

Treasures of Blanchland Project

Activity Plan Consultant

Tender Specification



August 2026

Role: Activity Plan Consultant

Location: Blanchland, Northumberland

Reporting to: Project Manager, Treasures of Blanchland Partnership

Contract: August 2026 – August 2027, with potential for reappointment for Delivery Phase

Introduction

The Treasures of Blanchland Partnership (TBP), comprising Blanchland with Hunstanworth Parochial church Council (PCC) and Lord Crewe's Charity (LCC), invite tenders for the provision of Activity Plan Consultant services. The successful consultant will provide Activity Planning services to the client to support the vision of the project in restoring Blanchland Abbey and surrounding grounds for the future as part of our National Lottery Funded Project, *The Treasures of Blanchland*. The successful consultant will:

- Develop a comprehensive Activity Plan aligned with NLHF requirements
- Lead community engagement and consultation activity
- Support and oversee delivery of selected Development Phase activities, including craft workshop(s) and community engagement initiatives

The appointment will align with the Development Phase programme to RIBA Stage 3. Treasures of Blanchland will reserve the right to reappoint the successful consultant during the Delivery Stage, subject to funding and performance.

The appointed consultant will work closely with the Design Team, Business Planning Consultant and TBP to ensure interpretation is integrated, viable and appropriate to the ecclesiastical setting.

This procurement is being conducted as an open, competitive process in accordance with National Lottery Heritage Fund procurement guidance and principles of fairness, transparency and value for money.

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

About Blanchland Abbey

Blanchland Abbey, founded in 1165, is a rare survival of a Premonstratensian monastic community, established in deliberate isolation at the edge of the North Pennine moors. The 'White Canons' who settled here lived a disciplined life of prayer, labour and contemplation, choosing this remote setting as a place of quiet devotion.

Built in a transitional Norman style, the abbey was laid out in the traditional monastic form, with a

church, cloister, chapter house, abbot's lodgings, and associated buildings arranged around a central courtyard. While much of the wider complex has been lost or repurposed over time, the Abbey Church of St Mary the Virgin survives as a powerful focal point within the village, retaining elements of the original 12th-century structure, whilst the broader footprint of the cloister survives in the surrounding built environment.

The present church is formed from the eastern end of the medieval abbey church, linked to the north transept. Over successive centuries it has been adapted and restored, resulting in a richly layered interior that brings together medieval, Georgian and Victorian craftsmanship. Among its most significant features is a striking 13th-century sedilia, alongside a carved circular Norman font, finely worked Jacobean chairs, and an unusual cast-iron Royal Coat of Arms of James I, repurposed from a fireback. Behind the altar is a fine medieval French embroidery. Fragments of medieval stained glass survive within the chancel, including a rare depiction of a Premonstratensian abbot at prayer, an intimate visual connection to the abbey's origins.

The site also offers glimpses into the ingenuity of its monastic past. During 19th-century restoration works, a system beneath the chancel was identified as a sophisticated drainage network; it is now more widely understood to have functioned as acoustic chambers, designed to amplify the voices of canons during sung worship.

Today, Blanchland Abbey Church is a Grade I listed building and the only site in the village open daily to the public, from dawn until dusk. An active Anglican Church, it remains under the care of local PCC volunteers and continues to serve both as a place of worship and as a welcoming heritage asset. The project's ambition builds on this legacy, seeking to strengthen the Abbey's role as a place of inclusive access, interpretation and sustainable hospitality for all visitors, regardless of background, belief or reason for visiting.

Project Overview

The Treasures of Blanchland Partnership is undertaking a two phase, circa £2.1M, 5 year project using citizen research, academic study, and skilled heritage conservation to unlock and share the mysteries of the Treasures of Blanchland, exploring the rich history of the village, and repair the fabric of the medieval Blanchland Abbey. This includes sensitive restoration, interpretation, and creating a sustainable future for the Grade I Abbey Church as a welcoming and distinctive heritage asset at the heart of the community.

The Treasures of Blanchland is the third phase of The Blanchland Abbey Projects - a community led heritage regeneration programme which the community began developing during 2017. The project has successfully achieved Development phase funding from the National Lottery Heritage Fund, alongside support from the Lord Crewe's Charitable Trust, amongst other funders.

The Treasures of Blanchland Partnership was formed to promote and safeguard the heritage of the village of Blanchland, particularly the Abbey Church, engaging the public in the stories of the medieval foundation to the modern day. As a vibrant place of gathering, worship, and broad community activity, the Treasures of Blanchland Partnership proposes to stabilize, conserve, and secure the long-term sustainability of the Abbey Church of St. Mary's, and its landscape, whilst protecting its historic significance within the village. A central element of the project is community and visitor engagement, ensuring that the heritage and legacy of the site are fully considered as part of its future use.

The development phase will take the whole project to end of RIBA Stages 3, comprising detailed plans for the re-ordering of the church, installation of appropriate heating, lighting and AV systems, creation of welfare facilities, insertion of chaplaincy and vestry spaces, and vibrant flexible

interpretation on the history of the abbey and the monastic community that created the village of Blanchland, both within and outside the Abbey itself. This is all supported by, and part of, a community archaeology and heritage project across the entire village.

Two previous projects were undertaken prior to securing funding from the National Lottery Heritage Fund (NLHF) for *Treasures of Blanchland*. These projects engaged the local community and conducted initial reports and investigations as part of the *Blanchland Resilient Heritage Project*, and the *6As of Blanchland*.

Work completed to date includes:

- Secondary desktop research into the history and heritage significance of the site
- A measured survey
- Archaeological trial investigations into the sub-floor of the Abbey, and externally to the West
- An initial structural condition report
- Initial architectural appraisal
- Acoustic Survey

(All reports will be made available to the appointed consultant, further information can be found in the General information for Briefs and Services).

Feasibility Study 2025

As part of feasibility work commissioned by TBP, Doonan Architects prepared a Quinquennial Inspection, Condition Report and Outline Cost Plan, which identifies work classed as immediate, urgent (within 18 months), necessary (within 5 years), and desirable. The estimated cost (May 2025 prices) for the repair/conservation of the existing fabric, and small extension accommodating toilets, kitchen, and interpretation, is in the region of £1.4 million.

The NLHF grant, now awarded, will enable further development work, towards submission of full delivery phase grant applications before August 2027.

As part of this phase, The Treasures of Blanchland Partnership is seeking to appoint a conservation accredited architect and design team members (where appropriate), to support the project, in advance of a further round of funding applications to support the capital delivery phase. The National Lottery Heritage Fund, and another funder/funders, will be part of this further capital phase.

The project will proceed as two phases, aligned with the funding application requirements of the NLHF:

Development Phase

- Design Team: RIBA Stages 0-3 including Planning Approval, Faculty Approval, and Listed Building Consent.
- TBP: fundraising for capital funding, community engagement
- The Quantity Surveyor will be appointed directly by TBP and will provide cost planning and cost management services throughout
- Other Consultants commissioned by TBP: business plan, interpretation, evaluation plan, activity plan

Delivery Phase

- Design Team: RIBA Stages 4-6
- TBP: delivering activities

Procurement Objectives

The Treasures of Blanchland Partnership (TBP) seeks to appoint a suitably experienced Activity Planning Consultant to:

- Develop a robust and deliverable Activity Plan
- Design and deliver a community engagement programme
- Oversee and support pilot activities and workshops
- Ensure strong alignment with:
 - Interpretation Strategy
 - Business Plan
 - Project vision and heritage objectives
- Support the preparation of a competitive NLHF Delivery Phase application

Project Team Composition

The Activity Planning Consultant will be appointed directly by TBP and will form part of the wider Project Team alongside:

- Architect-led Design Team (Lead Consultant)
- Business Planning Consultant
- Project Manager
- Quantity Surveyor
- Fundraising, interpretation and evaluation consultants
- Other consultants appointed by TBP, including access and specialist advisors

The successful consultant shall:

- Work collaboratively with all project partners to ensure alignment between costs, business plan and funding strategy
- Attend Project Team and Steering Group meetings as required
- Contribute to reporting to TBP, stakeholders and funders

Scope of Professional Services

We are seeking a consultant with a strong track record in heritage, cultural, or community projects, particularly those funded by the National Lottery Heritage Fund or similar programmes to work collaboratively as part of the wider Project Team.

For the purposes of this commission, the “Treasures of Blanchland” are understood to include:

- Medieval stained glass fragments
- The medieval embroidery behind the High Altar
- Significant historic features within the Abbey Church, including the 13th century sedilia, Norman font, Jacobean furnishings and Royal Coat of Arms
- Archaeological evidence of the monastic complex, both within the church and across the wider site
- The intangible heritage of the Premonstratensian community and the historic use of the Abbey as a place of worship and daily life
- The re-working of Blanchland by Bishop Lord Crewe, and the subsequent life of the village community

The Project Manager will oversee conservation of objects. The Interpretation consultant will provide advice on display and interpretation requirements and work with the project team and any appointed conservators as required.

The Activity Plan Consultant is asked to develop proposals for engaging ways to incorporate the

Treasures into the Activity planning.

The Activity Planning Consultant will provide both strategic development and practical delivery support.

Activity Plan Development

The Activity Plan should include outline proposals for events and programming, including consideration of a potential history festival and seasonal activities, to be developed further in the Delivery Phase.

The consultant will:

- Produce a complete NLHF-compliant Activity Plan, including:
 - Section 1: Current position and audiences
 - Section 2: Strategic approach to engagement
 - Section 3: Detailed Activity Plan and Action Plan
- Develop:
 - Activity programme across Development & Delivery Phases
 - Volunteer and participation strategy
 - Skills development opportunities
- Ensure alignment with:
 - NLHF Investment Principles
 - Project interpretation themes
 - Community needs
- The Activity Plan should include:
 - Clearly defined target audiences
 - Evaluation and monitoring framework
 - Outcomes and impact measures aligned with NLHF Investment Principles
 - Volunteer development and management approach
 - Staffing requirements for Delivery Phase activity delivery
 - Legacy and sustainability of activities beyond the funded period

Community Engagement and Consultation

The consultant will:

- Design and deliver a structured consultation programme, including:
 - Workshops
 - Interviews
 - Surveys
 - Focus groups
- Engage with:
 - Local residents
 - Volunteers
 - Schools and young people
 - Community groups
 - Visitors
- Build and maintain relationships with key stakeholders

Development Phase Activity Delivery

The consultant will support and oversee delivery of selected engagement activities. The consultant will not be expected to directly deliver all activities, but will design, coordinate and oversee delivery, working with specialist facilitators, volunteers and project partners where appropriate. These activities include:



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Craft Workshop(s)

- Design and oversee delivery of at least one heritage craft workshop
- Ensure alignment with:
 - conservation themes
 - traditional skills
 - interpretation of the Abbey

Community Activities

- Support and coordinate:
 - Community archaeology engagement activities
 - Heritage skills sessions
 - Public-facing events

Pilot Activities

- Test and evaluate potential Delivery Phase activities
- Gather feedback and learning to inform Activity Plan

Integration with Interpretation and Archaeology

The consultant will:

- Work closely with the Interpretation Consultant to:
 - integrate storytelling into activities
 - develop participation-led interpretation
- Integrate outputs from:
 - Archaeological work
 - Community research
- Ensure the church functions as:
 - a heritage hub
 - a centre for community activity

Collaboration and Coordination

The consultant will work with:

- Project Manager
- Business Planning Consultant
- Fundraising Consultant
- Architect-led Design Team
- Interpretation Consultant

To ensure:

- Activity Plan aligns with:
 - capital proposals
 - cost plan
 - operational model

In the Development Phase the appointee will be required to support development of the project to the end of RIBA Stage 3, ensuring that proposals are financially viable and aligned with National Lottery Heritage Fund Guidance.

The costs for all aspects of the project, across both development and delivery phases, including capital repairs and adaptation, professional fees and TBP staff costs, are estimated to be in the region of £2.1 million (incl VAT).

Integration and Coordination

The consultant will:



Work with QS and Design Team to:

- Align Activity Plan with capital cost plan

Support preparation of:

- NLHF Delivery Phase application

Methodology

Tenderers should clearly set out:

- Experience of developing NLHF Activity Plans
- Experience of community engagement in rural and/or heritage contexts
- Experience of working with:
 - volunteers
 - churches or historic buildings
- Approach to:
 - co-creation
 - inclusive engagement
 - practical delivery of activities

Development Phase Outputs

Treasures of Blanchland includes other outputs beyond the capital repair and restoration of the Abbey Church of St.Mary.

The following outputs are required to fulfil National Lottery Heritage Fund Approved Purposes for the development phase. Some of these outputs will be part of the Design Team scope of services, others will be commissioned by TBP or completed in-house.

- Project management structure (TBP)
- Project cash flow (TBP with input from Design Team and QS)
- Project timetable (TBP with input from Design Team)
- Detailed project cost breakdown (TBP/QS with input from Design Team)
- Buildings management and maintenance plan (Design Team)
- Community engagement and consultation process to inform design options and concept design (TBP & Design Team)
- RIBA Stage 3 Design Report including community engagement, outline specification, cost report, and environmental strategy (Design Team)
- Conservation Management Plan (Design Team)
- Confirmation of submission of Planning Application and relevant Faculty permissions (Design Team)
- Access Strategy (Design Team & TBP consultant commission)
- Interpretation proposals (TBP consultant commission)
- Evaluation plan (TBP consultant commission)
- Project activity plan (TBP consultant commission)
- Operational business plan (TBP consultant commission)

The Activity Plan Consultant will deliver:

- **Full Activity Plan**, compliant with NLHF requirements
- **Activity Action Plan**, including:
 - programme
 - budget
 - timelines
- **Consultation Report**



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- Documentation and evaluation of:
 - craft workshop(s)
 - pilot activities
- Provision of data, insight and learning from consultation and pilot activities to inform the project's Evaluation Framework (to be developed by a separately appointed Evaluation Consultant)
- Recommendations for Delivery Phase
- Contribution to NLHF application materials

Stakeholder Engagement

The Activity Planning Consultant should demonstrate:

- Ability to work collaboratively with community, client and stakeholders
- Experience in publicly funded or community-led projects
- Understanding of NLHF requirements

Tenderers should demonstrate previous experience of projects funded by the National Lottery Heritage Fund or comparable heritage funding programmes.

Tenderers should identify how they will support TBP in preparing information required for the NLHF Delivery Phase application and achieving Permission to Start for the Delivery Phase.

Programme

Completion date is currently targeted for June 2029. The table below shows proposed set of project milestones and dates, noting that these may be subject to change.

These dates are aligned to the programme for working through the NLHF grant application process. The appointment is divided into Phases 1&2 with a break clause, in case full funding is not achieved and the delivery phase cannot progress.

Project milestone	RIBA Plan of Work Stage	Date
Phase 1 - Development	RIBA Stages 0-3	
Confirmation of appointment of design team	0 Strategic Definition	End July 2026
Review of project documentation and initial site visit	1 Preparation and Briefing	August 2026
Stakeholder engagement and community consultations to identify design options, and to agree preferred option for development	1 Preparation and Briefing	September 2026
Concept Design development	2 Concept Design	Jan – Feb 2027
TBP - approval of concept design proposals & budget costs	2 Concept Design	February 2027
Design development & presentation of RIBA Stage 3 Design and Cost Reports	3 Spatial Co-ordination	March-April 2027



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TBP Phase RIBA Stage 3 approval and Sign-Off	3 Spatial Co-ordination	June 2027
Final Activity Plan: aligned with NLHF submission		Summer 2027
Break – Design Team ‘stand down’ until TBP receive Permission to Start delivery phase from funders		
TBP submit NLHF Delivery Phase funding application		August 2027
TBP receive Permission to Start from NLHF		November 2027
Phase 2 - Delivery	RIBA Stages 4-6	
Confirmation of approval to proceed to Stage 4	4 Technical Design	December 2027
Stakeholder engagement		Feb/March 2028
RIBA Stage 4 Design Complete	4 Technical Design Complete	March 2028
TBP approval of RIBA Stage 4 Design Report & pre-tender Cost Report update. Sign-off		March 2028
Preparation of tender documents and contract package		March-April 2028
Procurement of contractor*		April – May 2028
Construction Contract commencement	5 Manufacturing and Construction	July 2028
Handover and commissioning of systems including final certifications	6 Handover	April 2029
Client fit out (if necessary)		Jan – May 2029
Building opens - soft		June 2029
Building opens - official		TBC
TBP complete project evaluation	7 Use	End 2029
End of defects period and payment of retention	7 Use	July 2030

*All procurement must be carried out to best-practice standards to fulfil the criteria of public funding; competitive, fair and transparent, providing clear value for money.

Fee and Contract Arrangements

Payments will be made quarterly in arrears, based on progress against agreed milestones aligned to RIBA Stages.

The anticipated budget for this commission is £10,000 (excluding VAT), including all expenses.



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Project budget for consultation and community activities is outwith this fee.

Tenderers should propose a fee within this envelope, clearly demonstrating how their approach will deliver value for money and maximise fundraising outcomes.

Tenderers are required to submit:

- A lump sum fee for delivery of the Development Phase outputs required.
- A breakdown of fees by stage.
- A schedule of hourly rates and assumptions.

Fee proposals should be proportionate, deliverable and represent value for money within the context of a National Lottery Heritage Fund–supported project.

The Client reserves the right to seek clarification on any aspect of the fee submission.

The appointment will include a break clause at completion of RIBA Stage 3, with continuation to Delivery Phase (Stages 4–6) subject to:

- Securing of external funding; and
- Satisfactory performance of the appointed team during the Development Phase.

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 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

Tender Submission Requirements

Submission of tenders shall be no later than midday on the 28th August 2026, two weeks after the invitation to tender is published. The tender shall be delivered in PDF format by email to **enquiries@blanchland.org**

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, invoices 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.

If Tenderers have any queries or requests for further information, and to organize a site visit, please contact **Chris Ferguson** (enquiries@blanchland.org) in advance to arrange your visit. Clarification questions must be submitted by 26th August 2026.

Responses will be shared with all tenderers to ensure a fair and transparent process.

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 appointment will be based on RIBA professional services contract, incorporating Newcastle Diocese standard terms.

Tenders must remain valid for a period of 90 days from the submission deadline.

Tenderers must declare any actual or potential conflicts of interest in relation to this project or the Treasures of Blanchland Partnership.

Tenderers must not canvass or attempt to influence any member of the client or project team. Any such action may result in disqualification.

Tender Submission Requirements

Tenderers shall submit:

Quality Submission

- Understanding of the Brief
- Appreciation of heritage significance.
- Understanding of project objectives.
- Understanding of NLHF requirements.
- Methodology and proposed approach.
- Programme.
- Relevant Experience
- Two to four comparable case studies completed within the last ten years.
- Project Team
- Organisation chart.
- Roles and responsibilities.
- CVs of key personnel.
- References
- Details of any interviews, information, materials required from TBP

Commercial Submission

- Lump sum fee for Development Phase.
- An indicative fee or percentage fee for Delivery Phase services (RIBA Stages 4–6), expressed



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against the scale of services required. Breakdown by discipline.

- Schedule of hourly rates.
- Assumptions and exclusions.
- Backup arrangements if any of the allocated staff become unavailable to complete the work
- The project manager and lead contact (if different)
- The allocation of days between members of the team
- The daily charging rate of individual staff involved
- A timescale for completing the work and bid with key milestones

Please provide a table showing:

- costs including expenses; including and excluding VAT
- days allocated and day rate per employee including and excluding VAT
- any additional resource requirements

Tender Response Format

- Maximum 20 pages excluding CVs.
- Maximum 500 words per case study.
- Maximum 500 words methodology statement.
- Font size minimum 11pt.

Evaluation Criteria

Criterion	Weighting
Understanding of Brief and Project Context	20%
Activity Plan Methodology	25%
Relevant Experience and Team Capability	25%
Methodology & Approach	15%
Price and Value for Money	15%

Understanding of Brief

Assessment will include:

- Understanding of heritage significance.
- Understanding of ecclesiastical context.
- Understanding of NLHF requirements.
- Understanding of project risks.

Methodology

Assessment will include:

- Alignment with RIBA Stage 3 outputs and Delivery Phase requirements.
- Community engagement.
- Sustainability.
- Accessibility.
- Risk management.

Experience and Capability

Assessment will include:

- Comparable heritage projects.
- Ecclesiastical projects.



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- Listed building experience.
- Experience of NLHF-funded projects.
- Relevant qualifications and accreditation.

Price

Assessment will consider:

- Overall value for money.
- Resource allocation.
- Fee realism.
- Transparency of pricing.

Each criterion will be scored on a scale of 0–5:

0 = No response / unacceptable

1 = Poor

2 = Limited

3 = Satisfactory

4 = Good

5 = Excellent

Scores will be weighted according to the percentages given.

Interview Stage

TBP reserves the right to invite shortlisted tenderers to interview.

The interview score will contribute **20% of the total evaluation score**, with the remaining **80% derived from the written tender submission**.

Interview dates are provisionally anticipated w/c 20th July 2026.

Costs and Expenses

Applicants are solely responsible for their costs and expenses incurred in connection with the preparation and submission of the tender response, and any future stages of the selection, and evaluation process. Under no circumstances will TBP, or any of their advisers, be liable for any costs or expenses borne by the applicant or any of its advisers in this process.

Right to Reject and/or Disqualify

TBP reserves the right to reject or disqualify an applicant where:

- the response is submitted late, is incomplete, contains false or misleading information
- the application fails to meet TBP's submission requirements defined herein or as otherwise notified to applicants prior to the deadline for submission of the tender responses;
- the applicant is guilty of serious misrepresentation in relation to its application and/or the process.

Right to Revisit the Evaluation

TBP reserves the right to revisit the evaluation if after completion of the evaluation:

- new information emerges which gives TBP reason to doubt the basis of the original pre-qualification and shortlisting; or
- in relation to a consortium of applicants, a member of the consortium changes.

TBP also reserve the right at a later stage of this process to ask for evidence as to the claims made by and information provided by the applicants pursuant to this tender.

TBP reserves the right to:



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- cancel the tender process at any stage; and/or
- amend the terms and conditions of the tender process.

Data Protection

TBP, as a data controller, is committed to protecting your personal data. When you submit information in response to an invitation to tender this may include personal data, as defined in data protection law. We process this personal data for the purposes of evaluating submissions, creating contracts with the successful supplier and ensuring contract requirements are met.