



South West Heritage Trust Chew Valley Hoard Project Delivery Phase

Brief for Evaluation Consultant

Introduction

The South West Heritage Trust (SWHT) invites tenders from experienced evaluation consultants with a strong track record of independently evaluating major National Lottery Heritage Fund (NLHF) capital and activity projects to provide the delivery-phase evaluation of the Chew Valley Hoard (CVH) Project.

This role will be central in ensuring that we can robustly assess the impact of a multifaceted capital and activity project and that the learning generated through the project is captured, shared and used to inform our work and that of the wider sector.

The consultant will work with SWHT staff, delivery partners and communities to embed evaluation into the project's culture, and provide high-quality, independent insight at key points. The consultant will also ensure that evaluation remains aligned to the vision and outcomes set out in the project plans and adapts where necessary to remain relevant throughout the delivery phase.

Project Background

The Chew Valley Hoard is the largest Norman coin hoard ever discovered. Its acquisition by SWHT in 2024 has inspired a multi-stranded project that includes the creation of a new permanent gallery at the Museum of Somerset, a temporary exhibition at both the Museum and the Roman Baths, and a wide-ranging programme of community engagement, co-creation and learning activities. The project also includes a strong focus on developing commercial thinking within the organisation, using the profile and momentum of the hoard to trial and embed new approaches to income generation, organisational sustainability and audience development.

Project audiences span primary school children, young people, families, adults aged 55+, and individuals at risk of exclusion, such as people seeking sanctuary.

The project's aims are to:

- Increase access to and understanding of this nationally significant find
- Engage a broader range of audiences through co-created programming
- Strengthen organisational sustainability through business development

- Embed environmentally responsible practices throughout delivery

An Evaluation Plan has been developed to guide delivery. It sets out the project's logic model, strategic aims, evaluation framework and core questions, and forms the foundation for the evaluation of the project's delivery.

Role and Requirements

The evaluation consultant will be responsible for delivering a thoughtful, inclusive and outcomes-focused evaluation that follows the NLHF's evaluation guidance and reflects SWHT's values.

The evaluation will align with the NLHF's four investment principles —Inclusion, Access and Participation; Saving Heritage; Organisational Sustainability; and Protecting the Environment — ensuring the Chew Valley Hoard project delivers meaningful impact and legacy.

Key responsibilities include:

- Revisiting and refining the existing Evaluation Plan developed during the development phase, ensuring it remains fit for purpose during delivery.
- Establishing and embedding practical monitoring systems in collaboration with project teams, partners, freelancers, and volunteers.
- Advising on, co-designing, and supporting the implementation of a range of evaluation tools and methods (e.g. surveys, interviews, observations, feedback forms, and creative approaches) tailored to different audiences.
- Collecting, collating, analysing, and interpreting both qualitative and quantitative data across project strands to assess change over time, including both outcome and process evaluation.
- Supporting co-designed evaluation activity and encouraging embedded evaluation practice throughout delivery.
- Providing evaluation training and support to members of the delivery team when needed.
- Facilitating structured reflection workshops and insight sessions to surface learning and inform adaptation.
- Working closely with the Project Engagement Manager to provide regular progress updates to SWHT's Head of Development and Partnerships, CEO and Head of Museums and Engagement.
- Attending key project meetings and site visits as needed.
- Producing a mid-term evaluation review to provide formative feedback and recommendations (spring 2027).
- Producing a final evaluation report suitable for NLHF reporting and wider stakeholder use – including outcomes, impact assessment, lessons learned and legacy recommendations (June 2028)
- Presenting evaluation findings in accessible and inclusive formats and advising on ways to share outcomes publicly.

The evaluation will actively contribute to shaping SWHT's future practice and strategic planning, ensuring the legacy of the Chew Valley Hoard project is fully realised by:

- Assessing the extent to which the project contributes to NLHF investment principles and SWHT outcomes and project-specific objectives
- Evidencing impacts for a diverse range of participants and audiences
- Capturing the learning process across delivery and inform responsive change
- Providing legacy insights to shape future programming and strategic planning
- Sharing findings with internal and external audiences in engaging and accessible ways

Skills and Experience

We are seeking an experienced evaluation consultant who:

- Brings substantial experience of evaluating major heritage projects funded by the National Lottery Heritage Fund, featuring both capital and activity elements, and particularly in the context of museums.
- Has proven experience evaluating delivery against business plans in the heritage sector, including those encompassing commercial growth, organisational sustainability and audience development.
- Prides themselves on drawing out robust, pertinent, and practical insights for clients.
- Is skilled in participatory, co-designed, and inclusive evaluation approaches.
- Has proven experience in both process and outcomes evaluation.
- Works confidently with a range of stakeholders, including delivery teams, museum operations, design and capital teams, volunteers, community groups, and partners.
- Offers strong writing and data analysis skills, with the ability to communicate findings clearly.
- Understands environmental impact measurement and sustainability in cultural or heritage settings.
- Can foster trust and support capacity-building within project teams, promoting a culture of reflective learning and improvement.
- Is fully conversant with the 'Evaluation Good Practice Guidance' set out on the NLHF website and have a sound understanding of NLHF's four investment principles under its 10-year strategy, Heritage 2033, and their application to this project.
- Can demonstrate understanding of participatory evaluation approaches.
- Has strong skills in both quantitative and qualitative data collection and analysis.
- Has a track record of supporting and embedding monitoring systems with staff and delivery partners.
- Has excellent communication skills, including producing clear, engaging evaluation outputs for a range of audiences.
- Has a strong understanding of the principles of equality, diversity, inclusion and access in relation to all aspects of the project in line with the Trust's Audience Development Strategy and Equalities Strategy.
- Has experience working in sanctuary-seeking or inclusion-led contexts.
- Has experience facilitating reflective learning processes and insight workshops.

The consultant will be required to have public liability and professional indemnity insurance.

Fee & Methodology

The fee available for this assignment is up to £20,000 including expenses and excluding VAT. Payment terms to be staged payments in arrears. Schedule to be agreed with the successful tenderer.

The consultant will work remotely, with occasional in-person meetings or workshops as needed. A flexible and collaborative approach is essential, with the ability to adjust working patterns around project deadlines and team availability.

The role reports to the Head of Development and Partnerships, working closely with the Activity Plan Supervisor and Project Engagement Manager.

Timeline

The contract will start in March 2026 and will run until the project's expected completion in June 2028.

How to Apply

Tenders should take the form of a short written proposal (maximum eight sides of A4) setting out:

- Your interest in undertaking this assignment.
- Relevant skills, knowledge and experience.
- A list of recent relevant projects (last five years) quoting client, dates, services provided and approximate contract value.
- How you would add value to the project.
- Your thoughts on the key risks and challenges for the project.
- Your proposed methodology and lump sum fee to undertake the work, including all expenses and VAT if applicable. Please specify your day and hourly rate and how many days you have included for within your fee bid proposal.
- Details of two referees for whom you have conducted similar services over the past five years.
- A statement confirming compliance with GDPR and the Data Protection Act 2018.

Deadline for applications: **12pm on Friday 13 March 2026.**

For an informal conversation before applying, please contact Dylan Edgar, Head of Partnerships and Development (dylan.edgar@swheritage.org.uk) or Carrie Blogg, CVH Project Heritage Consultant (cblogg@btinternet.com).

Tender Evaluation

Tender scoring criteria will be on the basis of:

- 20% for price
- 40% for quality/experience/methodology
- 40% for added value.

In the event that interviews are held these will be assessed separately.

Decision and Award

SWHT reserves the right to negotiate with the preferred bidder and to award all, part or none of the contract.

Copyright

The copyright of any materials produced during the contract will rest with SWHT.

Acknowledgement

This project is supported by The National Lottery Heritage Fund. Thanks to National Lottery players, this nationally significant hoard has been saved for the nation and will be shared with audiences across Somerset and beyond.