

Brief for a Project Evaluator

1.1 INTRODUCTION

- Introduction to the organisation
- Summary of the project outputs – what will your project do?
- Summary of project outcomes – what difference do you want the project to make, and what will the evaluator need to measure?
- Summary of target audiences
- Summary of key stakeholders and partners

1.2 OUR REQUIREMENTS

Deliverables

The evaluation consultant will be required to:

- Produce an evaluation framework which sets out targets, benchmarks, evaluation methodology and action plan
- Deliver an evaluation methodology which measures the difference the project has made and to whom
- Produce (a) formative interim evaluation report(s) or reviews which support the organisation's planning and development of their ongoing programme.
- Produce summative evaluation report which is compliant with (*funder*) guidelines

Approach

We envisage that the consultant will

- Hold X workshops with the project team - one to develop the evaluation framework, one (*or more*) to review at interim stages, and one to review the final report
- Help the organisation to collect any benchmarking data which is not yet available
- Undertake monthly/quarterly updates with senior staff either by phone or in person
- Develop and analyse questionnaire and surveys
- Develop a spreadsheet for collecting quantitative data to be collected by the project team, e.g. visitor numbers, event attendees
- Be actively involved in data collection, and attend an agreed number of key events and activities
- Feedback informally at regular intervals with emerging findings and recommendations
- Write the interim (formative) and final (summative) evaluation reports.

Quantitative and Qualitative evaluation methods anticipated include, but are not limited to

- Visitor, participant and volunteer surveys
- Interviews with staff, volunteers, trainees and partners
- Focus groups and workshops with staff, volunteer, trainees, partners, audiences and stakeholders

Reporting

The resultant reports will clearly set out

- The difference the project intended to make
- The extent to which the project achieved its intended outputs (what happened)
- The extent to which the project achieved its intended outcomes (what difference it made)
- How the project was managed and delivered
- Key successes and lessons learnt
- Project Legacy
- Recommendations – for the organisation, for sector colleagues and for funders

The reports will also include

- Methodology, including sample sizes and confidence levels
- Case studies and/or pen portraits
- An analysis of quantitative data, including survey results, social media and number of participants/programmes/events
- An analysis of qualitative data, including comments, interviews and observation

1.3 PROGRAMME DATES

The contract will begin in XX, and the final evaluation report will be due XX. The timetable that follows is indicative and subject to change.

Milestone	Date
Permission to Start	
Evaluation Consultant Appointed	
Evaluation Framework submitted	
Building Work to commence	
Activity Plan begins	
Interim Evaluation Review	
Building Work Completes	
Public Opening	
Draft Final Evaluation Report	
Completion of Activity Plan	
Final Evaluation Report	
Grant Expiry Date	

1.4 BUDGET

The fixed fee for the Evaluation will be £XX excluding VAT but including all fees and expenses. The organisation will issue a contract for this work and make payments at appointment and following interim reviews and final reports against invoices for work completed to their satisfaction.

1.5 TENDER REQUIREMENTS

To tender you must submit a concise proposal to carry out this project that includes:

- Names and responsibilities of proposed project team including outline CVs. Please name the lead consultant and day to day contact
- Experience and track record, including at least three case studies of similar work carried out by project team members. Please name each team member involved in each case study *NB, if your project includes specialisms such as working with learning programmes or specific audiences, please include details and request relevant experience.*
- Project methodology, including timetable and outline workplan with days and day rates for each task and associated expenses
- Confirmation that you can deliver the final report by the deadline
- The tender total should include all expenses and disbursements, held for a period of 6 months.
- Prices to be quoted exclusive of VAT
- Names and contact details of two referees for whom the consultant has recently undertaken relevant projects.

Shortlisted applicants may be required to attend an interview as part of the selection process on XX/XX/XXXX. The lead consultant will be required to attend the interview and lead a presentation, if a presentation is required.

1.6 TENDER EVALUATION

The contract will be awarded on a scored assessment. Tenders will be evaluated on the basis of:

- Value for money 30%
- Relevant experience of the project team 30%
- Understanding of the brief and quality of methodology for addressing it 40%

The client reserves the right not to appoint any of the tenderers.

1.7 SUBMISSION OF TENDERS

Please email your tender to XX by XX

Notes and tips for organisations preparing a brief

- Appoint your evaluator as early on in the process as you possibly can. You will get a better quality evaluation, as well as emerging recommendations which will help your project improve as it develops
- Even the best evaluator cannot produce a good evaluation report without considerable input from the client team. Do plan this into your project resourcing. Include inputting into the evaluation in your supplier briefs, job descriptions and partnership agreements.
- Setting the budget: with evaluation, you get what you pay for! Do set a budget – either fixed, indicative or budget range - otherwise you may be considered to be not tendering fairly. We would expect a small project which will be completed within a year to be budgeting between £5-£10k. A medium sized project which will be completed over a number of years is likely to need a budget of at least £15k – and if it is over 3 or more years, or a large/complex project then consider a budget of at least £25k. If your budget for evaluation is under £5k, you may want to consider producing the report inhouse, but commissioning a mentor to help you.
- Do include a timetable, even if it indicative and subject to change.
- If your project is running over a number of years, we would recommend asking for one interim report per year, or at least at critical milestones.
- Allow at least 2 weeks from advertising your contract to submission deadline, in order to allow tenderers to prepare a quality proposal.
- Set and include interview dates, and encourage applicants to hold these in their diaries – you might miss out on a really good consultant if they can't make an interview at short notice (and if they are good, they will always prioritise existing clients over potential new work!).
- Be prepared to share extracts from your key documents e.g. your funding application. This will help tenderers to prepare a meaningful proposal and methodology.
- Set a reasonable page limit for the tender proposal, so that potential consultants can adequately answer your questions, but so that you don't have to read too long a document. 10-12 pages is ideal.

A note from the author

This template and notes have been authored by Anna Cullum Associates. It is an indicative sample document, and has not been approved by any other body. Views expressed are mine alone and based on years of experience! I am happy for anyone to use this document to develop their own brief, but note that the author cannot be responsible for your use of the information contained in this document. And all I ask in return is that you remember my name, and perhaps even pass it on....! Yours, Anna Cullum

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