

Treasures of Blanchland Project

Heritage Project Management & Fundraising Services

Tender Specification

March 2026



The Treasures of Blanchland Partnership, comprising Blanchland with Hunstanworth Parochial church Council (PCC) and Lord Crewe's Charity (LCC), invite tenders for the provision of Heritage Project Management Services. The successful applicant will manage the project's Development Phase, fundraise for and collate and write the application for the Delivery Phase, and then, if fundraising is successful, manage the consequent delivery phase of the project.

NB This specification should be read with the *General information to accompany all specifications for services* document, which together form the Tender Brief.

Heritage Project Management & Fundraising Services required:

1. Development Phase

- a. To manage the project on behalf of the partnership, ensuring delivery of all the agreed purposes in an open, sustainable, and timely fashion
- b. To support the partnership in reconsidering the development stage planning including the timeline, to ensure all aspects of the development stage focus on providing information to support a robust Heritage Fund Delivery Stage application
- c. To review, with the project board, the need for and deliverability of, some or all of the pilot activities currently planned for delivery during the development stage. If it is decided to continue with some/all pilot activities within the development phase, (rather than to incorporate them into the delivery phase), to procure consultants and contractors to deliver the activities during both the development and delivery stages, following Heritage Fund procurement criteria.
- d. To co-ordinate and complete all project reporting to the board, Diocese, permitting authorities, and to all funders as required in the funding agreements and permissions
- e. To manage procurement of development stage consultants, including drafting briefs for project board approval, and to administer fair and transparent procurements to Heritage Fund criteria. Consultant procurements likely to be required are:
 - i. Design Team led by a Conservation Accredited Architect for design, main contractor tendering and construction contract administration services, RIBA Stages 2 to 6 (services to include provision of a Conservation Management Plan and a Management & Maintenance Plan)
 - ii. Activity Planning Consultant with experience of the development of Area-Based* Activity Plans and associated partnerships
 - iii. Conservators for each of the Treasures



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LORD
CREWE'S
CHARITY

- books
- iron fireback
- stained glass
- embroidery
- carved woodwork
- altar ware
- grave stones

Services during development stage to include drafting of Conservation Plans for each. Conservation work itself to take place during delivery stage, after approval of the Conservation Plans via the Heritage Fund Delivery Stage application approval process.

- iv. Interpretation Consultant
- v. Evaluation Consultant
- vi. Events and Marketing Co-ordinator. Services to include audience development (identification of and liaison with new, diverse and under-served audiences as a priority) and market research in support of Activity Planning consultant, and delivery of Activity Plan during delivery stage.
- vii. Volunteers and Communications Co-ordinator (if not to be procured in Delivery Phase)
- viii. History Festival Co-ordinator (if not to be procured in Delivery Phase)
- ix. Website Consultant (if not to be procured in Delivery Phase)
- f. To co-ordinate and manage the consultant team on behalf of the project board, ensuring they follow good practice guidance from the National Lottery Heritage Fund, meet their deadlines in the Project Plan, and conditions of their contracts
- g. To co-ordinate the development of formal Partnership Agreements including
 - i. Partnership Agreement between LCC and PCC
 - ii. Partnership Agreement with Community Archaeology Partner (agreement to include provision of detailed Archaeology Strategy during the development stage). Delivery of the community archaeological activities to be carried out during the delivery stage, although some pilot activities may be carried out during the development stage.
 - iii. Partnership Agreement with Durham University
 - iv. Other Partnership Agreements as necessary for the area-based elements* of the Activity Plan
- h. To support the LCC and PCC as the organisations develop a viable and sustainable Treasures of Blanchland Partnership Business Plan (including an overall five -year income and expenditure forecast), reflecting each of the partners' updated internal organisational business plans. To co-ordinate with other consultants including the Design Team on future planned preventative maintenance costs and the Activity Planning consultant on the estimated income and expenditure forecast over the three-year Activity Plan.
- i. To support the LCC and PCC to develop a sound governance structure for the development and delivery of the project (feeding into their Partnership Agreement)



- j. To lead on and co-ordinate community and stakeholder engagement, in support of the partnership, liaising with the Activity Planning consultant on area-based initiatives
- k. To develop, update (where existing) and draft for inclusion in the Heritage Fund Delivery Stage application:
 - i. Project Plan (incorporating the elements below and others as necessary)
 - ii. Risk register
 - iii. Delivery timetable
 - iv. Project management structure
 - v. Procurement strategy
 - vi. Fundraising strategy
 - vii. Overall project cost plan (incorporating cost information from consultants including QS)
 - viii. Overall project cashflow (incorporating cost information from consultants including QS)
 - ix. Full cost recovery calculations for staff (if necessary)
 - x. Briefs for consultants and contractors
 - xi. Briefs for artists and crafts people for new commissioned works
 - xii. Volunteer strategy
 - xiii. Outline communications strategy
 - xiv. Job descriptions for staff recruitment (if necessary)
 - xv. Images
- l. To administer the submission of grant claims to funders, to manage consultant and contractor payments, and to co-ordinate VAT returns on behalf of the project board during the Development Phase.
- m. To lead on drafting and submitting fundraising applications for Delivery Phase match-funding,
- n. To facilitate the flow of information between the partners, project board, funders, consultants, stakeholders and contractors
- o. To coordinate and present the content for the National Lottery Heritage Fund Mid-Point Review Meeting
- p. To collate information from consultants and contractors, draft the full Delivery Phase funding application and gain partnership and project board approvals, for submission to the National Lottery Heritage Fund before 12 noon on the published date in May 2027 (unless otherwise agreed)
- q. To close down the Development Phase of the project in line with funders' requirements, and ensure project documentation is complete and filed
- r. To ensure the project continues to contribute positively to the community of Blanchland
- s. To embed the open and sustainable values inherent in the project throughout its duration.

*area-based elements: elements within the Activity Plan selected to follow Heritage Fund area-based action plan guidance <https://www.heritagefund.org.uk/funding/good-practice-guidance/area-based-projects>

2. Delivery Phase

- t. All relevant services from above, to be carried through to the Delivery Phase
- u. To support the board to re-appointment consultants and contractors as appropriate
- v. Following funding approval, to manage the Heritage Fund Permission to Start process on behalf of the project board
- w. To liaise with the Design Team on behalf of the project board during building contractor tendering, contract award and contract administration
- x. Ensure all funding is received and that VAT reclaims have been made (where possible) so that all project costs are covered by income
- y. To procure the following consultants and contractors (if not procured as part of Development Phase):
 - i. Legal services (if required for registration of Security)
 - ii. Volunteers and Communications Co-ordinator
 - iii. History Festival Co-ordinator
 - iv. Community Archaeology Co-ordinator (to delivery Archaeology Strategy in collaboration with Archaeology Partner)
 - v. Website Consultant
 - vi. Interpretation fit-out contractor(s) – manufacture and installation of interpretation items and materials
- z. Ensure smooth delivery of activities as the approved Activity Plan and ensure synchronisation with the capital and conservation works where required
- aa. To procure all contractors required to delivery the Activity Plan activities
- bb. To procure all artists and crafts people to design and create the new Treasures
- cc. Ensure the Delivery Phase project is fully delivered and completed, meeting the reporting requirements of funders, and permitting authorities.

Person Specification

Essential skills and experience:

- experience of successfully fundraising for and managing major Heritage Fund two-stage capital and community heritage projects
- public procurement legislation and best practice;
- consultant and contractor contracts;
- capital project, risk and financial management experience including grant claim management;
- co-ordination of multiple consultants;

Desirable skills and experience:

- supporting volunteer-based community organisations as they develop their own viable and sustainable long-term business plans for heritage assets

Insurance Requirements:

It is a legal requirement that all companies hold Employer's (Compulsory) Liability Insurance of £5 million as a minimum. * Please note this requirement is not applicable to Sole Traders.

Please confirm in your submission whether you already have, or will obtain prior to the



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commencement of the contract, the levels of insurance cover indicated below:

- Employer's Liability Insurance at £5million (where applicable)
- Public Liability Insurance at £2million
- Professional Indemnity Insurance at £2million

Timescales:

Development Phase contract: 31/03/2026 – 31/05/2027

Delivery Phase contract (expected): 30/09/2027 - 31/12/2029

Fee:

The Development Phase and Delivery Phase fees will be paid quarterly in arrears, unless otherwise agreed.

Submission of Tender:

Submission of tenders shall be no later than midday on the ...20th March 2026....., two weeks after the invitation to tender is published. The tender shall be delivered in PDF format by email to denise.herdman@mac.com

No claims will be considered if arising out of failure to study the details contained herein or to obtain such information, and no tender shall be conditional upon the availability of labour, equipment, offices or any other facilities required to be provided by the Consultant or contractors in the performance of the contract.

Tenders received after the date and time stated above, or not strictly in accordance with these instructions, may be disregarded.

Tenderers shall bear all their own costs and expenses incurred in the preparation and submission of the tender.

A site visit to inform the tender submission is strongly recommended, it will be considered positively during the tender assessment. Please contact **Denise Herdman** (denise.herdman@mac.com) in advance to arrange your visit.

If Tenderers have any queries or requests for further information, please contact

Denise Herdman . (denise.herdman@mac.com).....

No alterations or qualifications to any of the invitation to tender documents shall be made unless they have been notified in writing by the Treasures of Blanchland Partnership.

The Treasures of Blanchland Partnership does not bind itself to accept the lowest or any tender.

Tenderers shall treat the invitation to tender documents as confidential and restrict their circulation and distribution to a 'need to know' basis within the Tenderer's organisation / team.

Tenderers shall not disclose their tender in whole or in part to any third party prior to either the award of a contract by the Treasures of Blanchland Partnership or receipt of notification that the tender has not been accepted.

No tender, nor any part of it, shall be deemed to have been accepted unless such acceptance shall have been notified to the Tenderer in writing by the Treasures of Blanchland Partnership.

It is the Tenderers' responsibility to become familiar with the history of the Blanchland Abbey Projects, the work to be performed, contract conditions, location of work, programme and all other matters requiring consideration in order that the tender will be firm and comprehensive.

The chosen tenderer will be appointed under standard Newcastle Diocese terms and conditions.

Submission requirements:

Your submission should consist of the following:

1. A written response to the evaluation criteria
 - a. At least two but no more than four, case studies which demonstrate the tenderer's practical experience that is most relevant to the delivery and development of the Treasures of Blanchland Project, meeting the Person Specification requirements. Each case study should be no more than 500 words.
 - b. Short CVs for each team member summarising their individual experience, technical expertise and qualifications, and also confirming which of the case studies they have worked on. Each CV should be no more than 500 words
 - c. A description of your methodology explaining your approach to delivering the brief, no more than 500 words.
 - d. A signed statement confirming:
 - i. Your capacity to deliver against the brief,
 - ii. Your insurance requirements, and
 - iii. warranties as described in the General Information document.

2. A priced offer in the format requested.
 - a. Priced offer should provide fully for the requirements of the specification in the tender, else it must either absorb the costs of meeting the full requirements of the specification within its tendered price or withdraw the tender.
 - b. Priced offer should include all team members and be shown as lump sum fees separated between the development and delivery stage of the project.
 - c. Please include hourly rates for each team member for any additional works. (These rates will be considered when assessing the tenders)

Fees are to be shown exclusive of VAT.

Tender Evaluation Criteria:

Criterion Weighting	%
Appreciation of the task and context	30
Relevant experience and qualifications of team	30
Suitability of approach to delivering the brief	20
Contract value	20