THE INSTITUTE OF CONSERVATION

Invitation to Tender

Project name: Evaluation of the NLHF funded project 'Heritage Conservation: A Resilient and Engaging Future'
Client: Emma Jhita – Chief Executive, Icon
Planned start date: 21 December 2026
Planned finish date: 04 January 2028

1. Introduction

Icon (the Institute of Conservation), the Client, is seeking to appoint a consultant to evaluate Icon's NLHF funded project 'Heritage Conservation: A Resilient and Engaging Future.'

Icon is seeking to contract a professional evaluation consultant to support the development of a monitoring framework which will enable an annual review of delivery, followed by an end of project report. This will incorporate feedback from the Icon staff team, Icon volunteers, collaborative organisations, and most importantly, the individuals and communities engaged via the project.

The project aims to use conservation to engage new and broader audiences in heritage, so the approach to project evaluation will need to be accessible and inclusive to ensure all participants and volunteers can contribute to its success and future legacy.

2. About Icon

Icon's vision is to protect, preserve and promote our treasured cultural heritage through cultivating skilled conservation professionals, supporting meaningful collaboration across the cultural heritage sector, and delivering public benefit through engagement and advocacy.

Icon's mission is to represent and support the practice and profession of conservation by promoting the public value of caring for cultural heritage and upholding high standards and ethics in conservation practice.

Our Charitable Objects are:

- To advance the education of the public by research into and the promotion of the conservation of items and collections of items of cultural, aesthetic, historic and scientific value; and
- To preserve and conserve items and collections of items of cultural, aesthetic, historic and scientific value.

3. About the Project

Key objectives:

- Champion conservation and celebrate conservators at a challenging time for the profession and wider sector (mainly due to funding challenges).
- Provide greater access to heritage for young people, underserved communities, and the wider public.

- Provide greater public understanding of conservation as a profession, and of the range of accessible routes into a career in heritage.
- Support and develop Icon's volunteers via the Groups structure.

This project will see Icon's volunteer-led Groups supported by the Groups and Public Programmes Lead to:

- Grow their capacity and resilience.
- Upskill through relevant training and opportunities.
- Grow their confidence to better communicate the value of conservation to the public.
- Use their expertise to engage wider audiences with heritage.
- Develop and deliver new, more accessible, initiatives – relevant to more diverse audiences.
- Support increased levels of engagement and understanding of the relevance of conservation.

3.1 Supporting NLHF's Investment Principles

Heritage Conservation: A Resilient and Engaging Future will take the Heritage Fund's four investment principles into account in the following ways:

- **Saving Heritage:** Through increasing access to, understanding and knowledge of wide-ranging heritage objects, this project will support individuals of all ages and from all backgrounds to connect-with and treasure our shared heritage.
- **Protecting the Environment:** This project will champion the role of heritage and historic sites in supporting nature and the role of conservation in innovating to reduce environmental impact. Icon's Sustainability Group is a leading voice in this area.
- **Inclusion, access, and participation:** With the support of Icon's EDI Champions, the EDI Officer in the Emerging Professionals Group, and through our partnerships with community-based outreach charities and organisations, this project will support more individuals to access heritage and participate in programmes that inspire them.
- **Organisational Sustainability:** Icon will be able to maximise income from initiatives such as Find a Conservator, and build relationships with trust and foundation funders, corporate and individual sponsors and supporters to ensure financial resilience and sustained additional revenue sources.

4. Timetable and Key Information for Tendering Process

Action	Date
Publication of invitation to tender	20 November 2026
Deadline for receipt of questions. Responses to questions or requests received will be distributed to all who have expressed an interest in tendering. By emailing you have expressed an interest	9 December 2026 (23:59)
Time and date for return of tenders	16 December 2026 (12 noon)
Selected bidders interviewed	18 December 2026
Expected date of award of contract	21 December 2026

Date contract expected to commence	21 December 2026
Expected date of project evaluation framework	15 February 2027
Expected date of draft evaluation report	March 2028
Expected date of final evaluation report	April 2028
Date Icon sends final evaluation report to NLHF	April 2028

4.1 Contacts

All queries relating to this tender must be made in writing via email to emma.jhita@icon.org.uk

5. Condition of this tender

5.1 Contract Period

The contract is to be for a period of 16 months from 21 December 2026 until 14 April 2028 unless terminated or extended by Icon.

5.2 Eligibility

No bid will be accepted from a person or organisation that has been involved with this project, or from those currently or previously employed by Icon.

5.3 Sending of Tenders

Your tender must be returned in its entirety by email in PDF format, clearly titled 'Tender for Icon's Evaluation of the NLHF Project – Heritage Conservation: A Resilient and Engaging Future.' The Project Title should be clearly stated on the email title bar.

Tenders must be returned to arrive by **12 noon on 16 December 2026** as stated in the Timetable.

6. Specification

6.1 Details of work required

The purpose of this project is to provide Icon with an evaluation framework for use across the period of project delivery, followed by a broad reaching report on the impact and success of the NLHF funded project 'Heritage Conservation: A Resilient and Engaging Future. This report will be submitted to NLHF, form the basis of project impact dissemination throughout the sector, and form a basis for ongoing project development and legacy.

The work required is to provide an objective assessment of how well the scheme has been delivered and of the impact the Heritage Conservation: A Resilient and Engaging Future project has had on the cultural heritage sector and increasing engagement via conservation.

The evaluation will need to take into consideration the following areas:

- Fitness for purpose - did the programme achieve the stated aims
- Value for money – has it given a good return on investment
- Level of engagement and quality of training or activities provided – via feedback received from participants, partners and volunteers

- Reach and scope of engagement – has the project genuinely inspired new audiences to engage with heritage
- Volunteer development and engagement – how successful has the project been at supporting volunteers to upskill, and has it led to increased volunteer engagement
- Providing more career development opportunities and entry into new employment – what impact has it had on building the capacity of the conservation workforce
- Impact on the cultural heritage sector – how has the project connected and maximised benefit from collaborative working with partners in the sector
- Analysis of Icon and legacy of the project – developing our skills in providing a sustainable engagement project, leading to a resilient public programme for the future

Evaluation Framework

The appointed consultant will be expected to develop a proportionate evaluation framework at the outset of the project. This framework should identify:

- The key outcomes and indicators to be monitored throughout delivery.
- The quantitative and qualitative data required to assess the project's impact.
- Appropriate methods for collecting evidence from participants, volunteers, partners and stakeholders.
- Measures relating to engagement with young people, underserved communities and wider public audiences.
- Any additional data collection requirements necessary to evaluate the project's contribution to National Lottery Heritage Fund outcomes and investment principles.

The framework should be designed so that monitoring activity can be embedded within project delivery and implemented by the Icon team wherever possible.

Additional Information on Icon's Support

- To ensure the evaluation can be delivered within the available budget, Icon will provide substantial practical support throughout the project. This will include:
- Establishing and maintaining data collection systems.
- Collating and providing quantitative monitoring data throughout the project.
- Supporting the collection and organisation of qualitative feedback from participants, volunteers and partners.
- Drafting and distributing participant communications, including surveys, questionnaires and reminder emails.
- Providing access to relevant project documentation, monitoring information and stakeholder contacts.
- Supporting the scheduling of interviews, focus groups or other consultation activity where required.

6.2 Methodology

The evaluation should include an appropriate combination of quantitative and qualitative evidence. It is anticipated that much of the quantitative monitoring data will be collected by Icon during project delivery and provided to the consultant for analysis.

The consultant will be expected to advise on data requirements, develop appropriate evaluation tools where required, analyse project evidence, and undertake targeted qualitative research with key stakeholders. This may include consultation with Icon staff, volunteers, project participants, partner organisations, young people engaged through project activities, host organisations and sector representatives.

The methodology should be accessible, inclusive and proportionate to the scale of the project, ensuring that participants from a range of backgrounds can contribute their views and experiences.

This wording emphasises that Icon will do much of the operational work while the consultant brings evaluation expertise, which should help attract realistic bids within the £6,800 budget.

Materials produced (output)
Project Evaluation Framework produced for the Client
Draft evaluation report to the Client
Final evaluation report in electronic format with executive summary and any recommendations to the Client

Milestone	**Date**
Project initiation meeting with Client	21 December 2026
Project Evaluation Framework produced for the Client	15 February 2027
Draft evaluation report submitted to Client	March 2028
Final evaluation report submitted to Client	April 2028

6.3 Price and Costs

This tender is open to bids up to £6,800 (plus VAT if applicable) including all expenses.

6.4 Programme management

- Icon's Chief Executive will monitor and assure the quality of the project.
- Should submitted proposals not satisfy the tender specification we reserve the right to withdraw the tender.
- Suppliers are responsible for their own costs in responding to the tender.

7. Evaluation Criteria

The tender process will be conducted to ensure that tenders are evaluated fairly to ascertain the economically most advantageous tender.

Account will be taken of any factors which impact on the tenderer's suitability that emerge from the tendering process.

Your response to our requirement will be evaluated under the following headings:

Evaluation Matrix

Criteria	Individual Score
Relevant experience and knowledge • Demonstrable track record of evaluating projects for funding bodies • Experience and understanding of the cultural heritage or conservation sector and, or professional bodies	30%
Quality of proposals and capabilities • Understanding of the brief and strong proposals to meet the requirements • High level of knowledge concerning current professional development	30%
Project management • Clear proof of ability to deliver on time and to budget	20%
Price	20%

8. Payment Schedule

- 25% on completion of project evaluation framework
- 25% on submission of first draft of evaluation report
- 50% on acceptance of final report

9. Insurance

Contractors must carry Professional Indemnity Insurance with a limit of indemnity of not less than £500,000 for each individual claim. Evidence of this must be presented as part of the bid.