

External Evaluation Consultant Brief

Mountain Heritage Trust (MHT)

Overview

Founded by Chris Bonington, John Innerdale, Lord Roger Chorley, Audrey Salkeld, James Smith and John Porter, the Mountain Heritage Trust houses one of the most significant collections of historical climbing and mountaineering material in the world. For over 25 years the Trust has been protecting, preserving and sharing this rich heritage so it can be enjoyed by future generations.

The collection is based in the Lake District at the Blencathra Field Studies Centre near Keswick and comprises archives, photographs, books, journals, artefacts and climbing equipment of national and international significance.

The Trust has recently secured support from the National Lottery Heritage Fund for **Moving Mountains with Purpose**, a two-year development project designed to strengthen the organisation, improve access to collections, develop audiences and partnerships, increase organisational resilience and create a stronger platform for future growth.

Who is Involved in the Project

The consultant will work alongside:

- Mountain Heritage Trust Board of Trustees
- Project Management Group (PMG)
- Communications and Business Development Manager
- Volunteers
- Specialist consultants appointed to support other elements of the project
- Key partners and stakeholders

Contract Management

The contract will be managed by the Project Management Group (PMG) on behalf of the Board of Trustees.

The PMG will provide access to relevant project documentation, staff, volunteers, trustees and partner organisations as required.

Evaluation Consultancy

Contract Value

Up to **£5,000 (inclusive of VAT and expenses)**.

Contract Period

November 2026 – September 2028

Purpose of the Commission

The Mountain Heritage Trust wishes to appoint an experienced Evaluation Consultant to develop and oversee a practical and proportionate evaluation framework for the *Moving Mountains with Purpose* project.

The consultant will help the Trust understand and demonstrate the impact of the project, measure progress against agreed outcomes and KPIs, and provide evidence that can inform future organisational development and funding opportunities.

The successful consultant should bring experience of evaluating heritage, cultural, charitable or community-based projects and be able to work collaboratively with trustees, staff, volunteers and partners.

Scope of Work

The consultant will:

1. Establish a Baseline

Undertake an initial assessment of the Trust's organisational position at the start of the project, linked to project outcomes and key performance indicators.

This should include consideration of:

- Organisational resilience
- Financial sustainability
- Volunteer capacity and skills
- Audience reach and engagement
- Partnerships and stakeholder engagement
- Public access to collections and heritage

2. Develop an Evaluation Framework

Produce a clear and practical framework that:

- Identifies appropriate qualitative and quantitative measures
- Establishes methods for collecting evidence
- Provides simple tools and templates where appropriate
- Integrates evaluation into project delivery from the outset

- Can be used by trustees, staff, volunteers and consultants

3. Support Delivery

Provide advice and guidance throughout the project to ensure evaluation activity remains proportionate, consistent and useful.

This may include:

- Briefing staff and volunteers
- Advising on surveys, feedback mechanisms and audience measurement
- Supporting project reviews where appropriate
- Advising on any amendments required to the evaluation framework during delivery

4. Mid-Project Review

Provide a formal mid-project evaluation report by **September 2027**, identifying:

- Progress against outcomes
- Emerging impacts
- Lessons learned
- Risks and opportunities
- Recommendations for the remainder of the project

5. Final Evaluation

Provide a final evaluation report by **September 2028** that:

- Assesses overall project impact
- Measures progress against agreed outcomes and KPIs
- Identifies lessons learned
- Captures organisational learning and legacy
- Provides recommendations to support future development of the Trust

Expected Outcomes

The evaluation should help the Trust understand:

- How organisational and financial resilience has developed
- How volunteer skills and capacity have increased
- How audiences have grown and diversified

- How access to collections and heritage has improved
- The impact of digitisation and online engagement activities
- The effectiveness of partnerships and collaborative projects
- The legacy of the project and how learning can inform future activity

Indicative Timetable

Activity	Target Date
Consultancy appointed	October / November 2026
Initial consultation meeting	November 2026
Baseline assessment completed	December 2026
Evaluation framework agreed	December 2026
Staff / volunteer briefing	January 2027
Mid-project evaluation report	September 2027
Final evaluation report	September 2028

Proposal Requirements

Interested consultants should provide:

A Short Proposal Including:

- Proposed methodology and approach
- Estimated number of days required
- Relevant experience and expertise
- Examples or case studies of similar work
- Daily rate
- Total cost
- Confirmation of availability to meet the timetable

References

Please provide details of two referees.

Assessment Criteria

Proposals will be assessed against:

Criteria	Weighting
Understanding of the brief and proposed methodology	30%
Relevant experience and track record	30%
Quality of previous evaluation work	20%
Value for money	20%

Submission Details

Proposals should be submitted by **17 October 2026** to:

enquiries@mountain-heritage.org

Please include **"Evaluation Consultant Proposal"** in the subject line.

We would also be grateful if applicants could indicate where they heard about this opportunity.