

St Mary's Stockport: Brief for Evaluation Consultant

Location: Stockport, Greater Manchester

Project Value: £2.2 million (£1.7m construction)

1. Church Overview

St Mary's in the Marketplace, Stockport is a Grade I listed, pre-Reformation church and the oldest building in Stockport, within the Market and Underbanks Conservation Area. The chancel and oratory date from 1320, with roof timbers dendro-dated to 1017. The nave and tower were rebuilt in 1817.

St. Mary's now has an aspiration to develop the church into a heritage centre (whilst remaining an active place of Christian worship) with activities aimed at a wide range of ages and interests; and repairs, maintenance and improvements to the building.

We currently host Stockport Heritage Trust. Our ambition is to significantly increase access to heritage by also providing tower tours, self-guided tours, a heritage escape room and a professional cafe or restaurant. We would like to develop a programme of activities that increase engagement with the heritage of the church and the local area for people who might not normally get involved. This will include working in partnership with new and existing partners such as Stockarts, Eat Good West and local schools to increase use of the church for gigs, food festivals and educational tours.

2. Project Overview

We are delighted to have secured funding from the National Lottery Heritage Fund to support a development stage project which will set out costs and proposals for us to take forward to delivery stage. At delivery stage this project will deliver:

- Urgent repairs to roof, gutters, stonework, windows, plasterwork and floor tiles.
- New facilities including heating, entranceways and safe tower access.
- New interpretation within and outside the church to tell the story of the building and people connected to it through heritage escape rooms, a tower tour, self-guided QR code tours, and other potential ideas suggested within budget and capacity.
- A programme of activities that will engage a wide range of people with the heritage.
- Commercial and income generating activities and events that will help to secure financial resilience and ongoing maintenance of the building.
- Potentially establishment of a new organisation to run the activities beyond the life of the project.

3. Evaluation Consultant

A consultant is required with demonstrable experience of working to National Lottery Heritage Fund (NLHF) Development and Delivery Phase requirements for evaluation and preparation of evaluation evidence and reports for Development and Delivery Phase requirements. The consultant must have experience of designing and implementing proportionate evaluation approaches in volunteer-dependent organisations, including methods that can be practically used by staff and volunteers. The consultant will also ideally have experience of working in historic and active places of worship, active heritage buildings or comparable community heritage settings and of working with volunteers.

The consultant must have demonstrable experience of collaborative working and effective partnering within multidisciplinary project teams, including integrating evaluation requirements with activity planning, interpretation, business planning, capital delivery and project management. The consultant must have a clear understanding of NLHF's priorities for Saving Heritage; Protecting the Environment; Inclusion, Access and Participation; and Organisational Sustainability.

Governance: the consultant will report to Rev. Chris Blunt (client) and Peter McIlhagger of PMC Squared (Project Manager) and will attend regular on line project team meetings (monthly). The consultant should plan for 4 of these meetings to be in person on site. These meetings will be alongside the Interpretation Planning and Historic Research consultant, Business Planner, Activity Planner and Architect/Design Team.

Safeguarding/ Compliance: given this role's work with schools, volunteers and vulnerable or marginalised groups, the consultant must agree to work within the PCC's safeguarding policy or submit their own for approval. The consultant must be comfortable addressing issues related to research ethics, informed consent, confidentiality and GDPR.

The role will include:

- **Part one (Development Phase Evaluation):** Monitor and evaluate the development phase work across engagement and capital elements of the project, including pilot activities, consultation, and process. Deliver a Development Phase Evaluation Report assessing lessons learned to accompany the Delivery Phase submission.
- **Part two (Delivery Phase Evaluation Framework):** Work with the project team to construct a Theory of Change / Logic Model. Plan the evaluation in delivery including design of an Evaluation Framework to measure participation, economic impact, learning, and outcomes aligned with NLHF's *Heritage 2033* priorities. Work closely with activity planner to tie this in to activities.

The budget for this role is £7,400 at Development Stage and £14,400 at Delivery Stage.

This fee is inclusive of all expenses and disbursements. The consultant must hold Professional Indemnity insurance (minimum £1m) and Public Liability insurance (minimum £2m). The budget excludes VAT.

4. Deliverables for this role

The consultant will:

Review existing policies and procedures

Review existing evaluation evidence, monitoring arrangements, relevant policies, previous research and current operational data, in conjunction with the Activity Plan Consultant, to establish the existing evidence base and identify gaps relevant to the project evaluation.

Baseline data

Identify the baseline evidence required to evaluate the project; assess the quality and completeness of existing data; identify gaps; and collect or specify additional baseline data required before Delivery Phase activities commence.

Theory of Change

Facilitate the development and testing of a Theory of Change Model with the wider project team, clearly linking project activities, outputs, outcomes and intended longer-term impacts.

Evaluation Framework

Develop a practical Evaluation Framework setting out evaluation questions, outcomes, indicators, baseline measures, data sources, qualitative and quantitative methods, responsibilities, frequency of data collection, methods of analysis and reporting arrangements.

Economic impact, wellbeing and learning

Measures may include, wellbeing, learning and other relevant outcomes where these arise from the project's Theory of Change, agreed outcomes and NLHF priorities.

Pilot activities

Design appropriate evaluation methods for pilot activities, support staff and the wider Consultant team with evidence collection, analyse the findings and make recommendations to inform the design of Delivery Phase activities.

Existing activities

Evaluate relevant existing activities, including the café, Stockport Heritage Trust activities and food events, to establish current audiences, participation, visitor experience and other relevant baseline evidence.

Formative evaluation of interpretation

Work with the Interpretation Planner to design and undertake proportionate formative evaluation of proposed digital, QR and physical interpretation, and analyse the findings to inform subsequent development.

Process and progress evaluation

Evaluate project process and progress throughout the Development Phase, identifying what is working well, what is not, barriers and enabling factors, unintended consequences and lessons that should inform the Delivery Phase.

Progress reports

Provide concise written evaluation updates at agreed project milestones and attend Heritage Project Group meetings where evaluation input is required.

Development Phase Evaluation Report

Produce a draft and final Development Phase Evaluation Report setting out evidence gathered,

findings, successes, weaknesses, lessons learned, evidence limitations and recommendations for the Delivery Phase.

Delivery Phase Evaluation Framework

Finalise the Delivery Phase Evaluation Framework for submission as part of the NLHF Delivery Phase Application.

Practical evaluation tools

Develop practical and proportionate evaluation tools and templates required to implement the framework, including appropriate participant, visitor and qualitative feedback mechanisms.

Capacity building and handover

Ensure that staff and volunteers understand their evaluation responsibilities and provide appropriate guidance, training and handover so that the Evaluation Framework can be implemented effectively during the Delivery Phase.

5. Essential Skills & Experience

Demonstrable recent experience of leading evaluation on National Lottery Heritage Fund-funded projects, including Development and/or Delivery Phase evaluation, preparation of evaluation frameworks and reports, and practical engagement with NLHF monitoring and reporting requirements. Evidence should include at least three relevant commissions undertaken within the last five years, including projects of comparable size and complexity.

Demonstrable expertise in Theory of Change Model development, evaluation framework design, baseline development, mixed qualitative and quantitative methods, data analysis, process evaluation and outcome/impact evaluation within heritage or similar settings.

Demonstrable experience of designing and undertaking inclusive evaluation with communities that have historically been under-represented in heritage participation, including people experiencing social or economic disadvantage, using methods that enable meaningful participation and minimise barriers to engagement.

Demonstrable experience of effective collaboration and partnership working within multidisciplinary project teams, with the ability to integrate evaluation across different workstreams while providing constructive challenge and independent professional judgement.

Demonstrable experience of designing and implementing proportionate evaluation approaches within volunteer-led or volunteer-dependent organisations, including methods and tools that can be used effectively by staff and volunteers.

Strong analytical and report writing skills, with demonstrable ability to synthesise qualitative and quantitative evidence, identify significant findings and produce clear, evidence-based conclusions and recommendations for funders and project teams.

Demonstrable understanding of appropriate research ethics, informed consent, confidentiality, safeguarding and UK data protection requirements relevant to community evaluation.

Experience of developing proportionate monitoring and evaluation systems, tools and guidance that can be embedded within the project delivery and sustained by the client organisation.

6. Timeline

The project team are currently working towards a May 2027 submission of the application to the National Lottery Heritage Fund.

The consultant must also allow for a NLHF mid-term review.

Key milestones (dates to be confirmed unless stated):

- Appointment of consultant team – Sept/ October 2026
- Baseline Data & Theory of Change Workshop – Oct–Dec 2026
- Draft Evaluation Framework – for mid-term review (date to be confirmed by NLHF)
- Pilot Activity Evaluation & Final Draft Report – March 2027
- NLHF Delivery Phase submission – May 2027

7. Evaluation Criteria

Applications will be assessed against:

- Understanding of the brief and proposed approach
- Relevant experience and track record (case studies)
- Team skills, capacity and value for money

8. Submission

By Friday 2nd October, interested consultants should submit an application to include: CVs, relevant experience and a methodology for the work. Methodologies should be no more than 6 sides of A4 and CVs no more than 2 sides of A4 per person. Interviews, if required, will be held by video call on Monday 5th or Tuesday 6th October

Applications should be sent to: c.blunt@stockportparish.net and copied to peter@pmcsquared.co.uk and stephen.roche@pmcsquared.co.uk

It is expected that those intending to bid for the work should at least call Rev. Chris Blunt (07503 706906), The Rector of Stockport and Brinnington, to discuss the project prior to submission. Subject to existing commitments, visits to see St. Mary's and discuss face to face are also encouraged.

To assist, if requested, the PCC will supply digital (pdf) copies of:

- The other briefs being sent out that make up the full package of work; and
- Our initial Expression of Interest for the project.