



# LEANCHOIL

## **Invitation To Quote for preparation of an Evaluation Plan in support of applications to The National Lottery Heritage Fund and other funders.**

### **Background**

#### **Leancoil Project – Growing Wellbeing from Heritage**

The Leancoil Project was borne out of a desire by the community of the Forres area to save, conserve, and repurpose the former Leancoil hospital which was closed by NHS Grampian in 2018. To achieve this, Leancoil Trust is undertaking a community asset transfer (CAT) of the hospital site and is working with partners to deliver its vision of a community health and wellbeing centre, veterans' activity centre, and supported living accommodation.

The CAT process is nearing completion, with conditional missives concluded, and it is anticipated that transfer of ownership will be achieved in early 2025. There will then follow a 2-year construction period with the opening of the Leancoil Centre scheduled for Early 2027.

The Trust has spent the last 4 years building relationships with key partners (Hanover Scotland, Erskine Veterans' Charity, and Scottish Ambulance Service). It is working with a wide range of organisations to develop a robust and sustainable business model for Leancoil to ensure its future as a heritage community asset. We are embarking on a capital fundraising programme to raise £4.5 million for the renovation with applications to The National Lottery Heritage Enterprise Fund and other large funders being submitted in the next 12 months.

#### **Leancoil Trust (The Trust)**

The Trust was established in 2020 and is a company limited by guarantee with charitable status. There is a board of 9 volunteer Trustees who all live in the Forres area and are passionate about saving Leancoil and finding it a sustainable future. They are supported in their work by a Project Development Officer (PDO) and Project Co-Ordinator (Technical) (PCT).

## Objectives

**As a result of a successful application to The National Lottery Heritage Fund, Leanchoil Trust has been awarded funding for the Development Stage (First Round) under the Heritage Enterprise programme.**

## Scope of Services – General Requirements

Quotations are invited for a consultant/s to prepare an evaluation plan as part of the project Development phase. This document will form part of the (Second Round) application to The National Lottery Heritage Fund under the Heritage Enterprise grant programme.

## Scope of Services - Specific requirements

The appointed consultant will be required to:

- Design an evaluation plan for the scheme, working with the Project Team (led by the Project Coordinator (Technical)), to include.
  - Developing a logic model
  - Identifying the data that needs to be captured to meet funder requirements in reporting against outcomes, cross-referencing The National Lottery Heritage Fund's four strategic principles and completing evaluation reports.
- Complete a gap analysis of existing data to inform the above and agree benchmark data.
- Produce an evaluation plan to capture the total data requirement, which should detail the following:
  - What data is to be captured.
  - Who will be responsible for capturing the data.
  - Methods to capture the data.
  - Production/provision of data capturing tools for use by the scheme project team.
  - Record keeping
  - Data analysis methodology and who is responsible for this.

In the development of the plan, the consultant will:

- Work closely with the Project Coordinator (Technical) and liaise with and support the Community Heritage Activities plan consultant/s on pilot activity feedback and evaluation.
- Liaise with the Project Development officer, Leanchoil Trust team, and the wider Leanchoil partnership group.

The successful consultant will be able to draw on the support of the Project Coordinator (Technical), Project Development Officer, and Trustees in accessing information on the proposed scheme.

## Resources

The appointed consultant will be provided with the following documents:

- Outline Community Heritage Activities Plan
- Map of the site
- Development Phase application
- Access to background information from the project

## Fees and Costs

Quotes to include the following:

- Lump sum figure for the services outlined in the General Requirements and Specific Services above. This is to include all expenses (including travel).
- A breakdown of the fee proposal by days and day rate/s, and expenses.

## Additional Information

### Copyrights & Intellectual property rights

Rights to use, publish and reproduce the information contained in the applications and supporting documents, either in part or whole, will be held by Leancoil Trust

### Insurance

The successful consultant/s will be required to have as a minimum, the following insurance cover for any one occurrence or series of occurrences arising from one event:

Professional Indemnity £1,000,000

Public Liability £1,000,000

The consultant will be asked to exhibit their PL and PI document schedules before the commencement of the work.

### Contact details:

The contact details for this Invitation to Quote:

Jana Hutt, Leancoil Trust Trustee

Email: [jana@leancoiltrust.org](mailto:jana@leancoiltrust.org)



*Leancoil – Growing Wellbeing from Heritage project is made possible with The National Lottery Heritage Fund. Thanks to National Lottery players, we have been able to progress plans to save Leancoil Hospital for the community.*

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## Leanchoil Trust

### Invitation to Quote for an Evaluation Planner – Selection and Assessment criteria

The responses will be subject to a quality/price evaluation of 70/30%

#### Quality – 70%

The quality part will cover the following areas –Selection and Assessment Criteria

| Evaluation Criteria  | Weighting                  |
|--|----------------------------|
| <b>Selection criteria</b>  |                            |
| Evidence of previous relevant experience in preparing an evaluation plan in support of The National Lottery Heritage Fund applications.                | pass/fail                  |
| Evidence of relevant experience of working on built and/or cultural heritage projects  | pass/fail                  |
| Form of submission - all information provided  | pass/fail                  |
|  |                            |
| <b>Award criteria weighting (dependent on type of contract)</b>  | <b>70/30</b> quality/price |
|  |                            |
| <b>Quality criteria weighting</b>  |                            |
| Demonstrable experience in preparing evaluation plans.   | 60%                        |
| An understanding of the requirements of The National Lottery Heritage Fund (including The National Lottery Heritage Fund’s four strategic principles). | 30%                        |
| Evidence of knowledge of the local area, stakeholders, and community.  | 10%                        |

All criteria except for price/cost, shall be scored using the following scale of awarding marks between 0 and 4:

|          |   |
|----------|---|
| <b>4</b> | The response is very detailed and excellent in all areas. The response addresses the requirement with clear details demonstrating how the project outputs will be met in many or exceeded in all areas. |
| <b>3</b> | The response is detailed and good in all areas. The response addresses the requirement with clear details demonstrating how the project outputs will be met in many, but not all, areas.                |
| <b>2</b> | The response is sufficiently detailed and acceptable. The response addresses some elements of the requirement and demonstrates how some of the project outputs will be met.                             |
| <b>1</b> | The response is generally poor. The response addresses some elements of the requirement but does not demonstrate an ability to meet many of the project outputs.  |
| <b>0</b> | Nil or inadequate response. Fails to demonstrate an ability to meet any of the requirements.  |

## Pricing – 30%

The response should:

- provide a staged and overall price for the work, exclusive of VAT;
- specify the hourly rates for each person to be involved in each stage of the work;
- state the estimated number of hours each person would spend on the work;
- estimate the out-of-pocket expenses and disbursements to be charged, along with an explanation of what makes up this cost.

In scoring the weighting on the pricing aspects, this will be scored on the basis that the lowest bid will score the maximum 30 points – other bids will be scored in relation to how their overall price compares with the lowest bid.

## Award

On completion of the evaluation process the Trust will award the project to the successful bidder who has the highest combined score for quality and price. LT reserves the right to accept other than the lowest priced tender or to accept no tender at all.



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