



**BRIEF**

**Evaluation Consultant**

**Region: Wales**

**Job Type: Contract**

**Fee: £10,000 inclusive of all disbursements but excluding VAT (a further £25,000 net is available in the project's Delivery Phase subject to grant award)**

**Location: Gregynog, Powys, Wales, SY16 3PL**

**Timescale: March 2026 – March 2027**

Gregynog Trust wishes to appoint an Evaluation Consultant to fulfil the monitoring and evaluation element of The National Lottery Heritage Fund supported project *Raise the Roof*.

<https://gregynog.org>

**Deadline for applications: 1200 noon, 26 March 2026**

**Proposed interview date (online): 31 March/ 1 April 2026**

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## **1.0 Background**

### About the Gregynog Trust

The Gregynog Trust was incorporated on 15th November 2016 as Private Limited Company Number 10479711 and granted Charitable Status by the Charity Commission on 30th November 2018 - registered Charity Number 1180943.

Gwasg Gregynog Fine Press although housed at Gregynog, is currently a separate Limited Company. The Gregynog Trust is in negotiation to take full ownership of it in 2026. The Gregynog Music Festival is a separate limited company and not part of the Trust.

### About Gregynog

Gregynog is a 750acre estate which includes the Grade II\* listed Hall, early concrete structures and William Emes and later Dame Sylvia Crowe landscaped gardens, along with a large Site of Special Scientific Interest (SSSI), designated nature reserve and arboretum, Gwgia reservoir, a lake, farmland and buildings. Gregynog's ancient sessile oak woodlands form part of the National Forest of Wales.

Gregynog's history reaches back centuries and is perhaps best known for its 20th Century occupants, sisters Gwendoline and Margaret Davies. These two remarkable philanthropists, social entrepreneurs and renowned art collectors played a vital role in Welsh cultural, educational and social history and made Gregynog their home.

Gregynog Trust is committed to the care, refurbishment and enhancement of this important historic house and working estate. We have so far raised c£800K to contribute to our nature conservation, refurbishment of our Walled Garden and access to our historic gardens. The Trust has begun work on the Heritage Fund supported development phase of its £5m Raise the Roof Campaign – which will see a major step forward in transforming the Hall and the special fine and applied art collections within.

We welcome visitors, to host and originate stimulating conferences and debate, develop new activities and to enjoy a restorative environment. We value our history and in the spirit of the vision extolled by its former owners, Gregynog will continue to play an important role at the heart of Wales and the wider economic, social and cultural life of Wales for future generations. Our care and refurbishment of Gregynog will see us share its magic and create Wales' most welcoming home for nature, learning and the arts.

## **2.0 Raise the Roof! Project**

Raise the Roof is a ~£5 million capital project. The capital works programme focusses on the urgent and critical repair of the Gregynog Hall roof which is nearing the end of its useful life. Associated works will repair or replace rainwater goods, fascias and bargeboards, and undertake essential groundworks to improve drainage. The project also gives the opportunity to make adaptations for climate change and improve accessibility infrastructure. Repairing the roof is the first step in Restoring the Hall, securing this magical place for future generations and unlocking its wider potential.

Alongside the capital works, the project invites people to engage with the remarkable story of the Davies Sisters at their former home, through their collections, as well as within its outstanding natural surroundings. The wider project will undertake organisational development work to support the Trust's long-term sustainability; establish a reinvigorated music and festival programme and a series of vibrant arts and nature focussed events; build and strengthen partnerships with aligned organisations and the local community; develop an interpretation strategy for the estate; and develop and deliver a volunteering programme to support the sustainability of the Trust.

Funding has been secured from The National Lottery Heritage Fund, Architectural Heritage Fund, Pilgrim Trust and Historic Houses Association to support the project's £961,591 Development Phase and we are now building our project team.

**Architect and Design Team Lead** Butress <https://butress.net/>

**Project Management** Lode Heritage <https://www.lodeheritage.com/>

We are currently advertising for an Activity Plan Consultant, Business Planner, Evaluation Consultant, Fundraising Consultant and Interpretation Consultant.

### **3.0 Scope of services**

#### **3.1 In the Development Phase**

Reporting to the Gregynog Trust Project Steering Group through the Project Manager, the Evaluation Consultant will work closely with the project team, Gregynog Trust's staff and volunteers to:

- Establish a baseline for Gregynog Trust's current activity
- Develop an evaluation methodology for the Development Phase of the project
- Develop and provide tools/methods and appropriate training for use in collecting and recording data, including methodology for collecting and reporting data in Welsh and English
- Provide iterative feedback on evaluation findings during the Development Phase so that learning can be applied on a 'live' basis as the project develops
- Write a final report covering all aspects of the Development Phase and identifying areas of learning for the Delivery Phase of the project for submission with the Development Phase final report
- Develop a framework for evaluating the Delivery Phase of the project, taking account of the lessons learned in Development Phase and the development of project plans, for inclusion with the project's Delivery Phase application
- Contribute to The National Lottery Heritage Fund Development Phase review and progress meetings as requested

It is anticipated that if the project is successful in obtaining funding for its Delivery Phase, the Evaluation Consultant would be re-contracted to support the project's Delivery Phase.

#### **3.2 In the Delivery Phase the evaluator would:**

- Support data gathering according to the Delivery Phase evaluation framework, assuming some data is gathered directly by the Evaluation Consultant and some with the support of project staff and volunteers
- Analyse the data
- Produce an interim report of findings to allow iterative improvement in the delivery of the project's Activity Plan

- Produce a final Evaluation Report which meets Heritage Fund requirements and allows the Gregynog Trust to further embed project learning into future activities

3.3 The evaluation frameworks for both phases of the project will specify evaluation methods appropriate to critically evaluate project aims and outcomes but sympathetic to the audiences the project seeks to engage. It is expected the Evaluation Consultant will use a range of quantitative and qualitative methods including participatory and creative approaches as necessary. Consultants should pay attention to Tenderers should demonstrate how they will take account of the Welsh language and the practical and cultural considerations of delivering evaluation in a bilingual and plurilingual context, including the accessibility of evaluation methods, materials, and engagement approaches. Budget has been ringfenced in the project separate to this brief to support engagement with Welsh speakers.

3.4 The Evaluation Consultant should use a theory of change approach, as set out by Heritage Fund guidance <https://www.heritagefund.org.uk/funding/good-practice-guidance/evaluation> and ensure evaluation aligns with its Heritage 2033 strategy and measures our project's performance against the current [Investment Principles](#).

#### **4.0 Other conditions of appointment**

4.1 The consultant is expected to attend monthly project meetings (hybrid online/ onsite)

4.2 In accepting this commission, the consultant agrees to licence the copyright on all materials produced in support of the project to Gregynog Trust and its project partners. Gregynog Trust shall be entitled to use said materials as they see fit and without limitation.

4.3 All work produced must support both the Charity and the funder's requirements. All work should be shared with partners as directed by the Charity.

4.4 The appointment will be subject to a break clause on completion of the Development Phase, such that, in the event our Delivery Phase application is unsuccessful, the commission will not be taken any further.

4.5 The Consultant is expected to comply with The National Lottery Heritage Fund's [Acknowledgement Guidance](#)

4.6 This is a freelance contract; consultants remain responsible for their own tax and national insurance liabilities.

4.7 Payment will be in instalments, a payment schedule will be agreed on appointment

## 5.0 Experience, knowledge and skills

We are looking for evaluation consultants who:

- Have experience of developing and delivering evaluation frameworks for major projects majority funded by The National Lottery Heritage Fund
- Have experience of developing and delivering evaluation frameworks for projects in a comparable heritage setting
- Have experience of delivering projects in Wales, demonstrating an understanding of our operational context, including working in bilingual settings
- Have knowledge of evaluation best practice and a wide range of quantitative and qualitative evaluation methods
- Have knowledge of our operational context
- Have excellent interpersonal skills and can work with people from a wide range of backgrounds
- Can balance our wish to use our project evaluation for continuous improvement with the commitments we have made to our funders
- The ability to speak and write Welsh is desirable but not essential for this appointment

## 6.0 Timetable

Return of tenders:	1200 noon, 26 March 2026
Interviews (online):	31 March/ 1 April 2026
Commencement of contract:	March 2026
Development phase review (anticipated)	December 2026
Delivery Phase application (anticipated)	February 2027
Completion of contract:	March 2027

Project timetables are indicative and are subject to change during the project's Development Phase.

## 7.0 Application Process

7.1 For all enquiries and to respond to tender please contact:

Dale Copley, Project Manager

hello@lodeheritage.com

07841870445

The following information is required as part of the submission:

- Full supplier details including details of the public liability, employers' liability and professional indemnity insurance.
- A brief methodology (no more than 2 sides of A4 in total) describing the Consultant's approach to the commission.
- A fee proposal for the work, including a cost breakdown of fees and allocation of time for each team member and expected days of work. The fee should include expenses and make clear if VAT is payable.
- Schedule of day rate(s) that would apply if additional work were to be instructed beyond the scope of this brief
- Cvs of key staff members to work on the project.
- Examples of 3 comparable projects undertaken in the last five years
- Two references

7.2 Gregynog Trust reserves the right to undertake interviews and/or clarification meetings with some or all the tendering consultants, should it be considered necessary. The assessment may be moderated based on clarification meetings, should they be required.

7.3 Clarification queries may also be raised on the above basis.

## 8.0 Assessment Criteria

8.1 Submissions received will be assessed on a quality/price basis as described below:

**Quality (70% weighted): Price (30% weighted)**

## Quality criteria

Proposed methodology meets scope of services and shows awareness of operational context, including working with Welsh language and bi-lingual settings. Methodology and approach to commission (max 2 sides)	30%
The consultancy has experience of developing and delivering evaluation frameworks for projects funded by The National Lottery Heritage Fund, in heritage settings and for projects of comparable scope and scale. Examples of comparable projects undertaken in the last 5 years & references.	15%
The proposed team members have experience of developing and delivering evaluation frameworks for projects funded by The National Lottery Heritage Fund and working with comparable clients. Cvs.	15%
Value for money. Fee proposal.	10%

INADEQUATE	Completely fails to meet required standards or does not provide a proposal.	0
POOR	Proposal significantly fails to meet the required standards, contains significant shortcomings and/or is inconsistent with other proposals.	1
LESS THAN SATISFACTORY	Proposal falls short of achieving required standards in a number of identifiable respects and leads the evaluator to make assumptions.	2
SATISFACTORY	Proposal meets the required standards.	3
GOOD	Proposal meets the required standards in all material respects and demonstrates a good understanding of the requirements.	4
EXCELLENT	Proposal meets the required standard in all material respects and exceeds some or all the major requirements.	5

## Cost

The lowest cost will receive 30%. The cost of each submission will then receive a proportion of the 30% on a pro rata basis. Therefore, if the lowest cost is £8,000 and another cost received is £12,000, the £8,000 quotation will receive 30% and the £12,000 quotation, being 1.5x the lowest, will receive 20% ( $12,000 / 8000 = 1.5$ , $30 / 1.5 = 20$ )	30%
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8.2 Gregynog Trust reserves the right not to accept the lowest priced or any other tender received.

**ENDS**