



South West Heritage Trust Heritage Landscape Project Brief for Evaluation Consultant

1. Introduction

South West Heritage Trust (SWHT) wishes to appoint an experienced evaluation consultant to develop an Evaluation Plan to support its National Lottery Heritage Fund (NLHF) Second Round delivery phase grant application for a nationally significant heritage landscape project and to undertake an evaluation of the project development phase. Submission of the NLHF delivery grant application is targeted for November 2026.

Subject to satisfactory performance and the successful award of the NLHF delivery grant, the appointment will be extended to provide evaluation consultancy services for the delivery phase of the project to assess and evaluate the project's outcomes and impacts so that the learning generated through the project is captured, shared and used to inform our work and the wider sector.

2. Organisation Background

The South West Heritage Trust was founded in 2014 as an independent charity for Somerset, Devon and the South West. We deliver museum, archive and historic environment services previously provided by Somerset County Council, and archive services previously provided by Devon County Council.

Our vision is to 'celebrate and protect the rich heritage of the South West, helping to ensure its contribution to society now and in the future, and to strengthen communities, inspire learning and enrich lives.'

Our work is guided by the Trust's '*Building for the Future: A Strategy for 2025-30*', which is supplemented annually by the detailed actions set out in the Trust's Business Plan, service plans and other plans.

3. Project Background

This nationally important site in Somerset witnessed one of the key turning points in early English history. It contains significant heritage from the Iron Age, Anglo-Saxon and medieval periods.

The site is a Scheduled Ancient Monument and is currently in private ownership. The owners are now intending to sell the site but wish for it to be preserved and protected for the nation. The Trust is working with Somerset Council to raise the funds to acquire the site

to bring it into public ownership, to improve and increase public access to it and to deliver a community engagement programme to increase participation in the site's extraordinarily rich heritage. The proposed freehold acquisition would be by the Council, then by way of a long lease to the Trust who would manage and be responsible for the site.

The location of the site will be revealed to applicants in confidence upon request.

4. Project Aims

The project is aiming to acquire the outstanding nationally important historic site and the surrounding ancient landscape to bring it into public ownership and to protect it for the nation. The project will:

- Acquire 60 acres of Scheduled Ancient Monument land.
- Conserve a 19th century Grade II heritage structure.
- Work with an adjacent landowner to construct a footbridge to provide public access to the site.
- Create a new public access route to the heritage structure to replace the existing Permissive Right of Way that will cease upon sale of the freehold.
- Construct a second footbridge to connect the site with a local long-distance footpath.
- Create and install tracks and pedestrian gates around the site for public access.
- Create and deliver site interpretation that is sensitive and appropriate to the historic landscape setting.
- Develop and deliver a public engagement programme including on-site events, activities in the community and the creation of digital resources.
- Work with Somerset Wildlife Trust, the Environment Agency and others to identify and protect the site's special habitats and to increase biodiversity.
- Undertake archaeological research to fill in gaps in our knowledge and to increase understanding of this historically outstanding site.
- Develop and deliver a publicity programme to raise public awareness of the importance of the site and to build interest in visiting.
- Provide opportunities to trial and test new operating models and methods in how the Trust's landscape sites are managed, maintained and monitored to enable the Trust to improve how it captures, proves and demonstrates outcomes and impacts from its work in this area of its business portfolio.

5. Outline of Work

Part One – NLHF Second Round Development Phase

- Working closely with the SWHT client project team and with other project consultants, the consultant will design and produce a plan and framework (based on a logic model) to be used during project delivery to measure the impact, benefits and legacy of National Lottery investment from the project, in accordance with NLHF good practice guidance. The plan should set out what is being evaluated and why, methods for data collection and reporting, and who will do this.
- Input to the work being led by the client's Head of Development and Partnerships on how this project will inform new operating models and methods in how the Trust's landscape sites are managed, maintained and monitored to enable the Trust to

improve how it captures, proves and demonstrates outcomes and impacts from its work in this area of its business portfolio.

- Undertake an evaluation of the development phase of the project, reflecting on what has gone well, what has gone less well, lessons learnt, and any changes that may need to be considered for the project during the delivery phase. The required output is a short Development Phase Evaluation Report that will be submitted with the NLHF development phase grant completion report.

Part Two – Delivery Phase

Reappointment for Part Two will be subject to previous satisfactory performance and confirmation of the Second Round delivery grant award from NLHF.

- Revisit and refine the plan developed during the development phase, ensuring it remains fit for purpose during delivery.
- Establish and embed practical monitoring systems in collaboration with project teams and partners.
- Advise on, co-design and support the implementation of a range of evaluation tools and methods (e.g. surveys, interviews, observations, feedback forms, and creative approaches) tailored to different audiences.
- Collect, collate, analyse and interpret both qualitative and quantitative data to assess change over time, including both outcome and process evaluation.
- Support co-designed evaluation activity and encourage embedded evaluation practice throughout delivery.
- Provide evaluation training and support to members of the delivery team when needed.
- Facilitate structured reflection workshops and insight sessions to surface learning and inform adaptation.
- Advise and support the Trust in developing metrics and methodologies to capture data from this and other landscape sites in its portfolio, e.g. visitor numbers, to enable the Trust to improve how it proves and demonstrates outcomes and impacts from its work in this area of its business portfolio.
- Provide regular progress updates to the client project team.
- Attend key project meetings and site visits as needed.
- Produce a mid-term evaluation review to provide formative feedback and recommendations.
- Produce a final summative evaluation report suitable for NLHF reporting and wider stakeholder use, including strategic legacy recommendations.
- Present evaluation findings in accessible and inclusive formats and advise on ways to share outcomes publicly.

6. Project Timescales

The anticipated timescales are:

- **Part One** – NLHF Second Round Development: July 2026 to December 2026
- **Part Two** – Project Delivery: May 2027 to December 2028

7. Essential Requirements

- The consultant must be 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.
- Significant practical knowledge and experience of evaluating NLHF projects from inception to completion, including in respect of landscape projects, and involving capital and activity elements.
- Substantial experience of working closely with a range of stakeholders, including client teams, NLHF project development and delivery consultants, volunteers, community groups and partners during both project development and project delivery phases.
- Experience of evaluating projects involving a wide range of audiences and of evaluating activities for vulnerable and disadvantaged groups and hard-to-reach audiences.
- Proven experience in both process and outcomes evaluation.
- 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.
- Capacity and flexibility to commence the assignment immediately following appointment and to be available for the duration of the anticipated timescales set out above.
- A flexible and collaborative approach, with the ability to attend key project meetings in person, and to adjust working patterns around project meetings, deadlines and team availability.
- The consultant will be required to have public liability and professional indemnity insurance.
- The consultant must have an independent means of travel as the site is not served by public transport.

8. Fee & Methodology

The fee available for this assignment is

Part One – Development Phase – up to **£7,500** including expenses and excluding VAT.

Part Two – Delivery Phase – 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. Appointment to Part Two is dependent on previous satisfactory performance and confirmation of the Second Round delivery grant award from NLHF.

9. How to Apply

Tenders should take the form of a short written proposal (maximum 12 sides of A4) setting out:

- Your interest in undertaking this assignment.
- Suitability to undertake this work, with examples of relevant previous work that demonstrates your skills, knowledge, understanding and experience of working on NLHF-funded projects of a similar type and scale.
- How you would add value to the project.

- Your proposed methodology and lump sum fee to undertake the work, broken down into Part One and Part Two, 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.

Please also include a copy of your CV (maximum two sides of A4).

10. Tender Timeframe and Process

- Tender responses to be submitted by email to dylan.edgar@swheritage.org.uk by Friday 10 July 2026.
- Interviews, if required, will take place w/c 13 July 2026.
- Start date is expected to be late July 2026.

11. Tender Evaluation

Tender scoring criteria will be on the basis of:

- 30% for price
- 50% for quality/experience/methodology
- 20% for added value

12. Decision and Award

South West Heritage Trust reserves the right to negotiate with the preferred bidder and to award all, part or none of the contract.

13. Copyright

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

14. Contact Details

If you have any queries in advance of submitting a tender please contact Dylan Edgar, Head of Partnerships and Development. Tel: 07961 050323; email dylan.edgar@swheritage.org.uk.