

SECTION 7

MONITORING AND EVALUATION

Introduction

The *Moor than meets the eye* Landscape Partnership Scheme will seek to award a contract to deliver a monitoring and evaluation plan for the *Moor than meets the eye* Landscape Partnership Scheme. This is an important element of the scheme and will have to adhere to HLF guidance.

Background

The Scheme encapsulates a comprehensive series of projects and activities within the south east corner of Dartmoor National Park funded through Heritage Lottery Fund. The total cash value of the Scheme is £3,900,000.

The Partnership is made up of Natural England, Devon County Council, English Heritage, The Forestry Commission, Dartmoor Partnership, Dartmoor Farmers Association, Dartmoor Commoners Council, South West Lakes Trust, the Duchy of Cornwall and the Dartmoor Preservation Association and the Woodland Trust. Dartmoor National Park Authority is the lead partner for the project.

The Partnership will work with local people, stakeholders and communities to deliver a range of projects and activities to enhance the wildlife and cultural heritage of the area and improve access and understanding.

Heritage Lottery Fund is providing financial support to the Scheme to deliver a range of activities and projects between 2014 and 2019, which have been defined in this Landscape Conservation Action Plan. The Plan contains detail about all projects and activities to be supported including budgets, outputs, timeframes and outcomes.

A number of staff are being employed to deliver the Scheme including a Project Manager who will undertake ongoing monitoring of the scheme and report to the HLF on a quarterly basis.

There is a direct and close relationship with the Partnership of organisations who have a responsibility and role to play to ensure the success of the Scheme and quality delivery of all projects and activities.

The information and data to be collected for Monitoring and subsequent Evaluation has been identified. Key delivery partners and the project manager will be responsible for ensuring a clear monitoring programme. The outputs, outcomes and future legacy have been identified for each project in the LCAP, ongoing collection and collation of this information will provide a cumulative record of the scheme overall.

It is important to identify the differences between the projects and the Scheme.

The Scheme overall provides the framework and support behind the projects and will need to be evaluated for its overall impact, benefit, successes, short-comings and legacy for the future.

It will be vital to look at a range of factors: technical aspects such as delivery to time, financial accounting, timesheets etc. and impact measurements to consider the impact of the whole scheme on heritage, people and communities and specifically whether the objectives of the scheme are being delivered.

All individual projects will have established predefined targets and indicators and the success of achieving these will be of positive benefit to the overall impact of the Scheme. The projects will be evaluated both by the individual project leaders but also by the staff of the Landscape Partnership Scheme and the Management Board based on the monitoring data collected.

Monitoring

The ongoing monitoring of progress and collation of information will be undertaken by the Staff Team and partner officers responsible for the delivery of specific projects. It is expected that the successful consultant will utilise direct monitoring data from the Scheme.

Evaluation will not be successful unless the Monitoring process is clearly defined. Monitoring is a process of recording the progress of projects against specific targets, indicators and milestones. Throughout the delivery of a project, qualitative data may also be collected to provide materials for Evaluation but it is essential that this is collected with an agreed methodology across all projects and the scheme as a whole.

Therefore there will be significant levels of data collection required from the projects by the Landscape Partnership Scheme Staff. This information, along with that gathered and collated by the successful consultant can then be interpreted to provide means for the Evaluation of impacts and successes of a project. The types of data for collection fall into two categories and each of these categories of data will need to be collected for both Scheme and projects, summarised in the following tables.

QUANTITATIVE DATA	
Scheme	Projects
<p>Timeline A delivery plan has been included in the LCAP, progress against the milestones and timeline will be reported to the Project Board quarterly</p>	<p>Each project has a planned delivery date which will be used to monitor progress</p>
<p>Budget A spend profile has been included in the LCAP and will be updated annually. The Project Board will review progress against projected spend on a quarterly basis</p>	<p>The budget set for projects is a maximum amount based on detailed projections of costs of delivery</p>

QUANTITATIVE DATA	
Scheme	Projects
<p>Risk The Project Manager will write regular progress reports providing a narrative on all successes and issues relating to the aspects of the Scheme.</p> <p>Emergency exception reports will be prepared if risks become of critical significance or represent a significant deviation of anticipated progress within +/-10% of budget forecast</p> <p>Minutes of meetings will also be kept to track attendance, decisions and progress of specific aspects</p>	<p>Project leaders will prepare progress reports including quantitative and qualitative information. Where risks are evident project delivery partners will alert the Project Manager</p>
<p>Press Releases All publicity relating to the LPS will be recorded and included in the Dartmoor Archive</p>	<p>Projects will be expected to issue press releases</p>
<p>Photographic Evidence A photographic record will be compiled and built upon throughout the life of the Partnership by the Staff Team. This will be a visual record of projects and activities run directly by the Scheme, including, where possible, before, during and after shots.</p>	<p>All projects will be required to submit photos as evidence of delivery including before, during and after shots. This requirement applies for all projects within the Scheme.</p>
<p>Indicators The scheme will be the conduit for the collation of indicators. These will be assessed by the Project Board.</p>	<p>All projects will have indicators included in the LCAP pro-formas</p>
<p>Volunteer and staff time sheets A template form will be used by all project delivery partners to record staff and volunteer time</p>	<p>All Volunteer and Staff time when in engaged with any aspect of the Scheme will be recorded</p>

QUALITATIVE DATA	
Scheme	Project
<p>Satisfaction surveys and feedback forms These will be required to be issued and collected for all events and public participation projects and any other public events. An agreed format is required</p>	<p>Where applicable, all projects will be required to collect satisfaction surveys and feedback forms at the point of delivery</p>

QUANTITATIVE DATA	
Scheme	Projects
Visitor Survey An ongoing visitor survey will be distributed across the area. Again an agreed format is required	It would be good if all sites across the scheme area with visitor facilities are included
Engagement with communities Independent evaluation of impact on communities is needed	
Social Networking and web media? tbc	
Annual Celebration Event This event will be organised by the project team with invites to all stakeholders likely to have been affected by the scheme. The event will look at achievements and allow people to discuss how the projects and scheme as a whole has impacted on them	

Outputs required from the contract

The Landscape Partnership Scheme is operating over a 5 year time period, one contract will be offered for evaluation to allow for three points of contact

The first stage of work will be within 6 months of the project start and will have four elements:

- To assess the proposed indicators (as listed in the LCAP) to ensure they will provide adequate evidence for the evaluation
- To formulise standard survey and feedback forms
- To provide mentoring and support for Project and delivery staff to ensure monitoring and evaluation is fully embedded in the scheme
- To provide a methodology for evaluating the overall impact of the scheme on people and communities

The second stage of the work will be required at mid-point through the LP scheme and will require the following:

- A review of methodologies
- Evaluation of progress against projected outputs and outcomes for the scheme as a whole .
- Evaluation of the impact of the whole schemes on people and communities
- Consideration of the effectiveness of the Partnership

At the end of this stage a report will be required which will evaluate progress towards delivery of outputs and outcomes for the scheme as a whole taking into account monitoring information provided by delivery partners. The report will outline areas of particular success and areas of concern and recommend actions to improve delivery and/or monitoring and evaluation through the second half of the scheme delivery.

The final part of the contract will be 6 months before the end of the scheme and will require a final report in the format suggested by HLF guidance. It will verify the impact and benefits to the area, the value of the projects, activities and Staff provided and recommend important points to maintain or continue beyond the life of the Scheme.

Milestones

1. Development of agreed techniques and tools - to be completed by November 2014
2. Delivery of mentoring and training for project and delivery staff – to be completed by December 2014
3. Mid-term review report – to be completed by July 2017
4. Final Evaluation report – to be completed by July 2019

Selection of Contractor

The contract will be awarded on the basis of confidence in the contractor achieving a high standard of work, completing the work in accordance with the agreed methodology and delivering good value for money.

Selection criteria will include:

- methodology – approach to task; data validation and checking process
- evidence of successful delivery of similar evaluation work for HLF projects
- resilience – ability to deliver in the event of unplanned unavailability of key staff etc
- value for money

Criteria will be scored in line with the following:

Criteria	Potential score	Weighting	Max score
Methodology	1-5	X2	10
Evidence of successful delivery of comparable work	1-5	X5	25
Resilience – ability to deliver in the event of unplanned unavailability of key staff etc	1-5	X4	20
Value for money	1-5	X3	15
TOTAL			70