

Oxford Botanic Garden
& Arboretum

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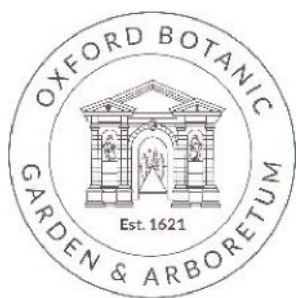
Oxford Botanic Garden & Arboretum (OBGA)

Harcourt Arboretum Visitor and Learning Centre – A Gateway to Nature

NL-21-00033

National Lottery Heritage Fund Stage 2 Application

August 2022



Evaluation Consultant Brief

Introduction

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

The 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 is appointing an Evaluation Consultant to support the delivery of the project for the Development Phase. The consultant will extend and develop 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 Evaluation Plan for submission with a Round Two funding application to the NLHF. The consultant will work with the Department of Psychiatry to ensure the Evaluation framework links to the well-being academic framework. This will include:

- 1) A framework for evaluation during the Development Phase, the Delivery Phase and as an ongoing organizational activity;
- 2) Develop a framework of excellence for evaluating wellbeing in outside space; The Consultant will work closely with the Department of Psychiatry and the GALM Evaluation Officer.
- 3) A strategy and framework for evaluation of the outcomes of the project within the Activity Plan, the Interpretation plans;
- 4) Evaluation that follows the targets set by NHLF and the Development Phase bid.

The plans should comply with current NLHF guidelines on evaluation. The Evaluation 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:

- The Evaluation Consultant will create an evaluation strategy and framework based on the activities and outcomes identified in the activity plan. This will cover the Delivery and post-project phase.
- Wellbeing is a unique feature of this project and the Evaluation Plan will need to reflect this and work towards the goal of becoming a leader in the field of wellbeing in outdoor space working with the Department of Psychiatry.
- The GLAM divisional office provides support across departments including OBGA, and one area of support is the Assessment and Evaluation Unit. This unit has responsibility for collating, analyzing and reporting data about activities and achievements across GLAM departments. Evaluation is a core function of the unit and the consultant will liaise closely with the unit to plan and undertake evaluation of this project.

The unit gathers various data from different sources such as kiosks, surveys, interviews, focus groups, observations, and departments sometimes commission specific evaluation projects externally. The consultant would have access to the data gathered from the Arboretum already and use these data to inform and feed into the evaluation plans for the VLC.

The consultant will be confident in planning and conducting evaluation using frameworks such as logic models, analyzing quantitative and qualitative data - particularly in translating findings into short and long term development plans, and producing evaluation reports highlighting successes and areas for improvement.

Specifically, the scope of the evaluation work will be as follows:

- Coordinate existing audience data collection methods to feed in to Activity Planning and goals;
- Conduct baseline testing for audience demographics and attitudes towards facilities and the Arboretum's heritage and community value;

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 October 2022 and January 2023, with a final plan submitted for approval by OBG by June 2023 in time for the anticipated NLHF meeting in July 2023.

Budget

There is a maximum budget of £7,500 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:

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 10th September 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 Activity Plan Consultant roles.

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

Heidi El-Megrissi, Oxford Botanic Garden, Rose Lane, Oxford, OX1 4AZ. heidi.el-megrissi (at) obg.ox.ac.uk

