FREELANCE PROJECT EVALUATOR BRIEF

Organisation:	Dundee Industrial Heritage SCIO (Dundee Heritage Trust)
Role:	Freelance Project Evaluator
Estimated Fee:	£27,000 inclusive of expenses and exclusive of VAT if applicable
Estimated Duration:	46 ½ months
Timetable:	Proposal deadline: 5pm on Monday 11 January 2027 Interviews: w/c 25 January 2027 (estimated) Work commissioned: w/c 15 February 2027 (estimated) Work complete: end of December 2030 (fixed)
Location:	Home or company based Must be able to travel to Dundee for site familiarisation, evaluation consultations, and project meetings
Reporting to:	Sophie Walker, Development Officer

OVERVIEW

Dundee Heritage Trust is seeking to appoint a freelance Project Evaluator to monitor and evaluate the success of its **Discovery Point Transformed** project, a major redevelopment of one of Scotland's best-loved heritage attractions and its associated learning, volunteering, and community participation programmes from 2027 to 2030.

Funded by the National Lottery Heritage Fund, the Project Evaluator will incorporate the Museum's Activity, Access, Business, and Interpretation Plans into their reporting and become familiar with the charity, museum, and its transformation project.

TIMESCALE

Work will be carried out on a freelance basis from February 2027 to December 2030.

For the right candidate and by prior agreement, we would be willing to consider a modestly delayed start date. Please advise us of your preferred start in your proposal.

BUDGET

We are inviting competitive tenders of **no greater than £27,000**, inclusive of expenses but exclusive of VAT if applicable, for the work over the period specified.

1. DUNDEE HERITAGE TRUST

Dundee Industrial Heritage SCIO (DIH SCIO), known as **Dundee Heritage Trust** (DHT) is a registered Scottish Charitable Incorporated Organisation. The original charity was formed in 1985 to preserve and interpret Dundee's industrial past.

Today, the Trust is the proud guardian of **two of Scotland's best-loved museums:** Discovery Point, home to the globally significant Royal Research Ship *Discovery*, the ship built in 1901 to pioneer world-first scientific research in Antarctica, and Verdant Works, a restored Victorian jute mill telling the story of a global industry and its people.

Both sites are Accredited Museums and top-rated visitor attractions with TripAdvisor, together welcoming **around 70,000 curious people** each year.

For more information, see www.dundeeheritagetrust.co.uk.

2. DISCOVERY POINT TRANSFORMED

Dundee Heritage Trust is embarking on a major project to transform Discovery Point, create exciting **new museum experiences**, attract **new audiences**, and safeguard the future of the Royal Research Ship *Discovery* for the next 100 years.

It aspires to position Discovery Point as one of the UK's leading heritage attractions, and a **national centre for public engagement** with Antarctic heritage, science, and the environment, welcoming over 1 million visitors by 2045.

In order to achieve its impact, the project aims from 2027 to 2030 are to:

- **Enhance accessibility, interpretation, and interactivity** throughout the museum and ship, displaying more of our Recognised Collection of National Significance, updating our exhibitions and creating two state-of-the-art new galleries:
    - The first, *Drawn to the Pole*, will create a magnetic new introduction to the *Discovery* story for a wider range of visitors, asking why people were first drawn to Antarctica, placing the ship in a wider global context, and acknowledging its colonial connections for the first time.
    - The second new gallery, *Climate Science*, will immerse visitors in the sciences pioneered by *Discovery* and how they inform our global understanding of climate and oceans today.
- **Transform Discovery Point for the future,** introducing a new flexible events & conference space overlooking the River Tay where *Discovery* first sailed, a new learning space, enhanced visitor facilities (including a new Changing Places Toilet) and significant improvements to the environmental efficiency of the building.
- **Deliver a learning, volunteering, co-curation, and events programme** which will capitalise on the transformation to disrupt negative expectations of audiences who have previously disengaged from us, and create new routes to engage with audiences who do not ordinarily visit or participate in the museum.
- **Advance vital conservation works aboard RRS *Discovery*,** protecting a vital part of Dundee's heritage for future generations of visitors, and supporting the survival of critically endangered skills for its conservation.

3. ROLE DESCRIPTION

The purpose of the Evaluation will be to monitor and evaluate the progress and success of the Discovery Point Transformed project in meeting its objectives for visitors, learners, communities, audiences, stakeholders, and the Trust's onward sustainability. In doing so, it will inform the ongoing and future development of Dundee Heritage Trust.

The role of the Project Evaluator will be to:

- Establish an **Evaluation Plan** for the project based on an appropriate methodology agreed with Dundee Heritage Trust at the outset, referring to existing documents and frameworks and consulting closely with the Trust's team.

- Define the **monitoring, evaluation, & reporting** process and support the project team to implement it successfully.

- Review and refine the **objectives and KPIs to be evaluated** for the project, including for each Activity in the Activity Plan.

- Liaise with the Trust's team to **embed data collection methods** into everyday processes so that, for example, survey forms can be issued to visitors and/or participants automatically at appropriate points in their journey.

- Collate **relevant supporting material** for reporting to the project's funding stakeholders, including the National Lottery Heritage Fund and others.

- Produce **at least 3 reports** for the project's staff Steering Group, which may be shared with the Executive Management Team and/or Board of Trustees, making recommendations based on the data gathered. These should include:

    - **First interim report** during or towards the end of works on site, focused on progress, achievements, and learnings prior to reopening.

    - **Second interim report** between 3-6 months post-reopening, focused on immediate learnings from & next steps for the reconfigured site, including in respect to the exhibitions, staff, volunteers, visitors, schools, etc.

    - **Final project report** approx 18 months post-reopening in late 2030.

- Produce **5 case studies** of best practice examples and/or lessons learned through the project, to be shared with other museums, heritage, & tourism attractions and key funding stakeholders, likely covering areas such as heritage skills, community co-curation, public engagement in climate science, and others to be determined.

- Define a **Communication Plan** to share the results of the evaluation with the Trust's team, Board, and external stakeholders, particularly other museums, heritage & tourism attractions and relevant sector networks.

The "Evaluation", as above, will measure the success of the project, and the results will be used by the project team and wider staff team to improve visitor numbers and experience, deliver strong and impactful engagement activities, support future funding applications, and inform continuing development of the organisation.

4. DATA COLLECTION

The Heritage Manager, Marketing Manager, Finance Manager, and Digital Services Officer will play a role in collecting evaluation data on a regular basis. This will be in consultation with the Project Evaluator.

The data is expected to include the following:

Measure	Data	Collected by
Visitor numbers	Admissions (#s, types, & geographics)	Staff
	Spend behaviour (average SPVs)	
	Website analytics	
	Social media statistics	
Visitor experience	Museum visitor surveys	Staff & Evaluator
	Online reviews	Staff
Volunteer numbers and satisfaction	Volunteer statistics	Staff
	Volunteer satisfaction surveys	Evaluator
Schools involvement	Number of school visits	Staff
	Follow-up feedback surveys	Evaluator
Community groups	Number of interactions	Staff
	Follow-up feedback surveys	Evaluator
Community/tourist awareness	Distribution/consumption of leaflets	Staff
	Non-user questionnaires taken outwith the museum	Evaluator
Enquiries relating to the heritage/collection	Enquiry statistics and response rate	Staff
Other measures as deemed appropriate	Other methods as deemed appropriate	Staff/Evaluator

Please note that we will desire consideration to be given to the appropriateness of methods used and data collected in respect to the dignity and wellbeing of all people with whom the Trust interacts, whom we consider variously as partners, stakeholders, and participants in our work, and not exclusively as “benefactors” or “beneficiaries”.

5. ATTENDANCE / REPORTING

The role can be hybrid, with site visits on a regular basis.

The Project Evaluator must:

- Attend regular meetings with the project's staff Steering Group as needed to agree targets and review progress.
- Provide **5 written case studies** at agreed points in the project.
- Provide **2 interim written reports** at agreed stages of the project.
- Submit **1 final written report** in November 2030 including methodology, conclusions documenting the evaluation completed, the success of the project in achieving its objectives/KPIs, and recommendations including KPIs for future work.

Please note that Dundee Heritage Trust will retain copyright over all information and reports produced during the evaluation.

6. CONTRACT MANAGEMENT

Timetable

Work will be carried out on a freelance basis between February 2027 and December 2030, with the final report being due end of November 2030.

Budget

The budget for this work will be **no greater than £27,000** inclusive of expenses but exclusive of VAT, if applicable. Payment will be on a staged basis, with regular payments throughout and on submission of the final Evaluation Report.

Reporting

The contract will be managed by Sophie Walker, Development Officer for the Trust, who will monitor progress on an ongoing basis to ensure the project deadlines are met.

Payments will be approved on production of satisfactory work.

7. AWARD CRITERIA

Proposals should set out their proposed methodology in an **Evaluation Plan.**

This should include:

- An understanding of the purpose and priorities of the evaluation for Discovery Point and Dundee Heritage Trust
- Sources of evaluative data
- Identification of any documentary material to be reviewed and analysed
- Identification of any museums, partners, stakeholders, or individuals to interview
- Description of interview programmes, evaluation surveys, focus groups, or other methodologies to be used
- A proposed timeline of evaluation activity and key milestones

Proposals should also include:

- Appropriate **details of the Project Evaluator(s)** including a CV, summary of skills and experience, and details of a suitable referee.
- An **outline fee and payment schedule.**

The **Award Criteria** for assessment of proposals will be as follows:

1. Understanding of the brief: To what extent does the proposal demonstrate an understanding of the issues related to this brief?
2. Methodology: To what extent are the methodology and approach appropriate to the requirements set out in this brief?
3. Experience & competence: What degree of experience and competence does the bidder demonstrate in order to successfully complete and/or add value the work?
4. Deliverability: How well has the bidder structured their proposal successfully to manage the contract and deliver the services to budget and timetable required?

To discuss the role, please contact Sophie Walker, Development Officer sophie.walker@dundeeheritage.co.uk to arrange a chat.

8. PROCUREMENT PROCESS

Proposal deadline:	5pm on Monday 11 January 2027
Interviews:	w/c 25 January 2027 (estimated)
Work commissioned:	w/c 15 February 2027 (estimated)
Work complete:	end of December 2030 (fixed)

Proposals should be submitted to Sophie Walker, Development Officer, by email at sophie.walker@dundeeheritage.co.uk