

PROJECT DEVELOPMENT MANAGER BRIEF AND INVITATION TO TENDER

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1. Description to the Improvement Project:

1.1 Introduction:

Wells Recreation Ground Trust (“WRGT”) wishes to engage an appropriately qualified and experienced Project Development Manager (“PDM”) to assist with an exciting heritage project (“the Project”) to enhance the Bishop’s Barn and Recreation Ground. This engagement could either be a self-employed professional or a project management company.

The WRGT is a registered charity and Mendip District Council (the “Council”) is the sole trustee.

The Wells Recreation Ground and Bishop’s Barn are at the heart of the community and were a gift by Bishop Hervey to the people of Wells to celebrate the silver jubilee of Queen Victoria in 1887.

The entire site including the barn is approximately 2.5 acres / 1 hectare in size and is located on edge of the historic centre of the city.

The barn itself dates to the early fifteenth century and is both a Grade I listed building (ID 483576) and a scheduled ancient monument (reference 1383158). It was built as a Great Barn for the threshing and storage of grain. The barn needs to find a modern/flexible/viable future role/function and it has been agreed to progress a barn enhancement scheme that puts the conservation needs of the barn at the heart of any proposals.

The barn sits on a public open space known as the Wells Recreation Ground.

1.2 Our ambitions:

The Trust has adopted a logical approach to achieving its objectives and during the past four years has sought advice on the improvement options for the building and land, and also to identify the best financial and governance models for the Trust.

During 2016, the bandstand was maintained and a new play area installed. In early 2017, Somerset Building Preservation Trust is project managing a number of minor repairs and enhancements to the barn to help increase use in the short-term.

WRGT has been working closely with English Heritage and has been in correspondence with the regional Heritage Lottery Fund team in Exeter. The intention is to make an application to the Heritage Lottery Fund (“HLF”) for support to improve the Bishop’s Barn.

Our ambitions are to:

- Deliver a holistic barn improvement scheme for the Bishop’s Barn that addresses the conservation needs of the building and delivers a multi-functional venue and community resource.
- Explore and deliver opportunities to enhance the recreation ground.
- Develop a full Marketing and Communications Plan to encourage more people to benefit from, be involved in, to learn about and to enjoy Wells’ heritage through the Bishop’s Barn and recreation ground.

In particular, we see the Project:

- Involving the public in community engagement and activity planning.
- Seeking to develop the site as a **family orientated destination**.
- Involving **young people** in creating the opportunities for public participation and linking with organisations that support young people.
- Encouraging older local residents to be involved and contributing to positive living and **an improved quality of life for older people**.

2. The Brief:

In 2011-12, Benjamin + Beauchamp were commissioned to undertake an Options Appraisal and this recommended that a holistic barn improvement scheme be progressed. This recommendation was based on having a heated barn that could be used year-round. This finding was subsequently endorsed by the Christina Dixon Consulting report in 2016 which identified and tested the preferred financial model for the Trust going forward.

Info at: <http://www.mendip.gov.uk/article/4791/Wells-Recreation-Ground-Trust---Forward-Plans>

The PDM will lead and co-ordinate all funding applications for improving both the Bishop’s barn and recreation ground.

The primary task is to secure a funding package for a larger barn improvement scheme. It is anticipated that the major funder will be HLF matched to other grants and with a contribution of at least 5% from the Trust. The PDM will work with the WRGT in the preparation of the HLF application under the **HLF Heritage Grants** scheme (for projects over £100,000) following a three stage process:

Info at: <https://www.hlf.org.uk/looking-funding/our-grant-programmes/heritage-grants>

- Stage 1: First Round Application.** Prepare and submit an application requesting a development grant from the HLF.
- Stage 2: Development Phase.** Work up the detailed Second Round Application. It is noted that HLF normally allow up to two years for this phase.
- Stage 3: Delivery Phase.** Deliver the barn improvement capital scheme.

The larger barn scheme should resolve the conservation needs of the building and deliver an improvement programme that will enable the building to become a viable year-round multi-use community venue. Stakeholder engagement and public consultation will be required.

The other task is to develop a masterplan for the outside space and in doing so explore, develop and deliver opportunities for enhancing the landscaping and recreational offer of the site. This task will require a number of separate funding packages to the barn scheme, possibly from funders such as Viridor Credits and others. It is envisaged that task will happen in parallel with the barn project.

3. Outline of Work

3.1 The PDM will oversee the Project from development to completion.

The PDM will be the principle point of contact between the Trust and other parties such as specialist consultants, service providers and grant funders. As part of this role, the PDM will undertake the following tasks:

- Developing a planned approach for improvements to the Bishop's Barn and recreation ground that , in project management terms is:
 - ❖ Delivered through consultation with the community and other stakeholders.
 - ❖ Maximises community engagement
 - ❖ Maximises public access and usage within the development period
 - ❖ Minimises risk for the project as a whole.
- Reviewing all available WRGT documents and background information, as required.
- Leading on all aspects of preparing, consulting and submitting funding bids, including HLF.
- With support from the Council and Wells City Council, identify funding opportunities for the recreation ground and identify potential community partners who can lead these funding applications, as required.
- Working in partnership with community organisations to support their applications for key elements of the planned approach.
- Supporting the expansion of the activities programme and building community input.
- Preparing project evaluation systems.
- Supporting the WRGT by:
 - ❖ Advising on and supporting all aspects of the project's development and delivery.
 - ❖ Ensuring the Project meets and complements WRGT's strategic aims and values.
 - ❖ Building on the work completed to date to ensure best value.
 - ❖ Ensuring excellent liaison with potential funders and key stakeholders.
 - ❖ Advising on a suitable contribution from WRGT itself as part of the match funding.
 - ❖ Assisting in preparing a launch/opening event.

3.2 Person specification:

The following are **essential**:

- Experience of heritage and community engagement projects.
- Experience of project planning.
- Experience of writing HLF and other grant applications.
- Excellent communication and interpersonal skills.
- Ability to attend frequent site visits to the Wells Recreation Ground, or be based in the Council offices.

The following would be **desirable**:

- Knowledge of working in the charitable / third sector.
- Degree-level education, with postgraduate qualifications in heritage management or a related field.
- It would be beneficial if the PDM was familiar with working on HLF funded projects.
- Understanding of *Space for Learning* and the generic learning and social outcomes (GLOs, GSOs) which HLF recognises in the evaluation of projects

Information at: <https://www.hlf.org.uk/about-us/news-features/inspired-learning>

4. Fees and Timescales:

The appointment is made on a freelance contract basis and is envisaged to entail approximately 645 days throughout the Project.

- Stage 1: First Round Application.** It is anticipated this could take <25 days over 6 months.
- Stage 2: Development Phase.** It is anticipated this could take <200 days over 2 years.
- Stage 3: Delivery Phase.** It is anticipated this could take 420 days over 2 years.

The latest HLF deadlines are published at <https://www.hlf.org.uk/looking-funding/our-grant-programmes/heritage-grants>

Work on Stage 1 should be carried out during 2017.

Stage 2 should start by the first half of 2018.

WRGT's aim is to submit a Stage 1 application in Autumn 2017.

The contract beyond Stage 1 will be subject to competition and be dependent upon grant funding being secured.

5. Terms of Engagement

The contract is being let by the Council on behalf of WRGT.

The post holder will report to the WRGT Committee on the Project.

On a day-to-day basis, the main contact will be the Lead Officer.

The post holder will perform the service under the terms of the contract, with a high standard of skill, care and diligence as practiced by professional persons and consulting firms performing services of a similar nature. In addition, and having due regard to the client's commitment to deliver and operate a high quality heritage project, the appointee shall give particular attention to, and is required to achieve, a high standard of quality in every aspect of the consultancy service.

6. Guidance:

- The Council will act on behalf of the WRGT and provide the Contractor with the contacts for the respective strands of work and contact details for the Lead Officer.
- Fees for the Contractor will be paid in instalments, with a percentage on signing and staged payments thereafter.
- Upon selection, an inception meeting will be arranged to agree terms and milestones between the Contractor with the Council's Lead Officer, WRGT and others to be agreed.
- The role will be home-based, however frequent attendance at the Council's offices for liaison with colleagues is anticipated. Access to a work station will be provided at the Council's offices in Shepton Mallet, as and when required.
- The role will involve minimal travel, though occasional meetings (e.g. possibly at HLF at their regional offices) may be required.
- Further details will be provided in a formal letter of agreement / contract with the Council.

6. Tender Requirements

You are invited to tender for this work.

Key dates:

- Tender responses to be submitted by email to Jane Sharp (jane.sharp@mendip.gov.uk) by 16.00 on **Thursday 23 February 2017**
- Meeting between potential contactor(s) and WRGT will be in **w/c 27 February 2017**
- Endorsement of appointment by the WRGT Committee in **w/c 6 March 2017**
- Endorsement of appointment by Cabinet on **Monday 13 March 2017**
- Start date provisionally scheduled for **Late March / April 2017**

Format of Tender:

Please submit a copy of your CV(s) together with a short supporting statement giving relevant examples of working with cultural heritage partners and funding bodies.

The short statement should address the following points:

- What is the Contractor's interest in applying to undertake this particular work
- How the Contractor may provide best value for the client (WRGT)

Please also provide the following information in the tender:

- Provision of contact details of two recent employers or clients either in the form of written advice from clients or details of clients who may be approached
- A schedule of time charges for principal consultants (and assistants if any).
- A schedule of disbursements.
- General company or personal information including:
 - Evidence of public liability and professional indemnity insurance, both to a minimum value of £1 million (i.e. name of insurer, reference number or copy of certificate)
 - HMRC Self-Employed unique tax reference number (UTR)
 - VAT registration number (if applicable).

Tenders will be assessed on the basis of:

Price/resources/ value for money	50%
Relevant experience/quality	50%
Understanding of the commission and assessment of the key issues.	
Performance and achievement reviews at project milestones	

Presentation and Interview

A presentation to the Trust and an interview will form part of the assessment process.

Budget

The budget for this work includes all expenses and travel disbursements.

All prices to be quoted exclusive of VAT.

7 Any Questions?

Please email your questions to Jane Sharp (jane.sharp@mendip.gov.uk) or phone 01749 341657.

8. Additional Information (see link at para 2 above)

- Bishop's Barn and Recreation Ground Options Appraisal (Benjamin and Beauchamp Architects, 2014) includes an archaeological assessment.
- Bishop's Barn and Recreation Ground Business Model (Christina Dixon Consulting, 2016) includes the recommendations going forward.

Jane Sharp, Shape Mendip Project and Improvement Officer

On behalf of Wells Recreation Ground Trust

23 January 2017