celebrations and events will generate renewed interest and excitement about the Castle. The castle, its gardens and grounds will be in better condition giving the community a sense of achievement. Our volunteer community will learn from and enjoy our closure activities. We will increase our understanding of the Castle's social and architectural history. Our upgraded facilities will offer an improved environment for sharing the Castle's heritage stories and a more accessible visitor experience. New displays in the Castle will protect and enhance our collections. Professional museum standards for access and display will be met. <p>Medium term</p> <ul style="list-style-type: none"> Volunteer and staff training will deliver a high quality and accessible visitor experience. Professional specialist training and activities will enable a deeper level of skill development within our volunteer and staff team. Volunteers increase their appreciation of Braemar Castle's heritage and will be able to share their knowledge in the Castle and through outreach. There will be more opportunities for new audiences, including those from rurally isolated areas, to take part in community activities. The most vulnerable members of our community will find the castle safe, nurturing and welcoming environment due to our partnership well-being projects. <p>Long term</p> <ul style="list-style-type: none"> We will be an independent organisation with a sustainable operational model that will make us more resilient to change. Our visitor numbers will increase, and our raised profile will help contribute to the local economy of Braemar village and the surrounding area. Our new infrastructure will offer more flexibility to our visitors and community, and open up new opportunities for income generation. Our volunteers will be better trained to share our heritage and become long-term advocates for the Castle and its community. Our new interpretation and activities will meet the needs and interests of our audiences and ensure a wider range of people engage effectively with our themes and storylines. 		

Appendix C

DATA PROCESSING SCHEDULE **DELETE ALL THE FOLLOWING IF NOT APPLICABLE TO THE REQUIREMENT**

Example: Statement of Personal Data to be processed by the Contractor under this contract.

The data processing activities carried out by the Contractor under this Contract are as follows:	
1. Subject matter	
[Insert subject matter for example, to carry out a payroll service on behalf of the Council]	
2. Duration:	
[Insert specific duration, or for duration of the contract between the Council and the Contractor dated [insert date]]	
3. Nature and purpose:	
[Insert description of the nature and purpose of the processing, for example, to administer and host the payroll service]	
4. Types of Personal Data	
[Insert details of all the types of personal data the contractor will be required to process.]	
5. Data subjects	
[Insert information about the person/people regarding whom the data is held (and therefore have rights to know what data about them is held), e.g. using the payroll example the data subjects would be Fife Council employees / anyone who is to be paid by the payroll.]	
6. Outputs:	
[Insert what will be achieved as a result of the data being processed, e.g. using the payroll example the output is that employees will be paid the right amount, to the right place at the right time.]	

Processing conditions

The following conditions shall apply to the said data processing:

DATA PROTECTION

- The parties acknowledge that RtS Project Board is the Data Controller and the Contractor is the Data Processor in respect of any Personal Data which is either provided to the Contractor by the project team, is accessed by the Contractor on the authority of the RtS Project Board or is otherwise received by the Contractor on the RtS Project Board's behalf, in connection with the performance of the Services.
- In construing this Clause (as defined below) the following expressions shall have the meaning set out opposite:
- "Data Protection Legislation" means any applicable law relating to the processing, privacy and use of Personal Data applicable to the Project Team and/or the Contractor including the Regulation of the European Parliament and of the Council on the protection of natural persons with regard to the processing of personal data and on the free movement of such data, the General Data Protection Regulation (2016/279) and/or any corresponding or equivalent national laws or regulations, once in force and applicable including the Data Protection Act 2018 and includes any judicial or administrative interpretation of them, any guidance, guidelines, codes of practice, approved codes of conduct or approved certification mechanisms issued by any relevant Supervisory Authority including the UK Information Commissioner;
- "Personal Data", "Data Controller", "Data Processor", "processing", "Data Subject", and "Supervisory Authority" shall have the meanings ascribed to them by the Data Protection Legislation as in force (and related terms such as "process" shall have corresponding meanings).

In respect of any Personal Data which the Contractor processes on behalf of the RtS Project board, the Contractor hereby warrants –

- That the processing will be subject to reasonable and appropriate technical and organisational measures in relation to the Project's Personal Data
 - i) such that the processing will meet the requirements of the Data Protection Legislation and ensure the protection of the rights of Data Subjects and ii) so as to ensure a level of security in respect of the Personal Data processed by it appropriate to the harm which might result from any processing (and having regard to the nature of the Personal Data which is to be protected), in particular from accidental or unlawful destruction, loss, alteration, unauthorised disclosure of, or access to the Personal Data transmitted, stored or otherwise processed;
- That it will only process such Personal Data solely for the purposes of carrying out the Contract and in accordance with documented instructions from the RtS Project Board and for no other purpose or manner except with the express written consent of the RtS Project Board;
- To obtain the prior written consent of the Project Manager in order to transfer the Personal Data to any sub-contractors for processing and, if written consent is granted, ensure that the sub- contractors are made aware of its obligations in terms of this Clause and require that they enter into a similar written contract with the Contractor;
- To notify the Project Manager immediately and within 48 hours of becoming aware of any

breach of the Data Protection Legislation including, but not limited to, an actual, potential or attempted breach and to provide all reasonable assistance to the RtS Project Board in relation to this matter;

To ensure that:

- all staff who are involved in processing Personal Data on behalf of the RtS Project Team receive the appropriate training in Data Protection Legislation and procedures relating thereto and the Contractor keeps appropriate records of such training received by staff and contents of all courses;
- no other agents or employees of the Contractor are given access to the RtS Project Personal Data;
- All staff who fall within clause 2.5.1 are informed of the confidential nature of the RtS Project's Personal Data and comply with the obligations set out in this clause and are bound by appropriate obligations of confidentiality;
- none of their personnel publish, disclose, or divulge whether directly or indirectly any of the project's Personal Data to any third party unless directed to do so in writing.
- to provide a written description of the technical and organisation methods employed by them for processing Personal Data (within the reasonable timescales);
- to provide reasonable assistance, information and co-operation to the RtS Project Board in complying with its obligations relating to data security, breach notifications, data protection impact assessments and related prior consultation procedures taking into account the nature of processing and the information available to the Contractor;
- to not transfer or disclose any Personal Data outside the European Economic Area or to an international organisation without the express prior written consent of the RtS Project Board, unless required to do so by Union or Member State law to which the Contractor is subject; in such a case, the Contractor shall inform the BCL of that legal requirement before processing, unless that law prohibits such information on important grounds of public interest;
- to notify the Project Manager within five business days if it receives a request from a Data Subject to have access to that person's Personal Data or a complaint or other request relating to the RtS project board's obligations under the Data Protection Legislation;
- Immediately inform the Project Manager if, in the Contractor's opinion, a documented instruction from the BCL infringes the Data Protection Legislation.

Personal Data which the Contractor processes on behalf of the project will at all times remain the property of the BCL.

- The Contractor shall securely delete or return to the Project Manager, at the RtS Project Board's written request, all the Personal Data in its possession or under its control upon termination of the Contract within such reasonable timescales as may be prescribed by the RtS Project Board and securely delete existing copies unless the Contractor is required by law to retain it (and to only retain it for that specific timeframe and for that purpose). All processing by the Contractor will end except for any processing required by law or which is necessary to bring the contract to an end.
- The RtS Project Board may, subject to giving reasonable prior notice and ensuring the minimal disruption to the Contractor's business, undertake an audit of the Contractor's data processing facilities, procedures and policies in order to ascertain compliance with the terms of this Clause.
- In the event of receiving a request for any information pursuant to the Freedom of Information

(Scotland) Act 2002; the Freedom of Information Act 2000 or the Environmental Information (Scotland) Regulations 2004, not to respond to the person making such request but to inform the Project Manager within two (2) working days, and assist the Project Manager with all such requests for information which may be received from any person within such timescales as may be prescribed by the Council.

- The Contractor shall indemnify the RtS Project Board and BCL against all losses, liabilities, damages costs, expenses, claims and others actions arising directly or indirectly out of a breach of this clause by the Contractor.