

**Oxford Botanic Garden & Arboretum (OBGA)**

**Harcourt Arboretum Visitor and Learning Centre – A Gateway to Nature**

**NL-21-00033**

**National Lottery Heritage Fund Stage 2 Application**

**September 2022**



**Activity Plan Consultant Brief**

**Introduction**

Oxford Botanic Garden and Arboretum (OBGA) is part of Oxford University’s Gardens, Libraries and Museums (GLAM) Division.

Harcourt Arboretum comprises 130 acres of Grade One listed heritage landscape and contains threatened trees from across the globe as well as threatened, local wildflower meadows and native woodland. We have a unique opportunity to increase access to this unique heritage and natural capital. But currently, most visitors are local, Friends of the gardens and arboretum, families, or adults with specific interests in trees. Our ‘gateway to nature’ project will transform our site and diversity our audiences.

The Arboretum holds a living collection of trees set within a unique mosaic of woodlands, coppices, meadows and ponds. This historic, *Picturesque* landscape contains the best collection of trees in Oxfordshire. Visitors can wander among galleries of trees, the unique Serpentine Ride, and threatened Oxfordshire and UK wildflower meadows. These habitats provide a home not only for trees and wild flowers but also for a wide range of animals and insects: deer, badgers, bats, dragonflies, owls, and woodland birds. Together these habitats support an amazing range of biodiversity at risk across the UK. We exist in a state of climate emergency: there has never been a more important time to engage people with the importance of trees and wildlife. The Arboretum has significant untapped potential to foster a care and appreciation of nature. However, to achieve this we must improve our offer. At the centre of this transformational project is a new Visitor and Learning Centre (VLC). We currently have limited facilities to deliver impactful, educational work at the core of our mission and values. The new VLC will enable us to:

* Diversify our visitor profile by providing facilities such as educational, exhibition, café and retail to help us engage local communities. We will develop our offer through partnership working, enhanced by the new facilities;
* Become a family friendly site. Members of staff will use local networks and children centres to introduce the Arboretum as a fun, engaging place to visit. The VLC will be an essential space to welcome groups and families;
* Improve wellbeing for those with mental health issues. We will develop nature-based activities in partnership with the University of Oxford’s Department of Psychiatry. Participants for these activities will come from the local Oxfordshire social prescribing partnership, including patients from Warneford hospital and mental health charity Restore. This will become a sector leading example and template for social prescribing – dialling up access to nature to improve health and wellbeing;
* Provide an all-weather visitor and educational experience. The VLC will provide space for educational activity and exhibitions, come rain or shine;
* Improve our commercial revenue with a café and gift shop. By supporting local suppliers and craft makers, the shop and café will be a key opportunity to raise income sustainably, to continue our preservation and conservation activity;
* Increase the understanding of the heritage landscape with activity focusing on biodiversity and the importance of plants. Exciting and innovative interpretation and displays will inspire a generations of environmentally conscious citizens.

**The Brief**

OBGA wishes to appoint an Activity Plan Consultant to support the delivery of the project for the development phase. The consultant will extend and develop the collection, learning and participation proposals, and devise and test further plans and activities that will achieve the project outcomes.

The successful consultant will produce a detailed Activity Plan for submission with a Round Two funding application to the NLHF. This will include:

1. Plans for Audience Engagement and Development, Learning and Participation through a process of consutlation;
2. A fully-costed, 3-year Action Plan for delivering the Activity Plan in the format stipulated by the NLHF;
3. Sustainability plans for project activities, including how they can be developed after the project.

The plans should comply with current NLHF guidelines on Activity Plans, as set out in their ‘Activity Plan Guidance’ and ‘Planning Activities in Heritage Projects’ documents. The Activity Plan should be informed by and consistently focus on OBGA’s priority audiences (set out in the full application, and with further detail in our Audience Development Strategy). Before starting, the consultant must ensure that he/she is fully aware of the latest requirements of the NLHF (Strategic Funding Framework for 2019–2024) and be well-versed in the guidelines for this work.

**Scope of Work**

The successful applicant will work alongside the Project Group, Steering Group and existing staff to deliver outcomes as follows:

**Audience Engagement and Development**

* Identify potential priority audiences, analysing the nature and size of each potential group;
* Commission and deliver audience research using the agreed methodology, and produce summary reports based upon it;
* Organise consultations to support the development of the Interpretation Plan and Learning and Participation Plans, as well as improved opportunities for volunteering;
* Use the work of these consultations to inform the audience development process;
* Work in conjunction with the Project Group in evaluating engagement and responses to the proposed activity;
* Work with GLAM Outreach team, NLHF Education and Outreach officers and the Community Connectors to test market response by devising and delivering pilot activities (for example tree planting activities alongside Tree Warden

**Learning and Participation**

* Review the current offer for visitors and learning audiences (including local schools and children participating in established programmes but also primary and secondary schools, FE institutions and adult education providers) to analyse the extent and quality of this offer. This should include detailed consultation and evaluation with current and potential users;
* Extend this consultation to identify current and future needs, and the learning and participation opportunities the Arboretum might deliver to meet them, including outreach (for example in the form of tree planting with local schools);
* Devise a Learning and Participation Outreach plan, identifying a range of potential activities and projects, with a strong focus on audiences and delivery, which references best practice in learning and volunteering;
* Work with Community Connectors and Education Officers to test viability of plans by devising and delivering a number of pilot activities, taster sessions, events etc. for specific audiences, including an evaluation strategy for these activities.
* Create reports and case studies based on the evaluation of the pilot outreach projects in collaboration with the NLHF Outreach Officers and the Evaluation Consultant, identifying best practice and realistic targets for the delivery phase projects.
* Produce a detailed Activity Plan, including strategies for Audience Development and Learning and Participation, plus a detailed, fully costed Action Plan for delivery.
* Propose a sustainable framework on which the development and delivery of learning outcomes for different target audiences can be based.
* Ensure the Activity Plan proposes the most effective means of achieving engagement, learning and participation for priority audiences, including:

Target audiences:

1. Families in areas with high IMD
2. Older people
3. Under-represented communities
4. People with mental health challenges
5. People with disabilities

As well as:

* Those interested in participating in educational/tree-planting activities;
* Potential volunteers;
* Potential partner organizations among community, education and other groups.

**Wellbeing**

* Wellbeing is a unique feature of this project and the Activity Plan will need to reflect this and work towards the goal of becoming a leader in the field of wellbeing in outdoor space.
* The Activity Plan will join the current work on Social Proscribing, links with the Psychiatry Department and current research into the importance of green spaces in wellbeing in addition to creating new ideas for the future of the site. This will form an important part of the Delivery Phase of the bid.

**Reporting**

The successful consultant will report to the Project Group, submitting regular reports and attending Steering Groups and the NLHF meetings as required.

**Project Timescales**

The work should be carried out between December 2022 and May 2023, with a final plan submitted for approval by OBGA by June 2023 in time for the anticipated NLHF meeting in July 2023.

**Budget**

There is a maximum budget of £25,000 available.

**Tender Requirements**

OBGA requires all those invited to quote to submit a proposal to carry out this project that covers the following:

* Project methodology and programme – short, succinct and practical in nature;
* Outline of the project team (including CVs);
* Fixed price project fee, plus estimate of reasonable expenses;
* Two references.

The tenderer should be able to demonstrate:

* Previous experience of preparing and delivering successful audience development/activity plans;
* Methodology for delivering an effective activity plan within the time frame of the Round 2; application to the NLHF. This must include an adequate consultation programme;
* Demonstrable understanding of the NLHF process;
* Experience of working with local groups and communities;
* Proven skills in consultation and education;
* Proven experience of working with large groups of volunteers.

The tender should be provided in both electronic and paper format.

**Tender Evaluation**

The criteria for the recruitment of a consultant is as follows:

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| **Selection criteria** | **Weighting** |
| Quality and experience | 40% |
| Methodology and approach to commission | 30% |
| Tender Price | 15% |
| Interview | 10% |
| Location of supplier | 5% |
| TOTAL | 100% |

The award of the contract will be based on the most economically advantageous tender in terms of the stated criteria.

**Contact Details**

Please email any questions regarding this brief to: Chris Thorogood chris.thorogood@obg.ox.ac.uk

**Submission of Tenders**

Quotations must be received by end of 28th October 2022.

Quotations may be submitted either electronically or via post. If sent via post, envelopes must be marked on the front with the phrase ‘Activity Plan Tender’. There should be no other identifying marks or company details on the envelope.

Any quotations received after the deadline will be disqualified from the process.

All proposals should be a maximum of 20 pages in length (preferably shorter), excluding appendices.

Short-listed candidates will be invited to attend a presentation and interview process.

Please note that the applicant may also apply for the Interpretation Consultant or the Evaluation Consultant roles.

Please ensure that a fixed price is included with all quotations and send completed tenders to:

Heidi El-Megrisi, Oxford Botanic Garden, Rose Lane, Oxford, OX1 4AZ. heidi.el-megrisi@obg.ox.ac.uk