



# EVALUATION PLAN BRIEF

Holy Trinity Church: New Community Hub

## **Holy Trinity Church: New Community Hub**

The renovation of one of Colchester's oldest buildings to put it at the centre of a city community.



**Role:** Development of an Evaluation plan to support round 2 (delivery phase) of The National Lottery Heritage Fund project at Holy Trinity Church, Colchester.

**Location:** Hybrid

**Brief:** As part of this project, we are seeking an evaluation consultant who will work with us to provide an independent overview of the delivery of our project; and design and deliver an independent evaluation of our project's outcomes to The National Lottery Heritage Fund.

**Reporting to:** Colchester City Council Economic Regeneration Manager.

**Contract Length:** April to September 2024.

**Budget:** There is an indicative budget for this work of £20,000 inclusive of all expenses, but excluding VAT. A fixed fee proposal is required. This contract is in two parts, the initial contract for £10,000 covers the development stage only, after which there'll be a contractual break. Subject to a successful round 2 application and delivery stage award, a further £10,000 will be awarded for the delivery stage.

Consultancies must make Colchester City Council (CCC) aware of whether VAT is applicable from the outset.

**Tender issued:** Monday 4<sup>th</sup> March 2024

**Deadline for submissions:** Thursday 28<sup>th</sup> March 2024

**Contract award:** Mid-April 2024 for start on 1<sup>st</sup> May 2024

**How to apply:** Please complete the attached bidder response document and return by the closing date of 29<sup>th</sup> March 2024 to [matthew.brown@colchester.gov.uk](mailto:matthew.brown@colchester.gov.uk)

**Payment schedule will be mutually agreed upon appointment of the consultant.**

Please note that Colchester City Council will consider the same consultancy for more than one commission, particularly in relation to the Interpretation, Evaluation and Activity planning.

**Summary:** The brief is for an Evaluation Consultant for the "Holy Trinity Church: New Community Hub" Project during both the development and delivery phases. They will work closely with the project team to develop an evaluation framework, toolkit, methodology and training where needed. The consultant will also be responsible for periodic reporting and compiling the final Evaluation Report and 'Sharing Lessons' document. The intended approach to evaluation being taken by this project is based on an iterative process, with continual learning recorded to inform next stages. The methods for monitoring and evaluation will accurately and appropriately map required data, using participatory and creative forms where appropriate. Final reporting will be closely aligned with the recently updated National Lottery Heritage Fund Evaluation Guidelines -

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

**Project Overview:** Colchester City Council (CCC) is planning a sensitive restoration and repair of this recognised (Gr1 listed) heritage asset, located at the heart of Colchester's city centre, and its conversion into a new community hub. The project has been successful in securing viability-stage and development-stage funding from the Architectural Heritage Fund, Town Deal and The National Lottery Heritage Fund programmes. This funding has enabled development of concept, stakeholder engagement, building of a partnership for scheme delivery, preparation of business case, design, and architecture to RIBA2.

This work has been used to develop and prove the project viability and provide confidence in the ability of the Council and our partners to deliver this project. Evaluation is a key component of this project work and is a core requirement of the next stage (Round 2) application.



## Key Project Messages

- The journey of the building both historical and religious.
- Bringing to life the stories of 'Communities in Colchester'.

## Objectives of the Evaluation Plan

Colchester City Council are looking to appoint an experienced, competent consultant to Deliver a comprehensive project evaluation, which is to include:

### Development Phase

- Collation of baseline data via a range of consultation mechanisms.
- Liaising with the project team, particularly
  - 1) the project architect and QS regarding establishing the evaluation for the physical works to building fabric etc.
  - 2) C360 regarding the activity plan.
- Development of a robust evaluation framework to accompany the Round 2 = Delivery Round application which will include preparing and agreeing the format for a Benefits Realisation Plan and/or Monitoring & Evaluation Plan.
- Evaluating the development phase and submitting a report that meets The National Lottery Heritage Funds requirements.

### Delivery Phase

- Developing, piloting and refining evaluation tools that any staff or volunteers can use to evaluate any activities, events and the volunteering experience to learn lessons and feed back into future activities.
- Evaluate programmes with partners including completing the Benefits Realisation Plan and/or Monitoring & Evaluation Plan.
- Work with Colchester City Council and Community360 (C360) as the project comes on stream and reopens initially for limited and managed access; to collate data on visit patterns, volumes, demographic etc.
- Set up and implement a framework to evaluate digital engagement.
- A series of qualitative interviews with members of the Project Board, and Project Team including Design team, consultant and staff involved in the capital restoration to feed into interim report.
- Managing training sessions with C360 staff and volunteers on using evaluation tools effectively and managing data.
- Assist the Project Manager and members of the project steering group with the collection of information on activities, volunteering, training, formal and informal learning, which can be used in preparing The National Lottery Heritage Fund quarterly reports.
- Prepare a final National Lottery Heritage Fund compliant evaluation report of the Project, under the direction of CCC and C360 leads, focused on the extent to which the project met its intended outcomes for inclusion, skills, wellbeing, the local area, economy, and organisational resilience. The report should provide a narrative of the story of change, what went well, what went less well, and lessons learnt for the future of the Church, other similar projects and The National Lottery Heritage Fund itself.
- We anticipate annual interim reports during the Delivery Phase with final report to be prepared at the end of the Delivery Phase. Coordination will also include the following:



- Prepare for and attend some Project Team meeting(s) ensuring sufficient material is provided in at least one week in advance to the Client Project Manager.
- Provide quarterly reports on progress.

**Audiences:** Our aim is to invite as many groups and individuals as possible to take part; and make sure that people can see the point in being involved. We must foster clear understanding of Holy Trinity Church's existing and prospective audiences, together with target groups, to ensure that inclusivity remains at the heart of the project.

- Young People
  - Local schools, further education & Universities – notably St John's Green primary school "One Square Mile: Heritage on our doorstep" project – see: [Facebook](#).
  - Local scouts and guides groups.
  - Young people engaged through local churches.
- Older people including those with dementia, those with disabilities, etc. To reach out and gather 'stories' from the church's past from residents with significant life events at the church (married, baptised, attended funerals etc.)
- Minority groups.
- Special interest groups, i.e. those with an interest in local history and/or interest in ecclesiastical buildings.
- Tourism – Visit Colchester.

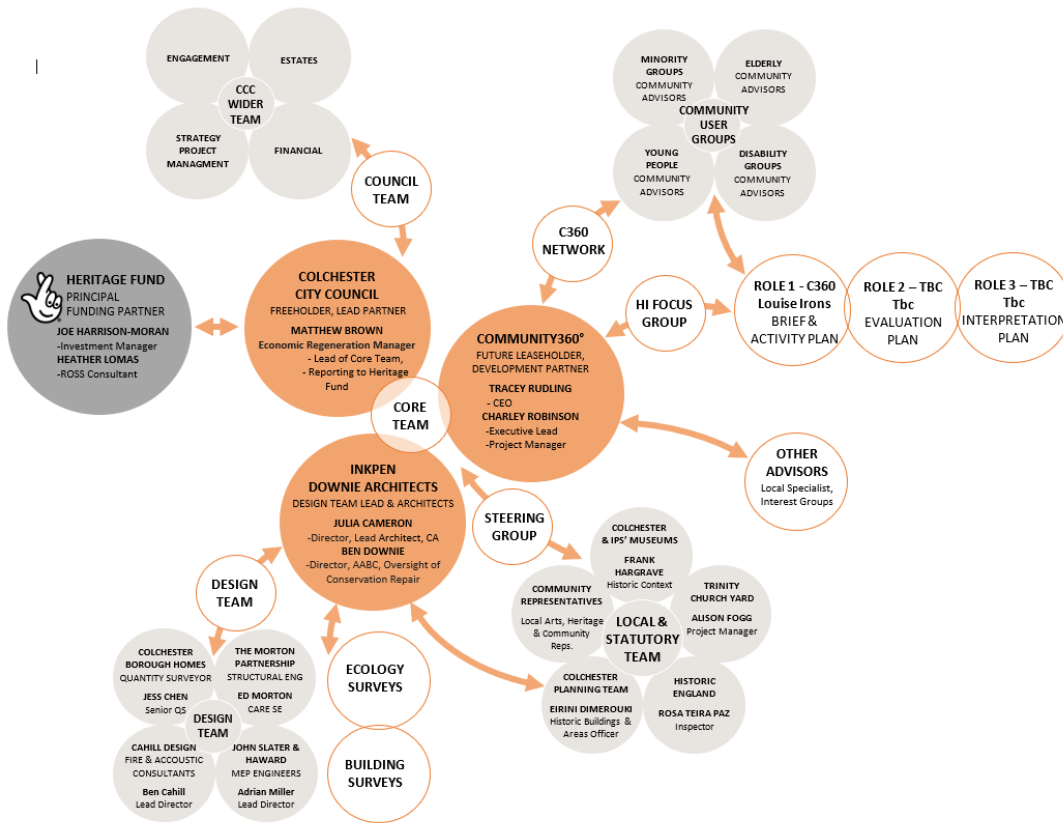
### Skills and Experience

Colchester City Council is looking to appoint a consultant and/or small consultancy which can demonstrate the following:

- At least 3 years' experience of evaluating The National Lottery Heritage Fund capital projects (value of at least £2m) through to completion.
- Experience of evaluating a range of programmes using different methodologies including Benefits Realisation Plans and Monitoring & Evaluation Plans.
- Practical experience of, and access to, tools such as Survey Monkey.
- Commitment to evaluation that encourages a reflective approach to activity.
- Strong report writing and presentation delivery skills.
- Ability to be flexible and work collaboratively with Colchester City Council, Community360 and the rest of the project team.
- A genuine affinity with the Project vision.
- Knowledge of the 8 Principles of Social Value, as defined by Social Value UK, to provide a rounded approach to measuring value.

The attached organogram details all the project stakeholders, key stakeholders being Colchester City Council, Inkpen Downie, One Colchester Delivery Board & Colchester and Ipswich Museums Service (larger version will be provided):

The main contact will be the Economic Regeneration Manager at Colchester City Council (the project lead).





## **Additional Information**

The project team would be happy to share any further information including our full application to The National Lottery Heritage Fund and supporting documents, below you will find some further information to support this brief:

## **Background**

### **key challenges this project addresses:**

Dating from around 1050, and owned by the City Council; our notable, locally loved, and celebrated Holy Trinity Church has not seen regular use since 2017. Key challenges together create the market failure which this project will address:

- The grade 1 listing requires Historic Buildings consent from Historic England and any changes made must be sensitive to the historic fabric.
- Also, the original conveyance from the Church of England to the council in 1956, includes a restrictive covenant limiting future uses to community and cultural only. This prevents any commercial future uses.
- The physical condition of the building is deteriorating. This led to it being added to Historic England's 'heritage at risk' register in 2021.
- Coupled with the poor condition, the building lacks insulation and has an antiquated heating system which with recent energy cost escalation makes it prohibitively expensive to operate, especially for a community sector organisation.
- The council has funded and completed emergency repair works in the summer of 2023, but lacks the resources needed to undertake more extensive works without attracting further external funding.

### **The opportunities this project responds to:**

Recognising the need to develop a future use which addresses these challenges; since 2019 the council and C360 have been working together in partnership to develop a scheme which will deliver a viable and secure long-term future for the building:

- The project has already secured c. £500k Town Deal funding which can leverage heritage funding. A business case and initial feasibility work including architecture to RIBA stage 2 has already been completed, and a design team are now mobilised to work on this exciting project.
- An approach has been made to The National Lottery Heritage Fund who approved an expression of interest for this scheme in February 2023, and a Round 1 bid was submitted in August 2023 and approved in early 2024.
- If approved, the Round 2 (delivery stage) funding will enable the full repair of the core fabric of the building, the upgrades to key features such as heating & insulation, addressing accessibility and similar issues, and finally the conversion of the building into a hub for the future use of Community360, replacing its current operational base at Long Wyre Street, Colchester.
- Alongside this, historic interpretation will be enhanced, and the church can play a role in heritage tours and open days, recognising its status as the oldest standing building in the city centre, and the best surviving Saxon entrance arch. Through C360, a programme of volunteering will engage people in the rich heritage and history.
- Following this one-off full repair and conversion, C360 will take the building on a long-term basis (subject to negotiation and agreement prior to The National Lottery Heritage Fund R2 bid submission), with rent forming the basis of a sinking fund, catering for long-term maintenance.



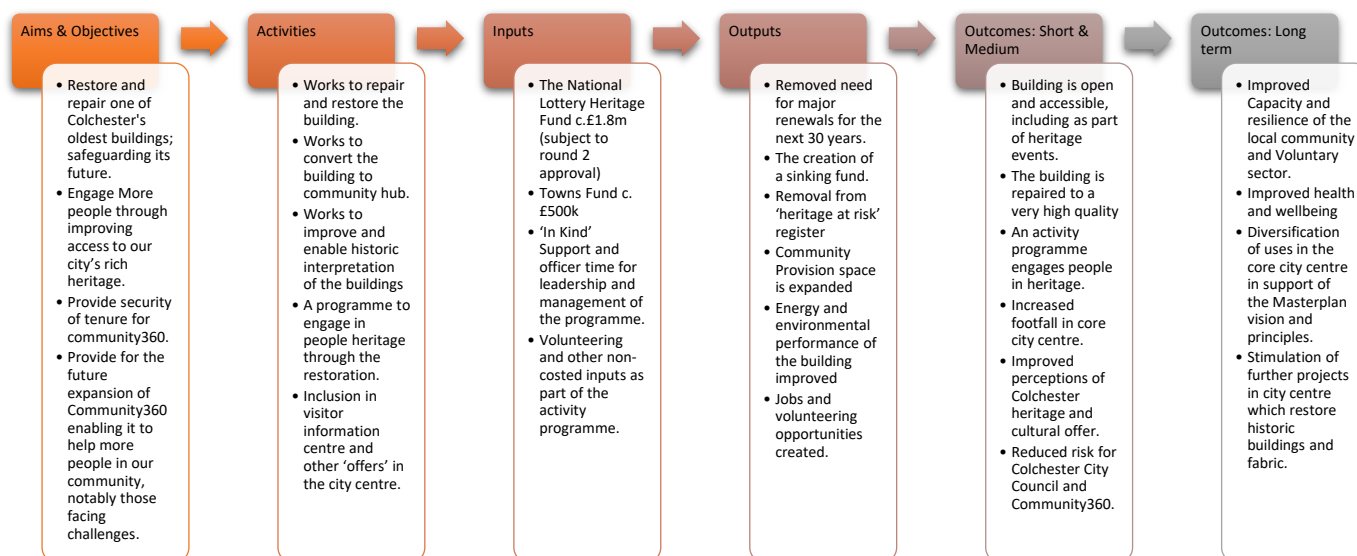


- The scheme complements the adjacent, though independent scheme also within the Town Deal programme to convert the churchyard into an accessible public space which recently secure planning approval (details available on request).

In summary the scheme safeguards and provides a sustainable long-term future for our city's oldest building, provides security of tenure for Community360 in bespoke, high-quality facilities catering for future growth, and enables more people to be engaged in our city's rich heritage.

The project has received significant support and backing from statutory organisations, along with the wider community and special interest groups. Aside from the Council and Community360 (the project delivery partners), those in strong support of the scheme include Historic England, Colchester & Ipswich Museums Service, North Essex Heritage (leading the 'Jumbo' restoration project), The Church of England Commissioners, Colchester Tourist Guides Association, Colchester Civic Society, Friends of Essex Churches, Essex Heritage Trust, the Business Improvement District, Will Quince the outgoing MP for Colchester, the NHS, the 'We are Colchester' (Town Deal) board, and the Bishop of Colchester. The director of Colchester's Mercury Theatre is also providing practical support and check-and-challenge to the project lead.

### Project objectives, outputs, and outcomes



### The project journey to date:

Since the initial work to secure a new tenant for the building following the vacation by its previous long-term tenant in April 2017, the Council and Community360 have worked tirelessly to bring this important scheme forward. This journey is described in broad terms in the Round 1 application; however it is felt valuable to bring the timeline of the scheme as a whole together in one cohesive summary:

When	What	Who	Why / How / Narrative
April 2017	The previous tenants of the	The Go4 Community	The need to cover high energy costs and make repairs to the building were beyond the means of a



When	What	Who	Why / How / Narrative
	church surrender their lease, ending regular use of the building.	Café and Craft Centre.	small local charity; this is identified as the key market failure to which this project responds.
2017-2018	Seeking a new tenant to take on the building.	Colchester City Council Communities Team.	The Council undertook a formal process to promote the building and seek expressions of interest to take it on along similar terms to Go4's previous lease arrangement. This exercise was unsuccessful.
Late 2019	Agreement to enter a new partnership to develop future uses for the building.	Colchester City Council & Community 360.	CCC and Community360 informally agree to work together. A successful application was made to the Architectural Heritage Fund (AHF) 'project viability' grants programme.
Early 2020	Project viability work undertaken.	Community 360.	Following award, Community360 commissioned the project architect Inkpen Downie, and a project viability and options appraisal exercise was undertaken. This work included in-depth and costed condition surveys which considered the entire building.
Mid 2021	Project viability report completed and submitted to AHF.	Community 360.	Upon completion this work was submitted to AHF and a further successful application to AHF's 'project development' grants programme was then made; though the awarded monies were not drawn down as they were intended to be held back to be used later.
Mid 2021	The building was added to Historic England's 'Heritage at Risk' register.	Historic England.	Refer to main application and part of <u>Supporting Document SD16: condition survey</u> . This includes the Historic England assessment report in full.
Mid 2021	The project was included within Colchester's Town Investment Plan and Town Deal programme.	Colchester City Council.	The scheme was added to the Town Deal programme, and £517k of funding was sought, providing for all the future partner funding contributions required to bring the scheme forward.
Early 2022	Town Deal Business Case was prepared and included within Colchester's submission to Government. This was approved in Spring 2022.	Community 360.	Town Deal Business Case was prepared.
Mid 2022	Community360's board of trustees requested a pause to the scheme due to the high level of risk and uncertainty.	Community 360.	Discussion between Community360 and the Council resulted in Community360 withdrawing as project lead, but retaining appetite to support the project and take on the building once the repair and conversion programme is completed.





When	What	Who	Why / How / Narrative
2022/23	<p>The Council agreed to undertake priority 1 works to the building.</p> <p>The Council commenced preparation of the application to The National Lottery Heritage Fund.</p>	Colchester City Council.	<p>Colchester Borough Homes were commissioned in April 2023 to undertake all the priority 1 repairs to the building. These works were completed July 2023.</p> <p>Colchester City Council submitted an expression of interest to The National Lottery Heritage Fund for this scheme, which was approved.</p>
Mid 2023	Prepare The National Lottery Heritage Fund Round 1 application.	Colchester City Council.	<p>More in-depth engagement commenced between the Council and the National Lottery Heritage Fund programme, and work was undertaken to refresh/update the project including wider engagement, working up the scheme to ensure good fit with The National Lottery Heritage Fund heritage grants programme.</p> <p>Reviewing all costs to establish the level of The National Lottery Heritage Fund investment needed, gathering quotations from relevant suppliers to demonstrate that the development phase can be achieved within budget and can proceed (subject to seeking further quotations to meet procurement requirements) swiftly in event of permission to start, entering new / refreshed partnership arrangements, and seeking wider support to and engagement in the scheme.</p> <p>Engage with Historic England who as well as providing support to the application in writing, advised that they are minded to support further non-essential works to the tower, and invited a 'repairs grant' application for further funding.</p>
August 2023	Submit The National Lottery Heritage Fund Round 1 application.	Colchester City Council.	The Round 1 application was submitted to The National Lottery Heritage Fund
September 2023	Approval of Expression of Interest to HE 'Heritage At Risk Grants' programme.	Colchester City Council.	A full application for £250k to HE for discretionary / non-dependent works to the tower will be prepared in tandem with the development phase.
September 2023	Approval of Expression of Interest to DLUHC 'Community Ownership Fund' programme.	Colchester City Council with C360.	A full application for £250k to CoF for enhancements to the building specification and further features (ICT, energy efficiency, storage) will be prepared in tandem with the development phase.
October 2023	Initial informal feedback and request for	The National Lottery	Further evidence and narrative requested and supplied by CCC lead.



When	What	Who	Why / How / Narrative
	supplementary information from The National Lottery Heritage Fund.	Heritage Fund assessor.	
December 2023	Informal advice from THLHF	The National Lottery Heritage Fund.	Embargoed confirmation of a development stage award to the project.
January 2024	Project inception meeting	All.	Discuss and agree further requirements prior to permission to start.
February 2024	Permission to start from The National Lottery Heritage Fund	The National Lottery Heritage Fund.	Formal confirmation of project commencement.

Future Key Project Milestones (proposed):

When	What	Who	Why / How / Narrative
September 2024	Mid-stage review with The National Lottery Heritage Fund	All.	Mid-stage review of the development phase. If successful, permission to submit is granted.
November 2024	Round 2 Submission	Project team.	Submission of Planning Application, Historic Buildings Consent, R2 application to The National Lottery Heritage Fund accompanied by Activity Plan, Historic Interpretation Plan, Business Plan, Evaluation Plan and other key appendices.
March 2025	Decision and permission to start (delivery phase)	The National Lottery Heritage Fund.	Subject to successful outcome of Round 2 application, planning consent & historic buildings consent.
November 2025	Repairs and conversion start	All.	The physical on-site phase of the project commences.
August 2026	Repairs and conversion end.	All.	The physical on-site phase of the project ends.
October 2026	Handover to operation.	All.	The building re-opens as the new community hub.



## About The National Lottery Heritage Fund

As the largest dedicated funder of the UK's heritage, The National Lottery Heritage Fund's vision is for heritage to be valued, cared for and sustained for everyone, now and in the future as set out in the strategic plan, [Heritage 2033](#).

Over the next ten years, the Heritage Fund aims to invest £3.6billion raised for good causes by National Lottery players to bring about benefits for people, places and the natural environment.

The Heritage Fund helps protect, transform and share the things from the past that people care about, from popular museums and historic places, our natural environment and fragile species, to the languages and cultural traditions that celebrate who we are.

The Heritage Fund is passionate about heritage and committed to driving innovation and collaboration to make a positive difference to people's lives today, while leaving a lasting legacy for future generations to enjoy.

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