

**PROJECT MANAGER
CONSULTANCY SERVICES BRIEF**

TAVISTOCK TOWN COUNCIL

Brief for Project Management Services to deliver the Tavistock Town Council/Heritage Lottery Fund Guildhall WHS Gateway Centre on behalf of Tavistock Town Council

GENERAL

1. Introduction

- Tavistock Council has been successful with its Round 2 submission to the Heritage Lottery Fund (HLF) in connection with the provision of a Guildhall WHS Gateway Centre, which was supported by a range of local stakeholders including, in particular, the newly formed Tavistock Heritage Trust.
- The Council has previously been successful in a separate bid to HLF for a Townscape Heritage Initiative Scheme, which is in its fourth year.
- Within the Round 2 Gateway Centre bid the Council proposed to appoint consultants to lead various aspects of the next stage delivery process. First amongst these is the engagement of a resource to provide project management support for delivery of the Project and sufficient funds (up to £40,000) have been set aside (identified in the bid as 'delivery phase co-ordinator').

The Council now wishes to appoint at the earliest opportunity, applications from providers with relevant skills who have previous experience of the project are welcome. This Role Briefing should be read in conjunction with the accompanying Tender Response Form.

2. Background

- Tavistock Town Council acquired the former Magistrates Court and Police Station in 2014 (the Guildhall Complex) from the Devon Historic Buildings Trust. The building sits within:
 - a Conservation Area which was initially designated in 1972, extended in 1995 and then again in 2009 following the publication and adoption by both the Town and Borough Council of the Conservation Area Appraisal.
 - part of the Cornwall and West Devon Mining Landscape World Heritage Site (WHS).
- Tavistock retains a townscape of great interest because of its spacious streets, attractive town centre squares and prestigious 19th century buildings, many of which were built out of the greeny-grey Hurdwick Stone, which was quarried locally. The significance of the Guildhall complex, in addition to its imposing architecture and links to the ancient Tavistock Abbey, include its construction as England's first purpose built court and police station. It is grade 2* listed.

- With the support of the Heritage Lottery Fund the Town Council proposes to repair and restore the premises and bring them back into active use as a combined facility providing a 'gateway' centre for information and learning about the Mining WHS combined with council accommodation and a hub/facility for access to community services – restoring this iconic building to its historic place at the heart of community and civic life.
- Amongst others the Town Council works with, and as part of, a local partnership/community of interest called the Tavistock Heritage Advisory Forum (THAF) which includes other local authorities and partners as well as Tavistock Heritage Trust (THT) which has a shared role in the delivery of the proposed Heritage Gateway facility.
- Full details are attached in the documents referred to below.

3. Scope of the Project

The core documents supporting the project are available at <http://www.tavistock.gov.uk/index.php?page=tavistock-guildhall-whs-gateway-centre> . In particular the Round 2 application form to HLF and accompanying Business and Activity plans. These set out the main components of the Scheme proposals in relation to the overall range of services and activities which this appointment/engagement will co-ordinate in the delivery of the Project.

PROJECT MANAGER

4. Requirements of the Commission

The successful provider will serve as the primary Council contact with the Heritage Lottery Fund (HLF) and, in accepting the commission will work flexibly and undertake to meet the requirements of a timetable agreed with the Client. They will be responsible to the Client for securing compliance with the requirements of the Heritage Lottery Fund Guildhall WHS Gateway Centre Scheme, meeting Council requirements and informing associated planning, delivery, control, monitoring and review in order to deliver the project to time, quality and to budget.

This will include, inter alia, the information listed in the appended role profile included at Appendix 1. Because the Project is somewhat behind the original programme the first actions will be to review and update, in consultation with the Client and partners, the delivery plan, programme and associated information.

Appointed consultants will be expected by the Council to work extensively with stakeholders including, but not limited to:

- Tavistock Heritage Trust (delivery partner)
- Tavistock Heritage Advisory Forum
- West Devon Borough Council
- Devon County Council
- Tavistock & District Historical Society
- Tavistock Museum
- Tavistock & District Chamber of Commerce
- Tavistock BID Co
- The World Heritage Site Partnership
- Historic England
- Local Schools & the Learning Community.

Because the project involves delivery of a new project and project partnership it is necessary that any consultant appointed is able, inter alia, to dedicate sufficient resource, working with partners and building relationships, to be able to deliver a strong and sustainable partnership alongside the requirements of the scheme itself.

5. Instructions to Tenderers

The Client will be Tavistock Town Council.

Consultants are invited to tender for the commission by way of submitting a fixed fee proposal for the production of the required work.

The Council will proceed with the approach that offers best value. This means the lowest fee bid may not necessarily be successful as due regard will be given, alongside price to the quality of the tender, value for money, skills and experience/understanding of the brief and the proposed method for undertaking the work.

We shall be applying scoring criteria to assess tenders with up to 45% for value for money (including price); 40% quality/experience/methodology and 15% for added value (with a particular focus on ability to support Business/Activity Plan outputs and the project partnership).

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

It should be noted that some aspects of the consultancy work are expected to require significant engagement with professional communities of interest and/or partners.

The fixed fee bid should include all disbursements and expenses. Details are required of the daily rates of staff, proposed allocation of project staff days, and the allowances for expenses and all other anticipated disbursements based upon a project duration of in the order of 2 years. The consultant should also provide details of hourly rates for the supply of any additional or subsequent services to the initial commission and whether sub-contractors may be requested to be used.

The tender shall include details of any experience and qualifications of the consultant team members, including any sub-consultants or agencies that may be employed by the main consultant. A lead consultant contact must be clearly identified. It should also be noted that the lead consultant will not be allowed to sub-contract the whole or the majority of the commission without prior written consent. The Tender Response Form sets out the information which must be submitted with your application to Tender. An undertaking shall be given that the team allocated to the scheme shall remain constant, as far as is reasonably practical. A frequent turnover of staff involved with the scheme will not be acceptable. Consultants should describe in their tenders the approach that is proposed to be adopted in the execution of the commission.

A clear specification should be provided for any information that may be required from the client in order to undertake the commission. In applying for this role tenderers are confirming that they will be in a position to commence work within 2 weeks of appointment.

6. Programme

It is anticipated that the delivery stage (ie pursuant upon the appointment of the other supporting consultancies) will run in total for a period of approximately 2 years.

An indicative programme for appointment of this consultancy is:

| | |
|----------------------------------|---|
| Invitation to tender | 15 th June, 2018 |
| Tender submission | by 4.45pm on Friday 6 th July |
| Tender Assessment | Week commencing 9 th July |
| Interviews (if invited/required) | on 17 th July, 2018 |
| Appointment of consultant | Within 2 weeks of tender submission or interview (as applicable), |
| Inception meeting. | Within 2 weeks of appointment |
| Duration of contract evaluation. | In the order of 2 years – from project initiation to |

7. Selection of Consultant

Two copies of a written tender submission should be sent in a sealed envelope marked

“TENDER (PROJECT MANAGER - CONSULTANCY SERVICES) – TO BE OPENED BY THE ADDRESSEE ONLY” to the following address by **no later than 4.45pm on Friday 6th July, 2018.**

The Clerk and Responsible Finance Officer
Tavistock Town Council
Drake Road
Tavistock
DEVON
PL19 0AU

The tender submission shall be in the format of the accompanying Tender Response Form (a word version is available on request from info@tavistock.gov.uk).

Electronic tender submissions will not be accepted.

8. Fee

For guidance, the allocated budget for the commission is up to £40,000. This sum is inclusive of all disbursements and expenses, but excludes VAT. Fees and expenses will be paid in stages, to be agreed between the Client and the appointed Consultant(s).

9. Appointment

The appointment will be made by exchange of correspondence with the Council and shall be based on the Brief and the Consultant’s response to the Brief.

The Client may terminate the appointment at any time on payment of all the fees and expenses arising at the time of termination.

All research papers, reports, illustrative materials and project information will be passed to the Client, together with copyright on all documents and illustrations. The Consultant will be allowed to reproduce this material for reference purposes only.

It will be a condition of the appointment that the Consultant will hold the Client indemnified against any claims arising from the commission whether by neglect or otherwise, and that the Consultant should hold full Professional Indemnity Insurance.

Data Protection – the Client and Contractor shall both adhere to the requirements of the General Data Protection Regulation and, for the purposes of data arising in connection with the contract the contractor shall be a data processor subject to the Councils data protection policies.

For clarity the contract relates to work accompanying the delivery phase of the project. As such, and necessarily subject to the HLF completion date and project progress, the contract might involve working beyond 2 years.

10. Contact details

For further information during the tender period please contact:

Carl Hearn
Town Clerk and Responsible Finance Officer
Tavistock Town Council
Drake Road
Tavistock
PL19 0AU

01822 613529

carl.hearn@tavistock.gov.uk

11. Appendices

The Round 2 application and associated documents can be viewed at:

<http://www.tavistock.gov.uk/index.php?page=tavistock-guildhall-whs-gateway-centre>

APPENDIX 1

**TAVISTOCK GUILDHALL WHS GATEWAY CENTRE
PROJECT MANAGER ROLE PROFILE**

Terms and Timescale:

Contract type: Approx two year consultant assignment

Responsible to: Clerk to Tavistock Town Council (Project Leader)

1. Introduction

Tavistock Town Council is seeking to appoint a suitably-experienced consultant with a track record in coordinating the delivery of major HLF-funded capital/activity projects as part of its 'Guildhall WHS Gateway Centre' Project.

2. Background

The Guildhall WHS Gateway Project will redevelop the Grade II* listed Tavistock Guildhall to create a multi-purpose sustainable community venue which will celebrate the history

and heritage of this iconic range of buildings at the heart of Tavistock, and of its surrounding environment, making them accessible to people of all ages.

The project will achieve this by opening up public access to the Guildhall's historic courtroom and police cells, by providing a range of interpretive experiences within these spaces, by offering a new learning, volunteering and activities programme for people of all ages, and by making space available for events and community use outside of general public opening times. The ongoing Visitor Centre offer will be delivered and managed by our project delivery partner, Tavistock Heritage Trust.

Visitors will be able to explore and discover the fascinating history of the building and of Tavistock's wider heritage, which forms the eastern gateway to the Cornwall and West Devon Mining Landscape World Heritage Site (WHS). They will be able to participate in and enjoy a range of memorable and diverse activities and experiences.

There will also be a new 'one-stop-shop' for Council and other public services based in the Guildhall, providing convenient and easy access to a range of information and support.

The proposed provision by our delivery partner, Tavistock Heritage Trust, of a new visitor information service based initially in the former Tourist Information Centre adjacent to the Guildhall and then relocating into the Guildhall Complex will complement and further augment this range of public services and the Guildhall Visitor Centre offer.

The project will enable us to build on Tavistock's status as a prime tourist destination on the doorstep of Dartmoor National Park, and as the "urban jewel" in the Cornwall and West Devon Mining Landscape World Heritage Site, and make a significant and long-lasting contribution to heritage-led regeneration and learning in Tavistock.

The project is a key step in the implementation of strategic plans, for the Guildhall and for Tavistock's World Heritage, which have been developed over the last decade through extensive public consultation by a broad partnership of public, private and voluntary sector organisations.

The project, which has backing from all sections of the community, will build on existing HLF investment in the town through its Townscape Heritage Initiative Fund and return the Guildhall to its historic place at the heart of community and civic life in Tavistock.

Works are expected to start in 2018/19, with the redeveloped Guildhall expected to open to the public in 2020/2021.

3. Purpose of Role

This role is responsible for the overall coordination of the Tavistock Guildhall Gateway Project including of the capital, interpretation and activity elements to ensure that it delivers the approved purposes of the HLF grant and other project funding on time and on budget.

The Project Manager will be the central point of contact for the project delivery consultant team, Tavistock Town Council (TTC), Tavistock Heritage Trust (THT), and funders, and for any queries relating to the project.

4. Outline of Work

- i. Work with the Project Leader to devise and ensure that appropriate governance, decision-making and project management arrangements are in place and operate effectively to deliver project outputs and outcomes. Organise, attend and chair project delivery team meetings as necessary, take and issue minutes and secure actions.

- ii. Oversee, review and maintain the project's master programme and ensure it is on target for delivery and be familiar with the briefs for the delivery stage. To include review of changes to the programme, design or scope and implementation and advise the Client of any material changes in terms of key dates, financial viability, quality or function.
- iii. To be the first point of contact for the project with HLF (to include Project Monitor & Mentor) including associated reporting, administration, compliance and change control. Liaise with HLF to ensure that the project is on target to meet the approved purposes of the grant. Organise and participate in regular monitoring meetings with HLF.
- iv. To ensure that the Scheme delivers
 - o A robust basis for the delivery of the WHS Interpretation Centre and related outputs,
 - o Satisfactory restoration, repairs and enhancements to the Guildhall Complex according with HLF criteria, good building practice and good design principles.
- v. Attend Project Steering Group and periodic Council meetings providing summary monthly progress reports.
- vi. Monitor performance, provide instruction to, and coordination of, the consultant teams responsible for delivering the project's capital works and activities. This includes building works, interpretation/exhibition design, learning & participation and project evaluation. Support the Project Leader, Deputy Project Leader and Tavistock Heritage Trust (project delivery partner) in recruiting to these roles and managing performance against project objectives and outputs.
- vii. Liaise with TTC and THT's staff (in particular the Development Officer) to ensure coordination of those aspects of the project being managed/delivered in-house/by partners, and facilitate liaison between these teams and the project consultant team.
- viii. Attend project workstream meetings as necessary and report progress to the Council and Trust.
- ix. Ensure that the professional teams/partners record the progress of the project, including photographs, drawings and written accounts and comply with all necessary statutory and regulatory requirements, consents and standards required by the client, law and the Bid.
- x. Work closely with TTC and THT to ensure that the activity plan outputs and outcomes are delivered in accordance with the HLF Round Two application.
- xi. Liaise with TTC and THT on their project delivery communications and marketing plans to ensure that they appropriately target the project's target audiences and that the project's funders are suitably acknowledged.
- xii. Commission, recruit, monitor and manage the work of the project evaluation consultant.
- xiii. Coordinate work with TTC and THT to ensure that appropriate arrangements are in place to manage and maintain the project's outcomes after the construction phase.

- xiv. Monitor and review the project budget, develop cash flows and ensure that spend is controlled and on target. Identify pressures and recommend movement of budget between budget headings for approval by the Project Leader and funders. Validate all expenditure on the project for approval by the Project Leader.
- xv. Liaise with the Deputy Project Leader to recommend the award of the tender for the main build contract procurement process with HLF based on tender reports
- xvi. Manage and review the project's overall risk register. Identify issues and risks, propose and review mitigations to these, escalating as required for resolution.
- xvii. Complete and submit regular project update reports to funders, administer/maintain relevant records and undertake and process funding drawdowns.
- xviii. Check that consultants and partners are providing adequate and timely information appropriate for the delivery of the project and for the preparation of documentation and to meet funder requirements and perform to budget and specification.
- xix. To be accountable to the client and provide support and independent technical and professional advice on the delivery of all aspects of the scheme to client and funder requirements.
- xx. Such other duties as are consistent with the foregoing and commensurate with the delivery of the approved purposes of the HLF Funding Offer.

Person Specification

| 1. Work Experience | |
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| Essential | Desirable |
| <p>Significant experience of coordinating/managing the delivery of major externally-funded heritage capital redevelopment projects, specifically those supported by HLF funding, and involving sensitive/listed buildings.</p> <p>Commissioning, procuring, working with and managing consultant teams, including building, interpretation, activity plan delivery and heritage evaluation professionals.</p> <p>Capital and revenue budget management.</p> <p>Managing multiple tight and fixed deadlines.</p> <p>Programme management and project risk/issue management/mitigation.</p> <p>Writing and submitting HLF progress reports and grant drawdowns, and liaison with HLF project monitors.</p> | <p>Experience of managing local authority and charitable trust-led heritage projects.</p> <p>Experience of working with other major heritage project funders.</p> <p>Experience of proposing and setting up project governance and decision-making arrangements.</p> |
| 3. Qualifications | |
| Essential | Desirable |
| Educated to a minimum of degree level or | A professional qualification in project |

| equivalent. | management, building, construction or similar relevant discipline. |
|---|--|
| 4. Knowledge / Skills | |
| Essential | Desirable |
| <p>Excellent communication, interpersonal and organisational skills.</p> <p>Excellent written and spoken English, and a confident and persuasive communicator.</p> <p>Demonstrable knowledge of the practices, processes and operation of the first tier Council sector.</p> <p>Excellent numeracy and budget management skills.</p> <p>Pro-active, and capable of meeting tight and fixed deadlines.</p> <p>Broad awareness of the statutory consent requirements associated with undertaking works on a listed structure.</p> <p>Knowledge of business planning processes</p> <p>Knowledge of working in the heritage sector.</p> | <p>Knowledge of the WHS agenda.</p> |
| 5. Personal Attributes | |
| Essential | Desirable |
| <p>Enthusiasm and belief in the aims and objectives of the Tavistock Guildhall Gateway Project, and ability to convey this effectively to others.</p> <p>Ability to work on own initiative and to plan workload efficiently and effectively to meet tight and fixed project timescales.</p> <p>Ability to visit Tavistock frequently and/or be based in the Council offices.</p> | |

V4 June 2018