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Heritage
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iniva (Institute of International Visual Arts)

Living Legacies: collaboration, community & radicality

Brief for Consultancy Services

Evaluation Planner (Consultancy Role)

Consultancy Brief

Consultant Role: Evaluation Planner to support the Development Phase period of a National Lottery Heritage Fund project, *Living Legacies: collaboration, community & radicality*.

Location: Remote working or at iniva's premises at 16 John Islip Street in Pimlico with the ability to travel to London for meetings and workshops

Reporting to: Living Legacies Project Manager

Contract period: October 2024 – June 2025

1. Executive Summary

iniva (Institute of International Visual Arts) seeks to engage an experienced and professional freelance Evaluation Planner to prepare an Evaluation Plan by May 2025 in advance of a National Lottery Heritage Fund 2nd Round (Delivery Phase) funding application, which is scheduled for submission in August 2025.

The appointed consultant will be required to build on outlined proposals to develop an Evaluation Plan and evaluation frameworks for the project in liaison with iniva staff, the Living Legacies project team, and iniva's external project partners.

This brief provides the context, requirements and process for procurement of the consultancy services to carry out these tasks.

2. About iniva (Institute of International Visual Arts)

iniva is a visual arts organisation which grew out of the 1980s Black Arts Movement, an era that was marked by an explosion of creative expression. Since 1994 iniva's programme has supported artists, writers and cultural producers through a range of activity including research, exhibition making, publishing and commissioning of new works.

iniva is also home to the Stuart Hall Library, a public space acting as a critical and creative hub, holding a collection of over 10,000 publications, including artist books, monographs, exhibition catalogues, journals and zines. iniva's Archive collections are housed in the Stuart Hall Library. Its extensive mixed media collection captures the experimental foundation of iniva's pre-history, legacies of Black artist movements, individuals from diasporic backgrounds exploring identity through creative practice and iniva's 30-year history supporting its artistic communities.

The Library is an active site for research and programming for users including national and international students, academics, intergenerational and multidisciplinary artists, cultural practitioners, youth and the general public.

3. About the Living Legacies project

Living Legacies: collaboration, community and radicality will transform community engagement with the heritage of iniva's Archive. Over a four-year Delivery Phase (2026-2030), the project aims to open-up the rich visual legacies of diasporic artists who have shaped the British Black Artists Movement and welcome a broader national and local audiences to reveal the stories of radical artistic practice from Global Majority, African, Asian, & Caribbean diaspora perspectives.

With funding from The National Lottery Heritage Fund, we aim to create a 'living archive', a term coined by our founding Chair Professor Stuart Hall to reinterpret and open the archive to future new communities. The project aims to utilise inclusive archiving practices to capture the voices of esteemed practitioners who are part of the legacy such as Hans Ulrich Obrist, Sunil Gupta and Joy Gregory and enliven the content through a shared language and engagement activities. Engagement with the archive collections will focus on new audiences of young people aged 16-25 and older adults (65+) in our local boroughs of Westminster, Lambeth and Southwark, where wellbeing needs are greatest.

By the end of the project, we aspire to have transformed physical, digital and demographic access to our heritage with audiences of over 31,000 engaging with our rich heritage in 2030. Over 4 years we will engage 50,000 people with 3 key collections from our archive.

In March 2024, iniva has been awarded £149,500 by the National Lottery Heritage Fund for a one-year Development Phase (2024-2025). During the Development Phase consultants will be commissioned to help us critically test our assumptions around current and new audiences, engagement possibilities with our archive collections, best practice around archival processes and digital resource capabilities for the Delivery Phase.

The Delivery Phase of the project will be led by a specialist project team including a Project Manager, Project Archivist, Community Engagement Producer and an Archive Curator to achieve the following key outputs:

- An accessible archive catalogue including selected digitised material.
- An inclusive volunteering, training and placement programme.
- Recorded oral histories with practitioners in the archive made public through a podcast series.
- A public programme of exhibitions, screenings, reading groups and talks at the Stuart Hall Library and in partnership with national institutions including Institute of Contemporary Arts, Serpentine, Southbank Centre and Hayward Touring.
- A community programme including an annual Community Archive Group and local archive workshop programme specifically for 16-25 year olds and 65+ years old, delivered in the community.
- A teachers' programme for teachers in training on London PGCE courses using archival material to inform teaching practices.
- Digital resources including exhibition and research guides, teachers lesson plans, and archive building and accessing resources created by our communities.

We will also aspire to connect our archive catalogue to other national and international archives, to ensure our heritage enhances a wider picture of Black and International Art heritage. We will create a dedicated communications campaign to ensure national reach of the project resources and to evaluate the success of the project and to create legacy we will include independent evaluation. The total budget sort from the National Lottery Heritage Fund to create this legacy through this project is in the range of £1-1.5million.

4. Consultancy Brief

Overview

We seek to commission an experienced Evaluation Planner to work on the Development Phase of the project. The main task(s) of the consultant will be to develop, create and deliver a Development Phase Evaluation Report and an Evaluation Plan to be utilised in the Delivery Phase of the Living Legacies project. The Evaluation Plan must be in the appropriate format in line with the National Lottery Heritage Fund requirements for submission to a second-round Delivery Phase funding application to the National Lottery Heritage Fund.

Development Phase Team

The successfully appointed Evaluation Planner will work closely with the following:

- Living Legacies Project Team
 - Project Manager
 - Activity Planner
 - Interpretation Planner
 - Copyright & Archive Consultant
- iniva's staff team

The Evaluation Plan will build on work in the Development Phase undertaken by the Project Manager, Activity Planner and Interpretation Planner to outline an evaluation framework to monitor and evaluate outputs and outcomes of the National Lottery Heritage Fund's funded Living Legacies project.

The Evaluation Plan will include:

- A Theory of Change for the project.
- Methodology for data and evidence collection.
- Framework with key performance indicators and measures for monitoring and assessing progress.
- A schedule with milestones, reflection and review points, and reporting deadlines.
- Outline of evaluative tools and software needed to fulfil the evaluation and costs.
- Outline responsibilities and tasks across the project team to embed evaluation in the delivery of project.
- Provision for any training needed for the team in carrying out evaluation.
- Advice on appropriate documentation and reporting for the Delivery Phase project.

Objectives of the Evaluation Plan

The Evaluation Planner must ensure that the Evaluation Plan meets the following objectives:

- To ensure data and information about project outcomes and outputs are captured in a timely and accurate manner.
- To ensure that the methodology used for data and evidence collection is appropriate and tailored to the audiences and participant needs.
- The methodology used for data and evidence collection is appropriate for the resources available and the capacity of the project team.
- Information being collected relates to the aims and objectives of the project enabling meaningful context and feedback to iniva and the project team.
- Evaluation is embedded as part of the project delivery from the start.
- The evaluation undertaken is relevant and useful for developing the project as it progresses and enables iniva's to build legacy post-funding from the National Lottery Heritage Fund.

Scope of works

The Evaluation Planner will:

- a) Create an Evaluation Report for the Development Phase of the project ready for iniva's Development Phase Review in May 2025.
- b) Create an overarching Evaluation Plan and framework ready for iniva's Development Phase Review in May 2025, conducting revisions before a final version is submitted in June 2025. The final Evaluation Plan must be in the appropriate format for a second-round Delivery Phase funding application to the National Lottery Heritage Fund.
- c) Work with the Development Phase project team to identify key performance indicators to support an integrated evaluation methodology.
- d) Establish a detailed timeline for the Evaluation process, providing dates for phasing and completion of key activities and milestones.
- e) Liaise with the Project Manager to ensure the Evaluation Plan is integrated into other project plans and budget.
- f) Abide by iniva's safeguarding policy and national data protection guidelines, ensuring evaluation methods are appropriate when working with vulnerable groups.
- g) Attend the National Lottery Heritage Project meetings as required, including Sub-Committee visits or reviews.

Outputs

iniva will require the Consultant to include the following outputs:

- a) A Theory of Change for the project.
- b) A fully researched overarching Evaluation Plan and framework for the full 4-year Delivery Phase of the project.
- a) A completed Evaluation Report for the Development Phase of the project.
- b) A suite of tools especially designed for each element of the project being evaluated.
- c) An electronic copy of the final documents in PDF and Word formats, with appendices detailing the full scope of research and work.
- d) Electronic copies of source material.
- e) Electronic copies of any presentations relating to the Evaluation Plan.

5. Copyright and Confidentiality

The Consultant will assign the copyright of all plans, reports and outputs to iniva for use in connection with its operations. The Consultant must clear the copyright for any third-party images, illustrations or other material used.

The Evaluation Plan will be a confidential document and may therefore not be distributed without prior consent from iniva.

6. Tender Process and Next Steps

Tender Process Timeline

10 July 2024	Tender documentation issued
10 July – 5 August 2024	Tenderers' Questions
19 August 2024, 5pm	Tender Bid Deadline
Week beginning 9 September 2024	Tender Evaluation and Presentations
Week beginning 16 September 2024	Tender Announcement

Tender Requirements

The tender should include the following:

- a) Proposed methodology, programme and timescales.
- b) A CV detailing relevant experience of evaluation planning, especially for National Lottery Heritage Fund funded projects.
- c) Specific challenges and learning from previous National Lottery Heritage Fund evaluation planning work and how you would apply that to iniva's programme.
- d) A fixed-price quote proving a cost breakdown together with confirmation of any expenses including daily rates, and VAT registration if applicable.
- e) Confirmation that the consultant has the capacity to complete the work within the timescale indicated above.
- f) Insurance details. Consultants who do not hold the required level of insurance cover may indicate the cost of obtaining this additional cover and this will be added to the total cost of the quoted price for comparison purposes.
- g) The contact details of two references.

How to Submit

The tender documentation should be marked '**Living Legacies Evaluation Planner Consultant tender**' in PDF format and send to Tavian Hunter, Project Manager at thunter@iniva.org no later than **19 August 2024, 5pm**. Any documentation arriving after this time will not be accepted.

Short-listed candidates will be invited to interview and will be asked to make a presentation of their proposal.

Enquiries

Any enquires about the tender process and general questions should be submitted to info@iniva.org no later than **5 August 2024, 5pm**. Questions submitted after this time will not be answered.

7. Tender evaluation/ weighting

The chosen consultancy will be selected based on:

- a) Proven experience of similar work (20%)
- b) Methodology assessment of key issues to be addressed, how objectives will be met (40%)
- c) Interview (20%)
- d) Tender price (20%)

8. Budget

There is an indicative budget for this work of £10,000 (ex.VAT) inclusive of all expenses. A fixed fee proposal is required as stated in the tender requirement (section 6 above). Consultants must make iniva aware from the outset if they are VAT registered.

9. Supplementary Information

The following documents are included in the tender pack to assist with the application:

- Summary of iniva's National Lottery Heritage Fund Development and Delivery Phase application