



The David Livingstone Trust Birthplace Project

Monitoring and Evaluation

INVITATION TO TENDER

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Le taic bhon
Chrannchur Nàiseanta
tro Mhaoin-Dualchais a' Chrannchuir

A. CONTACT DETAILS

Title of Project: Monitoring and Evaluation Framework

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B. THE BRIEF

1. Background

In July 2017 the David Livingstone Trust was awarded £6.1 million by the Heritage Lottery Fund (HLF), Historic Environment Scotland and the Scottish Government. The Activity Plan, which outlines how the Birthplace Project will engage with communities and audiences, is central to the Project. The Project will be on-going until 2019, when the museum is due to re-open. Further information available here <https://www.david-livingstone-trust.org/birthplace-project.html> and a more detailed summary of the project is in Appendix 1.

The aim of this tender is to engage a Consultant to deliver a two-stage evaluation report; training to build capability within our in-house team, and templates/methodologies for ongoing in-house evaluation. Explicitly, this latter evaluation framework is to be aligned with the Activity Plan, and in discussion with the Learning Manager, to ensure monitoring and evaluation is embedded within the 3-year project and beyond.

An outline of the Activity Plan is available on request to elena.trimarchi@dltrust.uk.

2. The evaluation context

The following information is extracted from the Birthplace Project HLF Stage 2 submission, indicating the ways in which we will evaluate the success of our project from the beginning and share the learning which will have taken place.

'Our Aim is to create a vibrant new visitor destination telling the story of the remarkable life and heritage of David Livingstone (1813-1873).

We will achieve this by meeting our seven Outcomes:

1. *David Livingstone – Heritage of a Scottish National Hero*
Create a museum which embeds the David Livingstone story and with a mission to inspire social justice and personal achievement.
2. *Building and Collection Heritage*
Shuttle Row and the Collection will be in better condition as a result of the conservation works and will thereafter be pro-actively maintained.
3. *People, Communities, Groups – learning, developing skills, volunteering time.*
Be a centre for research and deliver learning and public programmes to support community regeneration and international development.
4. *People, Communities, Groups – learning about the heritage of David Livingstone*
Reinvigorate the material legacy of David Livingstone by giving it a compelling purpose – setting Livingstone's contribution to science, exploration, faith, international development and humanitarianism within a contemporary context.
5. *People learning about David Livingstone and going on to do something extra*
Create a dynamic visitor experience where people can learn about and be inspired by Livingstone's story, his childhood home and our collection.
6. *Environmental Heritage – people and communities volunteer time*
Conserve and maintain our park/woodland introducing better management of the SSSI along the river Clyde.
7. *Heritage numbers – visitors, volunteers, trainees, employees*
Achieve: 18,000 paid visitors leading to 23,000 visits (with 27,000 footfall in the wider parkland); 40 volunteers with training; 30 trainee via capital works contract; 2 short-term and 7 long term FTE posts (revenue dependent).

We will measure this by successful implementation of all our Stage 2 plans. Explicitly through the proposed Business Plan and Activity Plan evaluations. The latter will include an end of project evaluation involving an amount of on-site face-to-face research, observational

analysis, consultations with partners and focus group work. For example, undertaking surveys with visitors, communities and groups; explore staff and volunteer staff excitement about visitor experience; school pupils and teachers engaged and happy with the experience; visitors compelled about the story and going to do something extra in their lives. We will share our learning on-line and in partnership forums.'

3. The Scope

Within the above context, the Trust is seeking to engage a Consultant to deliver a two-stage evaluation report; templates/methodologies for in-house evaluation; and training to build capability within our in-house team. We are seeking 5 components – A to E:

- A. The delivery of a two-stage evaluation report that will meet the end-of-project evaluation requirements of the HLF funded Birthplace Project. Requirements will include assisting the Birthplace Project team in identifying and setting baselines and evaluations for:
1. the Activity Plan elements of the Project which will be on-going throughout the Birthplace Project and completed in 2021
 2. a framework which will allow DLT to continue collecting the right data for the HLF evaluation questionnaires which are to be submitted 1, 5 and 10 years after opening.

The stage 1 report will be delivered to the HLF in the Summer 2019 to coincide with the completion of the building and fit-out works (together with the Activity Plan deliverables at that date); and with the final, stage 2 report submitted in 2021 upon delivery of the Activity Plan. This latter report being a detailed concluding Monitoring and Evaluation Report based on the requirements of the Heritage Lottery Fund, which follows the guidelines set out by the funder.

For information only - by Summer 2019 the Grade A Listed Building will be refurbished, together with the conservation of 20% of our internationally significant collection, as two fundamental key parts of the Birthplace Project. Full details of their delivery will form part of the reporting by the Design Team and does not form part of this brief.

- B. Training (either in person or through resources provided) to the Birthplace Project team who will be delivering aspects of the Activity Plan. Training should include:
- A tiered approach, to suit the needs of individuals delivering activities and to support the Learning Manager to monitor and implement the Activity Plan
 - Assisting the team in identifying the sources and research methods required to formulate a robust, on-going evaluation process
 - Providing evaluation and survey templates that cover all aspects of the implementation of the Activity Plan
 - Providing support, advice and resources for the evaluation of all activities, as outlined in the Activity Plan
- C. As a visitor attraction/museum, the following elements to be evaluated include:
- our Activity Plan's action plan which lists targets and measures of success against each activity. (A copy of our Activity Plan, including the action plan, will be provided to the successful consultant upon appointment)
 - visitor numbers and profiles (age, gender, ethnic background, socio-economic group, disability)
 - number of activities organised, number and profile of people attending
 - volunteer numbers and profiles
 - trainee/interim/student numbers and profiles

- online user numbers and profiles
- staff numbers
- project management matters, including:
 - a. highs and lows throughout planning and delivery; management issues inc. planning, staffing, timetable; lessons learnt
 - b. how the project has made a difference to our heritage;
 - c. how our audiences, volunteers and trainees have benefited from the project and the programmes under the Activity Plan;
 - d. what the impact of the project has been on DLT as an organisation.

D. Provide a gap analysis of existing and proposed material:

- Audit the data that DLT already has and cross check against the HLF's evaluation requirements;
- Identify gaps in previous data collection and put in place measures to start collecting the missing data. This should include both qualitative and quantitative data and will be led by the consultant in discussion with DLT staff
- Identify indicators that will help illustrate the difference that the project has made and the impact our Activity Plan has had on the people involved
- Develop an evaluation strategy, including programme, techniques and materials, that will be discussed with DLT prior to implementation
- Engage with potential visitors, audiences and stakeholders as well as DLT staff and volunteers, to test how well the desired project outcomes, as articulated in our HLF round 2 application, have been met
- Collate and analyse the data collected and draw conclusions, lessons learnt. DLT will support the consultant with their research, data collection and the delivery of evaluation activities. Given we are a very small team, the exact level of support will be agreed during start-up conversations, and how it will be utilised should form part of the subsequent evaluation strategy. However, this should not be relied upon when calculating your resource/cost.

E. Demonstrating where we have been successful – within the following context:

Success Measures	Targets
Increase the range of audiences	<ul style="list-style-type: none"> • Attract greater numbers from target audiences • High level of participation in activities programme • Increase in visitor satisfaction levels
Conserve and enhance the heritage	<ul style="list-style-type: none"> • Delivery of Collection Care Plan • Conservation and management of building and grounds • Effective new interpretation • Application to Recognition Scheme
Increase the range of volunteers	<ul style="list-style-type: none"> • Increase overall numbers of volunteers • Increase number of volunteer activities • Increase number of volunteer hours • Monitor % gender • Monitor % age groups
Improving skills through knowledge and training	<ul style="list-style-type: none"> • Increase numbers of volunteers trained • Increase number of staff trained • Monitor number of teachers participating in CPD • Numbers of interns and apprentices
Improving management and maintenance	<ul style="list-style-type: none"> • Effective DLT Executive Committee • Stakeholder Forum engaging fully with DLC • Successful achievement of 5-star Visitor Attraction Grading • Successful marketing

3. Proposal Information

Criteria

The criteria used to assess the proposals submitted are detailed below:

- Quality – 30% - This will include methodology and approach
- Experience – 30%
- Pricing – 30%
- Timescales – 10%

Please provide a detailed proposal by e-mail to elena.trimarchi@dltrust.uk.

- Your proposed methodology
- Your experience relevant to the work to be undertaken and CV showing the relevant experience and identifying who would be the main point of contact and lead team member
- A programme for the work including how many meetings with the DLT and Project Team you have allowed for and how many days work you have allowed for to complete the project tendered for
- Information on other time commitments for your team that might affect this project
- Two referees for similar work who can be contacted immediately
- A breakdown of your fee to indicate the cost of the key areas of the brief, including the cost of different research methodologies, total fees for services, including day rates, all expenses and VAT if applicable
- Day rates for all members of your proposed team
- A copy of your Professional Indemnity and Public Liability insurance cover
- Indication of third party, if you intend to sub-contract areas, and their credentials to be able to carry the works out

4. Experience

Required Experience

- Proven track record of managing and successfully delivering a similar Monitoring and Evaluation framework and final report, preferably in relation to a Heritage Lottery Funded project,
- Knowledge and experience of HLF Activity Plan evaluation.
- Knowledge and experience of current best practice in learning and engagement and visitor studies within museums.

Other Requirements

- Consultants will be required to provide at least two examples that demonstrate that they have the relevant experience to deliver the services as described in the brief
- Bidders are required to confirm whether they intend to sub-contract and if so for what proportion of the contract
- Bidders should provide details and credentials of the main person employed who would be responsible for the delivery

5. Timescales

Start: March 2018

End: October 2020

The deadline for receipt of proposals will be Wednesday 7th March 2018 at 12 noon and should be sent to elena.trimarchi@dltrust.uk. The contract will be awarded on or before 12th March 2018 and an inception meeting held by 23rd March 2018. There will be an interim review. Please note the timescales may be subject to change in agreement with the appointed consultant. There will be no renewal on completion of project. Tenders should also provide a day rate should works exceed projected timescales.

6. Costs

Please provide a full breakdown of your proposed costs for the work required, including a breakdown of daily rates and allocation based on the key activities detailed in this brief. If additional consultants are required to undertake this study it is expected that they will be employed by the lead consultant in accordance with the scope of this brief. Costs should also incorporate any expenses incurred by the appointed consultant. An interview process may take place.

INVITATION TO TENDER

Consultants are invited to submit a proposal on the basis outlined above.

APPENDIX 1 – FURTHER BACKGROUND

DAVID LIVINGSTONE TRUST & BIRTHPLACE PROJECT

1. ORGANISATIONAL BACKGROUND

1. The David Livingstone Trust

The David Livingstone Trust and the constitutional responsibility of the charity is to hold and maintain a National Memorial and Museum on the site of Livingstone's birth, which should be made available to the public, providing an interesting, educational and enjoyable cultural experience. The Trust achieves this by:

1. Preserving in good physical order the present buildings which contain the birthplace of David Livingstone and the immediate environment.
2. Bringing together, holding, adequately housing, conserving and documenting a Collection of specimens being of historical, artistic, scientific and ethnographical association with the life and times of David Livingstone, Blantyre, Scotland and the countries associated with his explorations.
3. Stimulating public interest in the Centre as a focal point of education and of interest in the life and times of David Livingstone.
4. Displaying and publicising the Collection for the public benefit.
5. Promoting and assisting in the collating and recording of the historical, ethnological, archaeological, biological, geological or other related information appropriate to the purpose of the Museum.

2. The David Livingstone Birthplace Project

When the Birthplace project is complete, a vibrant new visitor destination telling the story of the remarkable life and heritage of David Livingstone will have been created. This story sets Scotland in a global context and presents a compelling universal example of what each of us can achieve – and what we must offer the world. Given the importance of our Collection we intend to become a centre for research; and deliver learning and public programmes to support schools, community regeneration and international partnerships. The Centre will be recognised as a hub for disseminating ongoing academic research into David Livingstone with links to a wide range of audiences in the UK and Africa.

The overall budget allocation of 6.1 million GBP (funded by Heritage Lottery Fund, Historic Environment Scotland, Scottish Government and the David Livingstone Trust) will allow the refurbishment of the historic buildings, redesign of the exhibition and conservation of key pieces of the 2,700-piece Collection with associated improved storage facilities. The intent is to refurbish Shuttle Row and the African Pavilions to create a high-quality museum and visitor centre, with improved facilities enabling us to deliver a memorable visitor experience rich with opportunities for learning and enjoyment.

3. Heritage Context

The remarkable life and heritage of David Livingstone (1813 – 1873) is a powerful story that sets Scotland in a global context and presents a compelling universal example of what each of us can achieve – and what we have to offer the world. David Livingstone (1813 – 1873) was born in Blantyre Mill, a poor millworker's son. Inspired by the ideas of the Scottish Enlightenment, by faith and by the mill's commitment to workers education, he would go on to become a world-renowned explorer, medical missionary and anti-slavery campaigner. Hailed as 'Africa's First Freedom Fighter', Livingstone remains a positive example of international solidarity and his story presents Scottish history, culture and learning within a truly global context.

The David Livingstone Centre is located on the site of the former Blantyre Mill. Established as the Scottish National Memorial to David Livingstone in 1929, it comprises Shuttle Row,

the millworkers' tenement block in which David Livingstone was born and raised; an important, accredited museum Collection; and a visitor centre, all set in 11 hectares of parkland along the banks of the River Clyde. Blantyre Mill was built in 1785 and was a major industrial location on the Clyde. It was contemporary with New Lanark, founded on similar enlightened principles with a strong focus on the improvement and education of its large workforce. The mill continued to operate until 1904 and by the 1920s Shuttle Row had degenerated into a slum. However, the mill's history as the birthplace of David Livingstone inspired a campaign by local people to preserve it as a lasting monument. Following a general mobilisation of the Sunday Schools of Scotland, the Shuttle Row buildings were saved and refurbished as the heart of the Scottish National Memorial to David Livingstone. The A-Listed Shuttle Row comprises an 18th century tenement and terrace, outbuildings and a forecourt, describing the former communal courtyard and laundry area. The main building, a rare surviving example of early industrial housing, houses the Livingstone birthplace museum over three floors. It includes the restored single room where Livingstone was born and a sequence of galleries containing interpreted displays. The adjoining buildings contain offices, stores and meeting space.

2. THE COLLECTION

1. Overview of Collection

The Livingstone birthplace 2,700 piece Collection is unique and internationally significant. At its core are many of the items that were saved and returned to Britain by Livingstone's African companions, alongside material donated by Livingstone's friends, family and neighbours. As such they represent a remarkable, international effort by community members across a considerable stretch of time to create a material record of Livingstone. This Collection continues to be subject to important new research. Another important part of the Collections is the Blantyre Works Library, a unique surviving early worker's education resource and an important educational foundation for Livingstone's remarkable journey. In summary, it has:

- **Historic Value:** The Collection at the Centre has exceptional historic value, being both a comprehensive biographical record of David Livingstone's life and associative in nature, encapsulating many of the broader historical themes, patterns and topics associated with his life, work and legacy.
- **Scientific Value:** There is currently substantial scientific research interest in the Collection at the Centre, with opportunities for research potential to be developed in the future, especially with the application of modern technology.
- **Artistic Value:** The Collection has considerable to exceptional aesthetic value presented through the methods and techniques used to create the objects preserved within the ethnography / world cultures Collection, the items used and created within Blantyre Cotton Works, as well as the exhibition material that was to follow whilst developing the Scottish National Memorial to David Livingstone. The Pilkington-Jackson Tableaux are unique both in terms of experimental nature of their execution and style.
- **Social Value:** The Collection has exceptional social, spiritual and communal significance. This can be identified through its interpretative capacity, the ways in which it can be used to engage with communities and the potential it has to make a positive difference to people's lives.

2. Collection Categories

Our Collection consists of many different types of artefacts ranging from African ethnographic material to slavery artefacts gathered by Livingstone as evidence of the barbaric East African slave trade. We also hold a range of Livingstone's personal belongings including medicinal, navigational and missionary equipment. We have a number of items

that hold deeply intimate connections with Livingstone including his clothing (the red shirt he wore when he met Stanley), Mary Livingstone's wedding ring, and Livingstone's bodily relics taken during his post-mortem.

The contents of the Museum can currently be categorised into three broad categories:

- The David Livingstone Birthplace Collection, including Blantyre Works library (2700 items)
- The David Livingstone personal Collection (approx. 500 items)
- The David Livingstone exhibition material, including the historic Pilkington-Jackson dioramas, illustrating key points in DL's story (approx. 30 original artworks commissioned for the new museum in the late 1920s/early 1930s)

3. The three key Collection highlights

i. Blantyre Works Library

Blantyre Cotton Works, as with many other industrial workplaces across Scotland, provided access to free education for the impoverished working classes. The Blantyre Works Library is a rare example of an early 19th century industrial workplace library and it provides a unique insight to the enlightened environment of Livingstone's upbringing. Books on nature, science, theology and medicine reveal the intellectual ideas that helped shape the young Livingstone's independent mind

ii. Livingstone's Manuscripts

We have 112 documents of Livingstone's writings including his letters, field diaries, maps and journals. We have been working with a range of partners on the academic project Livingstone Online to digitise these manuscripts in order to make them publicly accessible. As part of this project we have been able to undertake spectral imaging to reveal previously illegible writings. Livingstone's 1871 field diary is of particular interest both due to its form and content. Due to lack of supplies, Livingstone resorted to using old newspapers and ink made from natural dyes, which faded over time.

iii. Charles Pilkington Jackson Artworks

For the establishment of the Livingstone Memorial in 1929, British sculptor Charles Pilkington Jackson, was commissioned to create various artworks. This included a series of eight tableaux depicting Livingstone's spiritual journey through Africa.

4. Collection Storage

At present the objects and artefacts are stored in small, overcrowded storage areas, in display areas and several larger items are stored elsewhere on-site. Long term exposure to light and unstable environments has resulted in some damage to collection items and several objects require remedial work.

A CAT survey of the collection was carried out by Conservators in 2016 which has identified approximately 18% (circa 470 artefacts) of the Collection requires conservation under the programme.

On completion of the Birthplace project building refurbishment works the collection will be returned to a new, secure and environmentally stable storage area.