



Brief for Evaluation Consultant

1. Introduction

Dorset Wildlife Trust seeks to appoint a consultant to coordinate the evaluation of its project Nature Connection North Dorset, funded by The National Lottery Heritage Fund.

The Evaluation Plan will be developed during the Development Phase of the project for implementation by the Dorset Wildlife Trust in-house team with support from the consultant in the Delivery Phase.

2. Background to the Project

Nature Connection North Dorset aims to facilitate community involvement in conserving and enhancing local natural heritage over a five-year period. Through working with communities to enhance or create new spaces for nature, we aim to foster a shared vision for nature recovery in Dorset, promoting ecological resilience and community well-being. The project revolves around three interlinked themes: Wildlife Connections, Community Connections, and Personal Connections, with activities designed to connect people to their natural heritage, improve understanding of environmental issues, and inspire collective action.

Funding has been received from The National Lottery Heritage Fund to develop the project and prepare the application for the five-year project Delivery Phase. It is anticipated that this application will be submitted in February 2027.

The aim is for the Delivery Phase to run from July 2027 through to June 2032. All activities will run throughout, with an interim Evaluation Report required at the end of Year 3 and a full Evaluation Report required at the end of Year 5.

3. Scope of the work

The role of the consultant will be delivered in two stages:

Development Phase (Stage 1) – preparation of an Evaluation Framework in line with The National Lottery Heritage Fund good practice guidance. Collection of baseline data, including support for the in-house project team in undertaking research, consultations and trial activities to inform the preparation of the Activity Plan.

Delivery Phase (Stage 2) – Building on work carried out in the Development Phase, support staff, contractors and volunteers to undertake collection of evaluation data during the delivery phase and to write the interim and final Evaluation Reports.

Helping us to improve as we progress will be as important as compiling the final report. We will expect the evaluation consultant to work closely with us during the life of the project.

****Please note that progression to the Delivery Phase will be dependent on the success of the Stage 2 application to The National Lottery Heritage Fund and the performance of the consultant.****

Development Phase:

The consultant will:

- Review project documents
- Review current qualitative evaluation methods for community work being developed by The Wildlife Trusts.
- Convene a start-up meeting/workshop with the project development team.
- Using the workshop findings, develop a detailed evaluation framework, aligned to The National Lottery Heritage Fund and project outcomes.
 - The framework will set out the key performance indicators (and associated quality indicators) expected from delivering each of the activities identified within the Activity Plan and other appropriate plans, as well as identifying the time-line when critical outcomes are expected.
 - The framework will detail the frequency with which monitoring will be carried out and identify the most effective manner in which it should be carried out with specific audiences.
 - Within the framework, develop a mechanism by which the results gleaned from the monitoring activity can be reviewed, collated and interpreted. This will inform an action plan identifying all steps necessary to enhance the future programme development and delivery.
- Design a toolkit that staff and volunteers will use to collect the evaluation data throughout the Development and Delivery Phases.
- Provide support to staff and volunteers throughout the Development Phase to facilitate data collection.
- Identify project risks to successful evaluation and appropriate mitigation.
- Produce a report on base-line research as part of the Evaluation Framework for the Delivery Phase.

Delivery Phase:

The consultant will:

- Re-visit the Evaluation Framework and plan for the Delivery Phase, to ensure alignment with each of the activities and audiences identified in the final Activity Plan and the time-line when critical outcomes are expected.
- Convene a start-up workshop with the project delivery team to ensure that the evaluation process is understood and embedded in the Delivery Phase from the start.

- Train staff and volunteers in the principles and techniques of evaluation and how to use the toolkit in the Delivery Phase.
- Provide support to staff and volunteers throughout the Delivery Phase to facilitate data collection.
- Undertake selected community consultation to complement staff data collection.
- Facilitate reflection amongst the project delivery team through milestone workshop activity.
- Ensure that evaluation of the project meets The National Lottery Heritage Fund and other funders' requirements.
- Review progress annually and produce an interim evaluation report in year 3.
- Produce a comprehensive final evaluation report at the end of year 5 including summary of key findings, lessons learnt and detailed recommendations for the legacy of the project.

4. Expected outputs

Development Phase:

- 1 x workshop with project development team
- Detailed Evaluation Framework including base line report
- Toolkit to collect evaluation data

Delivery Phase:

- 3 x workshops with project delivery team: Start up, mid stage, end of project
- Selected stakeholder interviews/consultations to complement project staff data collection.
- Annual progress reports.
- Interim Evaluation Report following mid stage workshop.
- A high-quality Evaluation Report at the end of the project which will include:
 - A qualitative assessment of the extent to which the project has met its vision and delivered its strategic objectives
 - A quantitative and qualitative assessment of the extent to which the project has delivered against the outcomes set out in the Phase 2 application form and The National Lottery Heritage Fund approved purposes.
 - A quantitative and qualitative assessment of the impacts of each activity
 - Key successes and challenges.
 - Articulation of the evaluation legacy going forward

5. Available documentation (upon request)

- Nature Connection North Dorset Consultation & Research Report
- Nature Connection North Dorset Activity Planning
- Nature Connection North Dorset Project Briefing

6. Management of the commission

The commission will be managed by Nicki Brunt reporting to the Project Advisory Committee and The National Lottery Heritage Fund Senior Investment Manager and project monitor. We expect a commissioning meeting and regular communication throughout the project.

7. Skills required

We are looking for a consultant with excellent communication skills, able to inspire and engage people with a wide range of backgrounds and skills.

The consultant should have experience and expertise in:

- Evaluation of heritage projects
- Analysis of data, outputs and outcomes
- Working with heritage organisations
- Writing evaluation framework documents to The National Lottery Heritage Fund guidelines
- Ability to write clear and accurate copy
- Supporting teams to develop as projects progress
- Working with community groups to ensure evaluation is inclusive and fit for purpose

The successful candidate / company are expected to have public liability insurance of at least £2 million as well as a standard DBS check.

8. Requirements of the submission

Your proposal should include:

- Approach to the project and implementation methodology
- CVs of proposed team members
- Examples of similar projects undertaken
- Two client references
- A fixed fee showing your daily rates between individuals, number of days spent on each task and including all fees and expenses
- Projected timescale

9. Date of submission and timescale

The submission deadline for tenders is **5pm 12 July** and should be submitted to **Nicki Brunt, nbrunt@dorsetwildlifetrust.org.uk**. We will acknowledge receipt of all submissions.

The maximum fee for the Evaluation Plan is:

£7,500 excluding VAT, but including all expenses for the Development Phase.
£20,000 excluding VAT, but including all expenses for the Delivery Phase.

For the Development Phase, we expect the contract to be completed by 31 December 2026, with an interim report by 9 October.

For the Delivery Phase, we expect the contract to be completed within 1 month of the completion of the 5-year project activity delivery.

For an informal discussion or to request further documentation, please contact:
Nicki Brunt, nbrunt@dorsetwildlifetrust.org.uk

10. Tender Evaluation

The criteria for the appointment is as follows:

Selection criteria	Weighting
Quality and experience	50%
Methodology and approach to commission	40%
Interview	10%
TOTAL	100%

Short-listed candidates will be notified week commencing **13 July**. Interviews will take place on **20 or 21** July online.

As part of the interview, short listed candidates will be required to give a short presentation outlining how and why they are best suited to the work tendered.

The award of the contract will be based on the most advantageous tender in terms of the stated criteria. Dorset Wildlife Trust will not pay for any costs of any tenderer. Dorset Wildlife Trust reserve the right not (a) to make an appointment or (b) to accept the tender with the lowest price and may take other factors into account in assessing the tender responses received by them. The successful consultant will be required to enter into a contract with Dorset Wildlife Trust in a form to be agreed.

Using money raised by National Lottery players, The National Lottery Heritage Fund supports projects that connect people and communities with the UK's heritage. Nature Connection North Dorset is made possible with The National Lottery Heritage Fund