## Evaluation Consultant – Historic Environment Forum and the Heritage Sector Resilience Plan

**Overview**

The Historic Environment Forum (’the Forum’) brings together senior members of staff from more than twenty public and non-government bodies to work collaboratively on strategic matters for the historic environment sector in England. The work of the Forum is managed and run by a small HEF team, funded by Historic England and hosted by Heritage Alliance, reporting to the HEF Steering Group.

The Forum carries out a range of activities to coordinate sector initiatives, and to encourage and support research, conservation, presentation, enjoyment and use of the historic environment in England. It is also a useful information-sharing platform between its members, aimed at enabling timely decisions to best support the sector.

Over the past years, the Forum has coordinated the post-pandemic sector response (Heritage Recovery Plan, Heritage Sector Resilience Plan, coordinated messaging in the campaign #HeritageNow), post-Brexit sector response, and has facilitated conversations around environmental sustainability in the sector (report ‘Heritage Responds’, a task group devoted to Green Skills in Heritage). More information on the Forum’s current and past activities can be found on the HEF website: [www.historicenvironmentforum.org.uk](http://www.historicenvironmentforum.org.uk).

Historic England is committed to funding HEF until at least 2027/28, with the delivery of the following products:

* Heritage Sector Resilience Plan 2025-28 (see below for details).
* Production of annual Historic Environment Overview and support for Heritage Counts in collaboration with Historic England.
* Coordinating agenda and sector contributions in the Heritage Council, a key mechanism to connect the sector with DCMS and other relevant Government departments.
* Task Groups related products.
* The Forum also has the agility and responsiveness, thanks to its dedicated HEF team, to take on additional ad hoc work when appropriate.

Heritage Sector Resilience Plan 2025-28 (HSRP2)

The Historic Environment Forum’s  [Heritage Sector Resilience Plan](https://historicenvironmentforum.org.uk/wp-content/uploads/2022/06/HeritageSectorResiliencePlan_def.pdf) was first published in June 2022, with financial support from Historic England. It set out a variety of priority actions for collaborative activity across the historic environment sector in England grouped under five themes: skills; strong governance, business models & capacity; climate change; diversity & inclusion; and embedding heritage in wider public policy. Good progress has been achieved in completing the priority actions, to such extent that it is now timely to produce an **updated version of the Plan**. A new HEF Task Group has been established in 2024 to lead the work on the development of a second edition of the Plan. A variety of events are being held to engage HEF members and other relevant partners in the development of an updated plan (HSRP2) which will look ahead over the coming decade with short-term actions identified for the next 2-3 years. HEF’s aim is to publish the updated Plan in late May 2025.

The new Plan considers four ‘cornerstones of resilience’:

* **Physical resilience** (to ensure heritage assets exist in the future - likely to include climate change, planning reform, etc.)
* **Workforce and institutional resilience** (areas like skills, governance, remuneration, volunteering)
* **Financial resilience** (areas like finance and the funding landscape)
* **Relevance / utility** (heritage assets and the heritage sector will only be resilient if society cares about it)

**HSRP2 will act as a strategic framework for the Forum’s activities** and replace the current HEF Strategic Framework.The HEF team will coordinate the delivery of the actions identified in HSRP2 and will deliver many of them through the established working methods of the Forum (task groups, topic groups, HEF assembly).

**Scope of evaluation**

The evaluation will cover:

1. The Forum’s core activities and operations (2025-2028), delivered by the HEF team employed by the Heritage Alliance, and their impact on key stakeholders
2. Implementation and impact of HSRP2 actions delivered by the HEF team

The consultant(s) will have access to the monitoring & evaluation frameworks developed by the HEF team since 2020, which covered HEF’s core activities and operations. The current logic model can be accessed [here](https://docs.google.com/document/d/19TbsGvH3-j5YDwv-JLroVPb3hriEMwEK/edit?usp=sharing&ouid=115087010660824806360&rtpof=true&sd=true).

**Evaluation objectives**

The evaluation has two key lines of inquiry:

External Impact Assessment

* Measure success and impact of the HSRP2 actions delivered by the Forum.
* Evaluate the HEF team’s effectiveness in enabling outcomes defined by Historic England (Working together; Finding common ground; Developing a more co-ordinated, more efficient and resilient sector; Creating positive change through collaboration in the historic environment sector in England; Developing the Forum to be better equipped to support, maintain and champion the historic environment sector in the long term; Promoting and celebrating collaboration).

Internal Process Review

* Evaluate the efficiency and effectiveness of the HEF team, employed by the Heritage Alliance
* Monitor and assess other forms of support provided by the Heritage Alliance to HEF, as agreed between Historic England and the Heritage Alliance
* Evaluate effectiveness of Task Groups set up to deliver HSRP activities
* Identify opportunities for innovation and improvement.

The purpose of the findings produced is to enhance the ongoing delivery of the HSRP2, support decision-making for the HEF Steering Group, and demonstrate public value to Historic England, as well as equip the HEF Team and THA with the necessary ‘Critical Friend’ to ensure that HEF remains a highly responsive and impactful mechanism for the historic environment sector.

As part of this work the consultant is expected to:

* Develop an evaluation framework for the two lines of enquiry. The consultant is expected to run a workshop to gather HEF members’ intelligence on sector resilience at HEF Foresight Day (in person in London on 10th June 2025).
* Liaise regularly with the HEF team.
* Produce quarterly ‘snapshots’/dashboard with key data, to be shared with the HEF Steering Group, the wider Forum and Historic England.
* Produce two short annual interim reports, at the end of 2025/26 and 2026/27.
* Produce one end-of-project report (in March 2028).

**Experience required**

The successful consultant(s) will have:

* A deep understanding of the heritage sector landscape
* Proven track record evaluating collaborative/multi-stakeholder programmes
* Strong analytical and reporting skills
* Strong interpersonal skills

The consultant(s) must also have the capacity to complete the work within the timeframe outlined below.

**Approach**

It is highly recommended that the consultant(s) make use of the ethnographic approach to monitor and evaluate internal processes. HEF works mainly remotely, but the consultant(s) might be required to attend up to 3 in-person meetings annually (most of them in London).

Beside the ethnographic approach, other approaches can be considered especially to evaluate external impact.

**How to respond to the tender**

The following information must be included with your tender:

* A brief **outline of your approach** for the work (no more than two A4 pages).
* **Budget** breakdown.
* **Experience**: summary details of at least two previous projects relevant to the current one in terms of scope, size and context; and brief CV(s) of relevant staff to be employed in performing this contract.
* **Referees**: details of two referees.

**Timescale**

* Tender published: w/c 14 April 2025
* Submission deadline: 6 May 2025
* Interviews expected: w/c 19 May 2025
* Appointment of consultant(s): w/c 26 May 2025
* Foresight Day: 10 June 2025, in person in London
* Evaluation framework set up: end of Q1 2025/26
* Regular quarterly reporting ‘snapshots’
* Annual interim reports: end of Q4 2025/26, end of Q4 2026/27
* The final report must be delivered by end of Q4 2027/28

**Budget**

The budget available for this piece of work is £20,000 over the course of three years, VAT and expenses included, split as follows:

* £7,500 in year 2025/26
* £6,000 in year 2026/27
* £6,500 in year 2027/28

Payments will be made in quarterly instalments.

**Selection Criteria**

* Understanding of brief (10%)
* Proposed approach (35%)
* Experience and expertise (25%)
* Budget allocation and Value for money (30%)

**Contact details**

Questions and applications can be submitted to Francesca Benetti, HEF Task Group Manager: heftask2@historicenvironmentforum.org.uk.