

King's Theatre, Edinburgh

Brief for monitoring and evaluation consultant

1. King's Theatre, Edinburgh

The Grade A listed King's Theatre opened in 1906 and stands on a prominent site in Edinburgh's Tollcross area. It is one of Scotland's oldest and most loved theatres. Some 200,000 audience members a year flock to the King's for a mix of high culture and popular entertainment. The King's is home to Scotland's biggest Panto production, the annual Gang Show and each year plays a pivotal role in hosting the Edinburgh International Festival.

This ambitious, £25 million redevelopment project will result in the repair, enhancement and expansion of one of Scotland's oldest working theatres. Through this project we will transform and optimise the King's theatre for the next 50 years. We will modernise the venue creating a transformed theatregoing experience whilst preserving and showcasing the heritage.

Capital works will include modernisation of front and back of house areas, making them suitable for 21st century audience and performer needs. Back stage will see current areas of risk addressed. Works will transform accessibility challenges throughout the building making it equitable for all users. All redevelopment activities, through a conservation plan and management and maintenance plan, will ensure heritage is preserved and restored.

2. Background

The ambitious project to redevelop the King's aims to increase footfall to the Theatre by 66%, inject a one-off £19.5m into the Scottish economy and £9m into the Edinburgh Economy, generate an additional £7.9m into Edinburgh's economy every year and vastly improve the building's environmental performance.

As part of the redevelopment project Capital Theatres aims to collate and present the social and cultural heritage of the theatre. A programme of activities is planned to engage around 25,000 people with the heritage that surrounds the King's, impacting wellbeing, confidence and learning.

3. The Project

Capital Theatres seeks to appoint an experienced and creative evaluation consultant to lead on the monitoring and evaluation of a National Lottery Heritage funded project to measure against the outcomes contained with the application. This will need to be measured alongside the wider objectives and outcomes of the project and those contained within other funding applications.

As part of the evaluation of King's redevelopment project we require the evaluation consultant to;

- Analyse existing data of the King's for the past two years
- Write the evaluation framework, logic model and evaluation plan with input from advisory panels and project staff and consultants
- Put the systems in place for effective and organised data collation
- Implement and manage the collection of baseline data
- Write the annual survey to collect data missing from our current collection mechanisms
- Work with the project team to put effective data collection mechanisms in place in order to evaluate the wider project and Activity Plan
- Work with Marketing to amend and update current data collection
- Organise, run and manage focus groups, post event feedback sessions and participant interviews to measure impact (made up of attenders/non-attenders and people with access requirements/local communities that surround the King's)
- Analyse findings at each data milestone, provide insights, make recommendations
- Write the end of stage and mid-stage evaluation reports for the project (Development Phase, Delivery Phase and Post Delivery Phase two years after opening)

The evaluation methods proposed for the King's should be developed within the context of the required outcomes for heritage and people set out by National Lottery Heritage Fund as well as the Project Plan, the Activity Plan, Environment Strategy, Economic Impact Study, Widening Access Strategy and the Business Plan, the overarching aim of which is: **To save the King's, transforming it for the enjoyment and inspiration of generations to come.**

The objectives of the project are to:

1. Modernise, preserve and showcase the heritage
2. Transform access, to achieve a quality and equitable experience for everyone.
3. Re-energise the artistic programme by attracting a greater breadth and the best available local, national and international productions
4. Create a transformed, highly enjoyable, theatregoing and visitor experience.
5. Create an enabling environment to foster lifelong cultural engagement

During the development stage the consultant will develop a full logic model and evaluation framework, building upon the evaluation approach and model in Appendix I and II. They will work with Capital Theatres to set out the required outcomes and outputs of our key stakeholders alongside the organisation's pre-defined outcomes to be achieved throughout the project lifetime. Monitoring and evaluation will cover the following areas (but not limited to):

- The built heritage of the King's and the surrounding area of Tollcross
- Success of activity plan in achieving the outcomes and outputs that it sets out to reach, including:
 - Volunteers and volunteer time contributed
 - Success of heritage visitor attraction
 - Impact on participants including their wellbeing and attitudes

- Numbers and diversity of our audiences including improvements to access
- Environmental impact
- Business plan performance
- Funding and economic impact
- Enjoyment of our users and audiences

4. Timescales

February 2020	Kick off meeting
February	Review preliminary evaluation plan put in place by Learning & Participation team for activity delivered Sept 2018 – January 2020 Review existing data collection methods
February - April 2020	Review heritage fund application and outcomes Analyse existing data from the last two years Work with capital theatres to develop an evaluation logic model Develop the evaluation framework Develop and implement the evaluation systems and protocols Write the surveys, forms and questions
April – May 2019	Collection of baseline data Piloting data evaluation measures and gaining feedback from participants
June 2019	Evaluation methods to be fully adopted by Capital Theatres- Ongoing data collection
December 2020	End of Development Stage DATA MILESTONE Finalise Evaluation approach document for HLF application Write End of Development Phase Report
May 2021 – August 2025	Delivery phase of the project – Ongoing data collection Annual surveys Lesson logs
August 2023	King's Opens DATA MILESTONE Interviews, Informal discussion Groups Data analysis and mid-delivery stage report
August 2025	Project Complete DATA MILESTONE
August 2025 - February 2026	Writing Final project evaluation report including lesson learning, key outcomes, findings and successes.

5. Methodology

We require the following information to be submitted with your application.

- CV, including relevant previous experience of evaluating £1m+ National Lottery Heritage Fund projects
- Details of how the tenderer intends to manage the project, including a project plan and timeline, and a resource schedule

- Overall costs (including daily rates and VAT as applicable), please price each part of the contract separately
- Contact details (phone and email) for two references
- GDPR data protection compliance statement

All tender submissions will be evaluated to identify the consultant who will deliver best value - balancing quality and price, with a significant emphasis on the quality (Quality 70%: Price 30%).

6. Theatre Management & Operation

The King's Theatre is currently owned by the City of Edinburgh Council. The building is leased to Capital Theatres on a 25-year lease. It is a receiving house which with a year-round programme of visiting productions.

7. Project Team Co-ordination

The appointed evaluation consultant will work closely with Capital Theatre's Learning and Participation team, the Director of Operations and the Marketing team to put the necessary systems data gathering mechanisms on place, and to collate the required data ongoing.

8. Outputs

The main outputs will be;

1. Collection of baseline data,
2. Evaluation logic model and framework, setting up systems and protocol, producing annual surveys and leading on focus groups, discussion groups and interviews
3. Data collation and analysis
4. End of stages (Development and Delivery) and mid-stage project reports

9. Fee Proposal

This is a two-part contract; the second part is dependent on a successful National Lottery Heritage Fund stage 2 pass. The initial commission has a budget of £25,000 has been allowed, excluding VAT, for consultant fees and activities for work delivered during the Development stage, up to the point of the Round 2 submissions.

Part 2 of the commission has a budget of £75,000 has been allowed, excluding VAT for evaluating the delivery phase. Part 2 of the commission will be confirmed upon a successful stage 2 submission to National Lottery Heritage Fund, (December 2020 for a March 2021 decision).

This fee covers the costs for consultant fees, evaluation report writing, surveys, materials, venues and hospitality (e.g. for focus groups), incentives, travel for participants and two energy surveys to analyse environment performance.

The fee proposal should include any sub-consultancy fees deemed necessary by the consultants. It should be fully inclusive of all professional expenses.

It should be noted that all information, reports etc. produced by consultant will become and remain the copyright of the Client.

10. Timescales

Issue Brief	-	30 th December 2019
Tenders returned	-	Monday 27th January 9am
Interviews	-	Monday 3 February
Kick off meeting	-	February 2020

11. Reporting

The consultant will report to Brian Loudon, Director of Operations

11. Tender returns

Tender submissions should be returned to: Brian Loudon, Director of Operations, Festival Theatre 13/29 Nicolson Street, Edinburgh, EH8 9FT

The tender return date is Monday 27th January at 9am.

Appendix I - Outline monitoring evaluation approach

Appendix II - Outline evaluation model

Appendix I - Outline Monitoring and Evaluation Approach

During the development stage we will produce a full logic model and evaluation framework, building upon the evaluation model in Appendix IV, setting out the required outcomes and outputs of our key stakeholders alongside the organisation's pre-defined outcomes to be achieved throughout the project lifetime. For each outcome for heritage, people and communities we will set up an evaluation criteria pre, during and post activity. Monitoring and evaluation will cover the following areas:

- The built heritage of the King's and the surrounding area of Tollcross
- Success of activity plan in achieving the outcomes that it sets out to reach
- Numbers and diversity of our audiences including improvements to access
- Environmental impact
- Volunteers and volunteer time contributed to the project
- Success of the heritage visitor attraction
- Business plan performance
- Funding and economic impact
- Enjoyment of our users and audiences

We will engage an evaluation consultant to put effective measures in place for staff to gather the required data ongoing. The consultant will collate and analyse the findings, send out annual surveys, organise focus groups and informal discussion groups and prepare the end of project report. The data milestones will be (with exception of Environmental Impact where baseline data will be gathered during the development phase and reported against 2 years after opening): The end of the Development Phase; Once the King's opens; Three years after opening. Targets for data collection throughout the duration of the project will assess the impact and change the project has made in the short, medium and long term.

At the end of the Development Phase we will measure the National Lottery Heritage Fund outcomes that make a difference to Heritage and People. A secondary aim of this is to help inform the Delivery Stage of our Heritage Engagement Activity Plan.

At the end of the project in 2026 we will share the data collected, and analysis from the evaluation with National Lottery Heritage Fund, project partners, funders and other cultural venues, as appropriate.

Baseline Data Collection

We already collect the following data:

- Post-performance and event surveys, annual customer surveys gather;
 - 1) information on some of the demographic indicators of our audience such as: gender, age, ethnic origin, postcode, employment status, access and additional needs and
 - 2) information on the quality, impact and enjoyment of our audiences including customer service and facilities.
- Numbers of visitors and frequency of visits.
- The King's environmental impact is measured through: Gas, water and electricity usage; levels of wastage and recycling; audience journeys to the theatre.

In order to measure and analyse the change achieved by this project we will identify a baseline point. Baseline data will be collected during the Development Phase and will be captured using:

- *Box office data* – this is a robust source of information that covers where attenders come from, their demographic (i.e. Gender, Age, Ethnic origin and Postcode, Employment Status and Disability status) and the frequency of attendance at the King's Theatre.
- *Survey data* - gathers information on the quality, impact and enjoyment of our audiences including customer service, ease of travel around the building and facilities like bars and toilets, quality of the sightlines, seats and temperature.
- *Survey data* – a newly designed survey to monitor, for example: pride in local area, opinions on the appearance of the building, improvement of the Tollcross area, knowledge of the King's heritage. We will survey local businesses about the effect the project had on their business. A series of measures will be used throughout the project in order to track change.
- *Informal discussion groups data* - with specific segments of population we will measure how people feel about the King's Theatre and its heritage, and the effect that participating in engagement activities during the project has had on their wellbeing, their likelihood of volunteering, involvement in other heritage or community projects or even a career in heritage. We will aim to actively involve groups of people who don't currently engage with our offer to broaden the demographic that we are engaging. It will also be useful to document barriers to attending such as physical access, financial, social or psychological barriers.
- *Digital engagement data* - this will collect data on clicks, shares and length of stays on the, campaign site, heritage stories and social media.
- An energy survey - this will be commissioned for the King's that measures and analyses efficiency of heating and cooling, hot water, electricity, lighting and utility consumption it will analyse areas and levels of wastage to report against once the King's re-opens.
- Water, gas and energy usage data
- Recycling and landfill data - collected through Changeworks.
- *Audience journey data*- we monitor the distance and modes of travel of our audiences
- *Numbers of volunteers and volunteer time*
- *Skills and training audit* - in heritage and areas to deliver the project successfully
- *Local business data* - collected through local economy analysis and surveys
- *An Access Audit* - carried out by an access focus group
- *Touring company data* - we will collate the feedback on the quality of the King's performance spaces and facilities and the reasons why a company may/or may not choose to bring their performance to the King's

Lifetime of the Project Data Collection

During the project we will collect the above data using box office data, post-show and event surveys, annual survey specifically on the King's and heritage, informal discussion groups, interviews, focus groups, observations, case studies, participant diaries and blog posts to represent a broad demographic and user base and lesson logs.

For the King's Theatre and heritage experience we will assess and record:

- The number of visitors and the frequency of visits
- Visitor demographics (postcode, ethnicity, age, gender, employment status, disability status)
- Hits and length of time spent on digital archives
- Assess the impact, enjoyment and quality
- Assess and ease of travelling throughout the venue for visitors and performers
- Quality of theatre environment including sightlines, seats, temperature, amenities and hospitality
- Enjoyment of heritage visitor experience, levels of engagement with other heritage activities/venues, ease of interpretation, what they have learnt, mix of learning styles

For the heritage engagement activities, we will:

- Record the number of sessions/activities delivered
- Number and background of participants in engagement activities
- Number of attendees at events, tours and workshops
- Assess impact and enjoyment
- We will collate data on improved heritage understanding, motivation to engage with other heritage, community or arts projects, improved wellbeing.

We will collect data at the end of each activity, and where possible, three months post completion of the activity. Between the Development and Delivery Phases we will adopt a design led approach to evaluation and subsequent project design.

For training and development we will:

- Record the number of staff, volunteers, unemployed/unskilled people, community groups and students trained in new heritage skills, management skills, tours, fundraising, archival and conservation skills.

For environmental we will measure:

- Gas, water and electricity usage during the development phase
- Levels of waste and recycling
- Cost of energy wastage

Data Collection Resources

Our Evaluation Consultant will lead on the methodology and detailed approach worked through in a logic model. They will write the annual survey and organise the focus groups, informal discussion groups etc. Our staff team will have responsibility for gathering the data on an ongoing basis and the consultant will collate the data from various departments e.g.; Learning and Participation team, green team, Marketing and Box office, Project Manager. The Evaluation Consultant will then analyse the data and write the final evaluation report which will include key findings, lesson learning and successes.

We will publish the project completion evaluation report on our website and disseminate it through organisations like Creative Edinburgh, Culture Republic, Creative Scotland's Creative Learning Network

and/or the National Convention for Youth Drama and share our learning with other organisations as requested. We will happily organise meetings, tours, share documents with other organisations, and participate in seminars, talks or conferences as invited.

Carbon Footprint Assessment

We will engage Best Foot Forwards to utilise their foot printing tool to measure the environmental impact of the King's redevelopment project and calculate the carbon footprint of the utilities consumption and visitor travel associated with the project. We will develop a plan to reduce our environmental impact.

Appendix II – Outline Evaluation Model

Outcomes for people	Indicators	How will we gather the data
An increase in disabled visitors, performers and staff using and working at the King's	# of disabled visitors, staff and performers increase # Shows with disabled performers	<ul style="list-style-type: none"> · HR records · Performance records · Box office data (ENTA)
Staff, volunteers, users and visitors heritage skills and knowledge have been advanced.	# of episodes of heritage training, activities and engagement # of people participating in programme activities, training and engagement # of individuals who undertake further heritage training # visitors of the heritage experience that report that their heritage knowledge has improved. # of staff, artists, workshop leaders and volunteers have the skills to provide ongoing engaging heritage interpretation activities # of local participants develop their creative skills through working with professional performers, artists and producers # of participating FE and HE students gain insight into traditional building trade skills and understand how to take training opportunities further within FE and HE # of young people develop an interest in the performing arts and spin off careers that may be carried forward into subsequent course and career choices Staff, volunteers, users and volunteers describe the difference the heritage makes to them Visitors and users will share their knowledge and understanding # of people taking part in the construction team placement programme/hard hat tours/demonstrations and workshops	<ul style="list-style-type: none"> · Feedback forms from participants · Feedback forms from teachers/group leaders/carers of the participants · Feedback forms of people delivering i.e. Artists, Contractors, Workshop leaders · Social media analytics · Online surveys · Documentation of training activities/research trips/on the job learning · Activity tracking · Contractors employment and training records · Observations · Interviews · Participant blogs posts and diaries

<p>Community engagement activities produce a more diverse staff, volunteer, user and visitor base that engage with our theatres ongoing.</p>	<p># of local people from different backgrounds and ages enjoy sharing their memories and experiences of the building and local area, with memories passed on to younger generations/ people new to the area # of the local community that report that a sense of ownership and connection to the King's and area is developed # of underrepresented or disadvantaged groups is increased # of young people participating in programme activities Our audience is more diverse three years after opening</p>	<ul style="list-style-type: none"> · Box office data (ENTA) · Post event/visit self-completion surveys (onsite and digital) · Learning and participation records · Annual survey
<p>Environmental impacts of the King's will be reduced.</p>	<p>Energy and water bills do down Energy surveys shows less inefficiencies More visitors travel by walking/cycling/car sharing or public transport The ratio for recycling to landfill collection increases</p>	<ul style="list-style-type: none"> · Energy / water tracking · Energy survey · Waste/recycling tracking · Visitor journeys · Financial tracking · Contractors environmental impact monitoring
<p>The King's economic impact will be greater, making the locality a better place to live, work and visit.</p>	<p>Jobs are created during the construction period The redeveloped building makes a positive contribution to physical appearance of the whole area Local businesses and thriving More visitors and performers visit, eat and stay in the local area Jobs created through the project</p>	<ul style="list-style-type: none"> · Surveys to local businesses · Self-completion surveys (in-house and digital) · Focus group discussions and surveys with touring companies and the local community · Analysis of reports provided by contractors · HR data
<p>An increase in audiences and supporters improves financial resilience.</p>	<p>Increase in visitor numbers during the day Increase in tickets sales Numbers of donations goes up Increase in café and bar sales A wider range of productions are secured for the Kings New companies perform at the King's</p>	<ul style="list-style-type: none"> · Box office data (ENTA) · Visitor counter · Financial tracking · Development data (ThankQ)

<p>The community is engaged with the theatre, its redevelopment and are more aware of its heritage.</p>	<p># Local audiences and participants' awareness and knowledge of the heritage of the King's building is increased Repeat visits to the theatre and visitor attraction increase during two years post opening # of programme activities staged throughout the project (including heritage, artistic, learning, outreach) # participants who have attended previous heritage events at the King's # of participants who report enjoyment at their participation # of participants who rate the activities as high quality (e.g. on 1-5 scale of 'low quality' to 'high quality') # participants who say they would like to participate in more activities/ plan to visit the King's once it opens # of participants who say they will be telling others about the activities/ the archive, and encouraging them to participate/ visit the King's for the visitor attraction, café and bar, and to attend performances once open # of volunteers</p>	<ul style="list-style-type: none"> · Stakeholder surveys · Post event / visit self-completion surveys (in-house and digital) · Focus group discussions and surveys with local community · Learning and Participation records and data · Focus Groups · Interviews · Post card feedback forms · Participant blogs posts and diaries
<p>The prime heritage venue is optimised with day and evening activity.</p>	<p>Practitioners, education partners, community groups and the public access and make use the heritage experience Increased engagement with local schools visit the King's and take part in Learning & Participation workshops and activities The variety of facilities providing draws for a large and diverse audiences at different times during the day and evening The Learning Studio is well used for learning and engagement activities, community hires and rehearsals Corporate hires during the day and evening increase The cafes and bars day and evening income increases</p>	<ul style="list-style-type: none"> · Financial reporting · Corporate hire data · Visitor counter · Learning and Participation records and data · Box office data (ENTA)