

Friends of the North Pennines

Dukesfield Smelters and Carriers Project

Invitation to Tender for Heritage Project Management Services

Date: 27 March 2013

1. Introduction

The Friends of the North Pennines, a registered charity (FOTNP), has been awarded a Heritage Grant from the Heritage Lottery Fund (HLF) and supporting grants from other trusts to deliver a project centred on Dukesfield in rural Hexhamshire, Northumberland (grid reference NY 942580). The objectives of the project are to make a positive and enduring difference to our industrial heritage and the people who visit and care about it by

- revealing, consolidating and conserving the remains of the 18th century lead smelting mill on the banks of the Devil's Water river in Hexhamshire, Northumberland;
- tapping into voluntary enthusiasm to participate in a range of conservation and heritage activities centred on the site remains, and to research the lives of those who worked there and along the lead corridor between the North Pennines and Blaydon;
- stimulating the exploration and understanding of the lead routes between the North Pennines orefield and industrial Tyneside through a variety of interpretation and educational resources and events, connecting with other lead mining heritage sites, and by increasing awareness of a free public amenity accessible to all.

A 25 year lease of the Dukesfield site has been agreed with the landowner.

The planned project encompasses structural conservation of the lead smelt mill remains and a wide variety of related heritage activities delivering training, public events and interpretation products through a high level of volunteer participation with professional support.

- Conservation works, to be overseen by a conservation architect already appointed.
- The activities programme is estimated at around
 - £75,000 of direct costs including VAT and contingency
 - 840 volunteer days, valued at about £100,000 using HLF rates for skilled and unskilled participation
 - 14 training events
 - 75 learning events (including history talks, exhibition locations, community play productions) aiming to reach around 4,000 people
 - 16 products (including walks and cycle leaflets, a book, fixed interpretation boards, website with a wide range of content developed

primarily by volunteers) aiming to reach 6,000 people per year by the end of the project

- Governance and oversight by the Friends of the North Pennines through the Dukesfield Steering Group (DSG), and external evaluation amounting to around 85 days of voluntary time and £21,000 of cost.
- The number of additional grant providers is yet to be finalised, but there are likely to be four or five who will expect reports at the end of the project. One or two of them might additionally request interim updates.

The project is scheduled to run for two years and it is our intention to commence work in late Spring 2013. Many activities will take place in the Hexhamshire and Slaley area, with some located elsewhere between Allendale and Blaydon. DSG meetings are normally held in Hexhamshire or Slaley. A project timetable is attached as Appendix 3 to this document, which may be subject to change based upon the actual start date of the project. Currently it schedules tasks to the nearest month for overall planning purposes. Once the project commences the project manager will be expected to drive out the needed level of schedule detail to undertake the work and manage inter-dependencies.

Tenders are now sought for the position of project manager. Organisations or contractors may apply but should nominate a named individual as project manager.

2. Scope, responsibilities and required expertise and experience

Responsibilities:

- To deliver agreed outcomes within project plan timetable and budget, consistent with the spirit and objectives of the project;
- To co-ordinate the timetable and volunteer work, with adjustments as circumstances change;
- To develop and issue contract briefs and recommend contractor selections to the DSG;
- To firm up the detailed work packages as currently set out in Activity Plan Section 3, and the overall project timetable (with the Volunteer Events Co-ordinator) to the level needed to undertake the work;
- To manage delivery contracts;
- To control project finance, with support from the Friends of the North Pennines administrator;
- To set up a suitable web-based project control system to facilitate status reporting and communication with the steering group and other project participants;
- To prepare reports to each grant provider as required by them in terms of format and frequency, to be signed off by the FOTNP as the accountable body;
- To ensure compliance with the HLF guidance '*HG Managing Your Grant Delivery Phase*' available from http://www.hlf.org.uk/HowToApply/programmes/Pages/heritagegrants_pre

[April 2013.aspx#.ULB9tYcovg8](#) and any specific requirements of additional grant providers; and

- To co-ordinate provision of all services procured through this contract.

Expertise and experience:

- Proven track record of managing this kind of heritage and conservation project to time and budget
- Substantial experience of managing delivery of extensive programmes of activities through a varied team
- Skilled at using IT for project management, collaboration and electronic communication
- Managing HLF Heritage Grant funded projects (desirable)
- Experience of and enthusiasm for working with voluntary organisations
- Pro-active communicator with an aptitude for public engagement
- Skilled in dealing with a wide range of people (professional, volunteers, local community etc.)

Supporting information

Scope of work

The overall scope of the project is set out in section 3b of the grant application (Appendix 5) and sections 2 and 3 of the project activity plan (Appendix 2). An architect (Kevin Doonan Architects, Hexham) has been appointed to oversee the conservation work, including the administration of tendering for building contract(s). Because of the close linkages between several project activities and the structural conservation work, the project manager is expected to liaise closely with the architect to ensure delivery of the overall project plan.

Additional sub-contracts are required in order to complete specific activities requiring specialist professional support, including:

- Volunteer and event co-ordination
- Marketing and communications
- Website development
- Community archaeology
- Education
- Graphic design support across all media – leaflets, map, website imagery, identity and branding, fixed interpretation

Outline contract briefs for each of these contracts have been drafted and are given at Appendix 6. Others might be required in the course of the project. The DSG welcomes views on how these could be combined in the interests of efficiency and management simplicity. The project manager will be responsible for finalising and issuing the required contract briefs and will work with the DSG to manage the procurement of the contracted services consistent with the project timetable and in the manner required by the HLF. The first priority is to recruit a volunteer and events co-ordinator to assist with project mobilisation.

Other early needs based upon the timetable are for marketing and communications support. Procuring the first phase of community archaeology – a short and closely defined piece of work – is likely to be undertaken directly by the DSG, in the interests of time and continuity from the archaeological evaluation work carried out during the project’s development stage.

Project governance

The project manager will report to the FOTNP through the DSG and will be expected to work closely with the Friends of the North Pennines administrator. The overall project governance structure is as follows, and shown diagrammatically in Appendix 4:

- The Board of Trustees of the Friends of the North Pennines has ultimate responsibility for the project as the accountable body to the HLF.

The Board is responsible for

- reporting to funding bodies on progress and achievement of project and financial objectives, based upon input from the DSG
 - awarding any contracts to be let in the course of the project, based on recommendations from the DSG
 - authorising any changes to the project plan requiring agreement with funding bodies
 - financial control of the project: receiving grant awards and other income, and releasing approved payments in respect of project work
- The Board of Trustees has appointed a Dukesfield Steering Group with delegated terms of reference to oversee the project. It comprises
 - Three representatives of the Friends of the North Pennines,
 - Two Hexhamshire Parish Council nominees,
 - Two Slaley Parish Council nominees,
 - Another community member from Hexhamshire/Slaley.

The DSG:

- oversees project progress compared to the planned scope, timetable and cost. The project manager will attend DSG meetings to report and receive instruction. It is expected that the DSG will meet monthly during the delivery of the project, and will appoint a line manager for day-to-day contact with the project manager.
- reviews tenders and make contract award recommendations to the DSG under the terms of relevant grant awards. For the sub-contracts described in the ‘Scope of work’ section above the project manager will participate fully in making these recommendations.
- manages changes to agreed scope, activities and timetable and funding allocation:
 - approves any proposed changes that lie within grant award parameters
 - proposes any other changes to the DSG if necessary

- reports at regular intervals, based on project manager reports, to:
 - the Board of Trustees of the FOTNP
 - Parish Councils and community meetings

The Board and the DSG are supported by the Friends of the North Pennines administrator, who also has responsibility for administering and monitoring project grant and other receipts and disbursements. All payments require the signature of two of the Director-Trustees of FOTNP.

Project evaluation

Following standard HLF practice an experienced independent consultant will be recruited by the Steering Group 2 months before the conclusion of the project. The consultant will evaluate the project and produce a report following the *Evaluating your HLF project* guidance document for submission to the HLF no more than 4 weeks after the conclusion of the project. The project manager will be expected to

- have all relevant project documentation available to the evaluation consultant
- be available for interview by the evaluation consultant, along with other project team members as requested by the consultant.

The final 10% of Heritage Grants is not released until the Evaluation Report is submitted.

General

To support the responsibilities outlined above to provide project control, shared workspace, content repository and internal/volunteer communications, the project manager is expected to provide a suitable web-based system and to have this up and running within a month of the start of the project. A separate contract will be let to secure web designer services to develop an external facing project website once the project is underway, and to provide suitable training for the volunteers who will populate and manage content.

Bidders should be aware that, consistent with the HLF grant payment schedule, the contract will be subject to a 10% retention which will be paid on receipt of the last grant instalment from the HLF and subject to satisfactory performance of the contract.

The project timetable (see Appendix 3 to this document) means that the project manager's workload is likely to vary over the duration of the project but is not expected to require a full time commitment overall. Flexibility is therefore expected in accordance with the needs of the project. We need to understand what contingency arrangements you propose in the event of unforeseen unavailability for any extended period of time.

The successful candidate will be expected to work from their own premises with travel required to the Hexham area to oversee project activities and attend meetings as necessary.

3. Selection process and timetable.

Tenders are requested by 26 April 2013. Please set out

- Your proposed approach to providing the services required (organisation or contractor), working with the DSG and sub-contractors, and provision of a web-based project control system
- Full *curriculum vitae* giving qualifications, experience and credentials to provide the services as described in this contract brief
- Cost of services
 - Estimated number of days required to undertake the role as set out in this contract brief and supporting documentation on the scope and duration of the project
 - Daily rate exclusive of VAT
 - Cost of providing project system support exclusive of VAT
 - Elements of the work that will be subject to VAT
 - Proposed payment terms
 - Evidence of professional indemnity insurance cover
- Contact details of two clients willing to provide references regarding the provision of similar services. References will only be taken up for shortlisted bidders
- Normal working location(s)

The Friends of the North Pennines will shortlist candidates. Shortlisting will be based upon evidence of qualification to undertake the work and indicative value for money.

Interviews will be held on 8th May 2013, at a location in the Hexham area. The principal selection criteria will be assessment of ability to provide the required services, price, and ability to work productively with the rest of the project team in the spirit of the project's objectives. The Board of the Friends of the North Pennines reserves the right not to appoint. Referees will be contacted as part of the selection process.

The DSG is working with the HLF with the objective of achieving an approved start date of early to mid-May. It is intended to appoint the project manager immediately afterwards, to allow for a swift mobilisation of work thereafter.

Deadline for submissions

Prospective bidders are required to submit their tenders no later than 26 April 2013, electronically to: fotnp@hotmail.co.uk

Additional paper copies can optionally also be sent to

Friends of the North Pennines
Diana Denbury
Weardale Business Centre
The Old Coop Building
1 Martin Street
Stanhope
Bishop Auckland
DL13 2UY

Further information

For further information and an informal discussion about the project, consortia can contact the secretary of the DSG, Greg Finch, at gregpfinch@hotmail.com

4. Appendices

1. Friends of the North Pennines

The Friends of the North Pennines AONB and European Geopark (FOTNP) is a recently established charity (Charity Number 1137467, Company Number 7240526) aiming to:

- promote the conservation, protection and improvement of the physical and natural and built environment in and around the North Pennines Area, and in particular by conserving, protecting and improving the North Pennines AONB.
- advance the education of the public in the arts and sciences, in particular in relation to the conservation, protection and improvement of the physical and natural and built environment of the North Pennines Area, including the North Pennines AONB and other protected areas.

2. Project Activity Plan

3. Project Timetable

4. Project Governance and Management Structure

5. Heritage Grant application (second stage)

6. Draft Contract Briefs for additional work

- **Community archaeology (separate activities in 2013 and 2014)**
- **Environmental conservation (autumn 2013)**
- **Website development**
- **Graphic design**
- **Volunteer & events co-ordination**
- **Education**
- **Marketing & communications**