



## **CONSULTANCY SERVICES BRIEF**

### **Tavistock Town Council**

#### **Tavistock Guildhall Gateway Centre – Brief for Consultancy Services to Support a Stage 2 (Development Stage) submission for funding to the Heritage Lottery Fund**

##### 1. Introduction

- Tavistock Council has been successful with its Round 1 submission to the Heritage Lottery Fund (HLF) in connection with the provision of a Guildhall Gateway Centre which was supported by a range of local stakeholders including, in particular, the Townscape Heritage Partnership - now Tavistock Heritage which is delivery partner for the WHS Gateway Centre.
- The Council has previously been successful in a bid to HLF for a Townscape Heritage Initiative Scheme which is presently under way.
- Within the Round 1 Gateway Centre bid the Council proposed to appoint consultants to lead various aspects of the Round 2 bid process and sufficient funds have been set aside within the development phase for this purpose. This includes up to:-
  - £8,000 to carry out the Activity Plan Brief,
  - £2,000 for the Learning & Education aspect; and
  - £7,500 for Exhibition Design and Interpretation.

The Council now wishes to appoint those consultants at the earliest opportunity.

##### 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 19<sup>th</sup> 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 working with Tavistock Heritage providing a 'gateway' centre for information and learning about the Mining WHS combined with council offices and a hub for access to community services – restoring this iconic building to its historic place at the heart of community and civic life.
- Full details are attached in the documents referred to below.

### 3. Scope of the Project

- The core documents supporting the project are available at [www.tavistock.gov.uk](http://www.tavistock.gov.uk) . In particular 'Tavistock World Heritage Site Gateway Centre: Heritage Interpretation' and Tavistock Guildhall & Police Station Heritage Gateway Centre HLF Stage 1 Bid Summary'. These set out the main components of the proposals in relation to the consultancy services sought and provide the key related outputs.
- The intention is to move towards the appointment of the various consultants at the earliest opportunity in order to support delivery of the Round 2 bid process.

### 4. Requirements of the Commission

The work of the consultancy services sought is set out in more detail in the appended service briefs which should be read in conjunction with the Round 1 bid documents. All consultants working on the project are expected, inter alia, to work closely with one another and, in particular, the Development Phase Co-Ordinator.

Appointed consultants will be expected to engage extensively, as appropriate, with stakeholders including, but not limited to:

- Tavistock Heritage
- Tavistock Town Council
- West Devon Borough Council
- Devon County Council
- Tavistock and District Historical Society
- Tavistock Museum
- Tavistock and District Chamber of Commerce
- Tavistock Forward
- TaVi Network

- Tavistock BID Co
- The World Heritage Site Partnership
- The Devon Historic Buildings Trust
- English Heritage
- Local Schools and the Learning community.

In addition some of the roles involve the creation and stabilisation of new stakeholder groups such as sustainable future volunteer staffing resources and a heritage learning network. It is therefore necessary that consultants who are appointed are able to dedicate sufficient resource, working with local partners and building relationships, to be able to deliver the people based outputs appropriate to their briefs alongside the accompanying document based outputs.

All consultants are expected to liaise closely with colleagues working on the development phase and, in particular, the Town Council as the accountable body and Tavistock Heritage as delivery partner for the WHS Gateway Centre. This will include attendance at meetings to report on progress from time to time. The project communications organogram should be referred to for guidance.

## 5. Instructions to tenderers

The Client will be the Town Clerk of 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. Submissions may be made to undertake the work:-

- on an item by item basis; or
- for all three consultancy services or combinations.

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 40% for price and 50% quality/experience/methodology and 10% for added value.

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 consultation and engagement with stakeholders.

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. The consultant should also provide details of hourly rates for the supply of any additional or subsequent services to the initial commission.

The tender shall include details of the 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. 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.

Evidence should be provided to indicate the skills that will be available and exercised by the consultant in the execution of the commission and, in particular, evidence of the delivery of similar project outputs and sector knowledge previously.

An outline methodology should be included.

Experience and knowledge of the preparation of Heritage Lottery Fund bids or equivalent is essential and should be demonstrated.

Consultants should describe in their tenders the approach that is to be adopted in the execution of the commission including liaison with the client to report on progress. A clear specification should be provided for any information that may be required from the client in order to undertake the commission.

On conclusion of the commission the successful consultant shall submit 4 colour copies of any study documents, along with an electronic copy in a format agreed with the client.

## 6. Programme

It is anticipated that the development stage will run for a period of approximately 9 - 12 months and an indicative programme for the appointment and completion is:

Invitation to tender	25 <sup>th</sup> January, 2016
Tender submission	4.00pm, Thursday 18 <sup>th</sup> February, 2016
Interviews (if invited/required)	to be arranged if/as necessary
Appointment of consultant	Week commencing 29 <sup>th</sup> February, 2016
Inception meeting	Week commencing 7 <sup>th</sup> March, 2016
Duration of contract	The Round 2 bid is scheduled for submission in November, 2016 with a mid-point review in July. This programme

is indicative and may be subject to change.

7. Selection of Consultant

Two copies of a written tender submission should be sent in a sealed envelope marked **"TENDER (CONSULTANCY SERVICES) – TO BE OPENED BY THE ADDRESSEE ONLY"** to the following address by **no later than 16.00hrs on 18<sup>th</sup> FEBRUARY, 2016.**

The Town Clerk  
Tavistock Town Council  
Drake Road  
Tavistock  
PL19 0AU

Together with an electronic version to [carl.hearn@tavistock.gov.uk](mailto:carl.hearn@tavistock.gov.uk) by the same time and date.

8. Fee

For guidance, the budget for the commission is as listed above. 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 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 at the time of termination.

All research papers, reports and illustrative materials 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. The tender submission should evidence such insurance.

**For clarity the contract relates solely to work accompanying the development phase of the HLF programme.** Consequently where briefs refer to the delivery stage this information is included for information only.

10. Contact details

For further information during the tender period please contact:

Carl Hearn  
Town Clerk  
Tavistock Town Council  
Drake Road  
Tavistock  
PL19 0AU

01822 613529

[carl.hearn@tavistock.gov.uk](mailto:carl.hearn@tavistock.gov.uk)

11. Appendices

The following documents are enclosed – consultancy briefs for:

- Exhibition Design & Interpretation;
- Activity Plan;
- Learning & Education.



## **EXHIBITION DESIGN & INTERPRETATION PLAN SERVICES BRIEF**

The key aim for the Exhibition Design & Interpretation consultancy is to design and deliver a high quality exhibition for the new World Heritage Site Gateway Centre that will:

- Enhance the existing Tavistock town heritage experience
- Enhance the learning and educational potential of the WHS and meet the related requirements of a WHS 'gateway centre'
- Support the diversification of audiences for the museum and develop new audiences for the interpretation centre
- Encourage more people to learn about and enjoy the heritage of the local area and promote the Cornwall & West Devon WHS
- Be a flexible sustainable product which educates and informs

### **Specification**

It will be the role of the consultant to coordinate and deliver the design and production of the exhibition and interpretation plan, working closely with the Capital Design Team and Activity Team, meeting the development and delivery programme of the project.

### **Development Phase**

The consultant will be required in the Development phase to:

- In consultation with the principal stakeholders prepare a project Exhibition & Interpretation Plan for the Round 2 HLF bid submission describing the aims, audiences, themes and topics, objectives of the interpretation experience, how this is to be implemented, consideration of the site context and constraints and how the final scheme will be evaluated
- Carry out consultation with the Client and volunteers, existing and potential users and disability groups, working closely with the Activity Plan consultant, and evidence how you have used this consultation in the development of the exhibition and interpretation
- Contribute
  - to the meetings of the Activity Team, coordinating the design and delivery of the exhibition and interpretation plan through this team
  - information on the exhibition development and delivery to the required level of detail to the Capital Project Team via the Project Manager and attend meetings as required
  - as necessary to the development of the business plan

- Support the costing of the exhibition through providing sufficiently detailed information for the Quantity Surveyor and advise on preparing pricing documents for the main contractor / sub-contractor tenders
- Provide the Project Manager with a gantt chart illustrating the key activities and sequences for the design, procurement, fabrication and installation
- Develop and support Tavistock Heritage in its role as delivery partner for the WHS Gateway Centre.

**Delivery Phase** (for information only)

The consultation will be required in the Delivery phase to:

- Provide procurement of (in accordance with HLF guidelines), coordinate and support the production of exhibition content and learning materials, working closely with the Client, volunteers and staff, ensuring that content is of a high standard and delivers against the targets for accessibility
- Coordinate the delivery of the exhibition, on time and on budget, working closely with the Capital Project Team, Activity Team and main contractor / sub-contractors as required
- Regularly review programme and budget costs providing updates to the Project Manager for any significant changes
- Agree final accounts with suppliers and installers and provide approval for payment of invoices through the Project Manager



## **ACTIVITY PLAN CONSULTANCY SERVICES BRIEF**

The key aim for the Activity Plan consultancy is to deliver a high quality Activity Plan for the new World Heritage Site Gateway Centre based on the 'outline activity plan' prepared for and approved by HLF at stage 1.

### **Generally**

The consultant will be required to carry out consultation with the local community, local schools, our existing audiences and stakeholders, other industrial attractions and successful visitor attractions and the World Heritage Site office. This consultation will enable development of a programme of activities that will build and diversify our audiences, attract families, schools and visitors, encourage more people to volunteer and enjoy the heritage and create a sustainable future for the WHS Tavistock Guildhall Interpretation Centre.

Key aims of the Activity Plan are that:

- the activities are well managed and promoted
- the heritage is interpreted and explained, identified and recorded
- more people and a wider range of people will have engaged with the heritage and will have learnt about the heritage
- more people will have volunteered
- people will have developed skills
- people will have changed their attitudes and/or behaviours to heritage
- people will have had an enjoyable and memorable experience
- our local area / community will be a better place to live, work and visit
- our local economy will be boosted
- it will provide a sustainable future underpinned by a resilient model for community services

The main groups of people we have identified so far who will benefit from this project will be the local community, families and young people, teachers and school children, volunteers and visitors to Tavistock and the surrounding historic environs. In addition a review shall be undertaken of the range of other possible audiences who can be involved/engaged so as to make the greatest difference to the widest range of people. The review will include further consultation to assist in the clarification of target audiences and partners as well as ways of better engaging with both current and new audiences

The Activity Planning Consultant will be required, inter alia, to

- drive the work of the Activity Team to design an Activity Plan that delivers the widest benefits for people of all ages, backgrounds and levels of interest, for the local community and for visitors.

- work closely with the Interpretation Consultants to help develop a working theme which will attract audiences, get them to engage with the core offer, to value their experiences and contribute to focussing the interpretation programme.
- help the project identify its management objectives and its activity outcomes which will then inform the learning, training and volunteering outcomes to be delivered.

The delivery of the Activity Plan will be led by Tavistock Heritage and the Town Council and the Development Officer at the delivery stage and will be developed in consultation with relevant stakeholders.

### **Specification**

The Activity Planning consultant will be required to deliver an Activity Plan consistent with the approved 'Outline Activity Plan' which fulfils the requirements of the HLF Stage 2 (s6 Tavistock World Heritage Site Gateway Centre Heritage Interpretation refers) and includes:

- working locally to lead the Activity Team during the development phase of the project,
- working closely with the Client and volunteers to create the final Activity Plan for submission as part of the Round 2 HLF bid;
- Liaise closely with the Business Planning consultant to ensure that the Activity Plan is embedded within the Business Plan;
- Liaise closely with the Exhibition Design & Interpretation Planning consultant to ensure that the exhibition and Activity Plan are 'joined up';
- Design an evaluation framework;
- Liaise with other relevant parties, such as the World Heritage Site Partnership Office, and organisations / heritage sites in the development of the Activity Plan;
- Lead the consultation with key stakeholders, community groups, users / non-users, etc;
- Ensure that the Activity Plan reflects the aspirations and capacity of TH & TTC and provides appropriate outcome levels for the Round 2 HLF bid submission as set out in HLF guidance and the stage 1 submission;
- Work closely with local stakeholders and partners develop a volunteer staffing model under the guidance of 'Tavistock Heritage' to support the future staffing resource for the interpretation centre.

The Activity Plan should be based upon the 'Outline Activity Plan' (s6 Tavistock World Heritage Site Gateway Centre Heritage Interpretation refers) and include:

- Description of Gateway offer (briefly)
- Description of current operations
- Description of existing audiences and current activity
- Detailed plan of proposed activities and how they will be delivered
- Beneficiaries and target beneficiary numbers
- Analysis of how the project will involve people in the heritage and who these people will be
- Volunteer plan
- Learning plan
- Training plan
- Monitoring and evaluation

- Risk

Other required outputs referenced in the 'Outline Activity Plan' and which are to be delivered include, but are not limited to:

- Establishment of a local 'Learning Network' and associated educational support materials
- research strategy
- outline audience development strategy
- outline marketing plan
- detailed programme of heritage skills training
- a volunteer staffing model

Each strand of planned activity must detail audience targets and benefits, resources needed, associated costs, timetable for delivery, performance measures, methods of evaluation, and how the activity meets the Heritage Lottery Fund aims.

### **KNOWLEDGE, SKILLS & EXPERIENCE**

The successful consultant will be able to demonstrate, in their application, knowledge, skills and experience of:

- working with public and voluntary groups on projects involving the provision of learning, training and volunteering activities
- assessing the strengths and weaknesses of the activities currently being offered by an organisation and consulting with current and potential users and stakeholders as to what they do and do not value regarding those activities and the barriers to their being fully engaged in those activities.
- identifying the characteristics of current audiences and in particular potential new audiences for a new offer. A record of being able to identify which new audiences could be engaged and what they would need to feel involved in and benefit from the project.
- how to develop a strong theme which will engage and enthuse current and target audiences.
- developing and defining a project's objectives and learning outcomes.
- developing and implementing evaluation programmes/methodologies.



## **LEARNING & EDUCATION PLAN CONSULTANCY SERVICES BRIEF**

The key aim for the Learning & Education Plan consultancy is to deliver a high quality Learning Plan for the new World Heritage Site Gateway Centre based on the outline of learning activity and outcomes prepared for and approved by the Heritage Lottery Fund (HLF) at stage 1.

### **Generally**

The consultant will be required to carry out consultation with local learning providers, including local schools and the wider learning community, stakeholders and the World Heritage Site office. This consultation will enable development of/contribution to a Tavistock Heritage Learning Network and co-ordination of a programme of learning activity that will build and diversify our audiences and encourage more people to volunteer and enjoy the heritage and contribute to a sustainable future for the WHS Tavistock Guildhall Interpretation Centre.

Key aims of the Learning Plan are that:

- the activities are well managed and promoted
- the heritage is interpreted and explained
- more people and a wider range of people will have engaged with the heritage and will have learnt about the heritage
- more people will have volunteered
- people will have developed skills
- people will have changed their attitudes and/or behaviours to heritage
- people will have had an enjoyable and memorable experience
- our local area / community will be a better place to live, work and visit
- our local economy will be boosted
- it will provide a sustainable future and be more resilient

The main groups of people we have identified who will benefit from this project will be the local community, families and young people, teachers and school children, volunteers and visitors to Tavistock and the surrounding historic environs.

The Learning Planning Consultant will be required to design a Learning Plan that delivers the widest benefits for people of all ages, backgrounds and levels of interest, for the local community and for visitors.

The future delivery of the Learning Plan will be led by the Town Council and the Tavistock Heritage Learning Network at the delivery stage in consultation with relevant stakeholders.

## **Specification**

The Learning Plan consultant will be required to deliver a Learning Plan consistent with the approved HLF stage 1 documentation which includes:

- creation of a Tavistock Heritage Learning Network by working locally with the Activity Team during the development phase of the project, working closely with the Client and creating the final Learning Plan for submission as part of the Round 2 HLF bid
- Liaise closely with the Business Planning consultant to ensure that the Learning Plan is embedded within the Business Plan
- Liaise closely with the Exhibition Design & Interpretation Planning consultant to ensure that the Exhibition, Interpretation and Activity Plan are 'joined up' with the Learning Plan
- Liaise closely with Tavistock Heritage to coordinate and optimise input from its respective learning provider stakeholders

## **LEARNING PLAN CONSULTANCY SERVICES BRIEF**

- To develop a Learning Plan derived from the approved HLF stage 1 documentation and which fulfils the requirements of the HLF stage 2
- Create a Tavistock Heritage Learning Network through liaison with other relevant parties, such as local schools and colleges, Tavistock Heritage, the World Heritage Site Partnership Office, and organisations / heritage sites
- Lead the consultation with key stakeholders, community groups, users / non-users, etc.
- Ensure that the Learning Plan reflects the aspirations and capacity of TTC and provides appropriate outcome levels for the Round 2 HLF bid submission as set out in HLF guidance and the stage 1 submission

The Learning Plan should be based upon approved HLF stage 1 documentation and supporting documents (including, but not limited to the Tavistock World Heritage Site Key Centre Learning Strategy and the Guildhall Project Activity and Audience Review), and include

- Description of Gateway 'learning' offer (briefly)
- Description of current operations
- Description of existing audiences and current activity
- Detailed plan of proposed learning activities and how they will be delivered
- Beneficiaries and target beneficiary numbers
- Analysis of how the project will involve people in the heritage and who these people will be (including volunteers)
- Training plan
- Monitoring and evaluation
- Risk

Each strand of planned activity must detail audience targets and benefits, resources needed, associated costs, timetable for delivery, performance measures, methods of evaluation, and how the activity meets the Heritage Lottery Fund aims.

