

CREATING A HERITAGE HUB FOR GUILDFORD PROJECT

Supporting Document: 6 [Part 1]

Project Strategy/ Construction Consultants' Briefs



HLF First Round Application

November 2014



Contents:

1.0 PROJECT PARTICULARS

- 1.1 Project title and location
- 1.2 Introduction
- 1.3 Project Objectives
- 1.4 Conservation plan
- 1.5 Current project status
- 1.6 The Employer & Employer's representative
- 1.7 Planning greener heritage projects
- 1.8 Proposed works contract

2.0 PROJECT MANAGEMENT PLANNING

- 2.1 Introduction
- 2.2 Project Organisation
- 2.3 Project Manager
- 2.4 Design Team
- 2.5 Project Working Groups
- 2.6 Design Stages/ Gateway Approvals

3.0 DESIGN STATEMENT

- 3.1 Site Strategy
- 3.2 Castle Ruins
- 3.3 Access Gallery; New Stair and Lift Building
- 3.4 Museum Exhibition Rooms
- 3.5 Learning & Activity Studio
- 3.6 Accessibility

4.0 ANTICIPATED COST/ BUDGET ESTIMATE

5.0 TARGET DATES

6.0 DESCRIPTION OF SERVICES

- 6.1 Conservation Architect/ Lead Consultant
- 6.2 Quantity Surveyor
- 6.3 Structural Engineer
- 6.4 Building Services Engineer
- 6.5 CDM Co-ordinator
- 6.6 Other Consultants who may be commissioned by the Employer

- Annex A:** Feasibility Stage: Drawings
- Annex B:** Feasibility Stage: Scope of Works
- Annex C:** Feasibility Stage: Budget Estimate

1.0 PROJECT PARTICULARS

1.1 Project title and location

Project Title: CREATING A HERITAGE HUB FOR GUILDFORD

Location: Guildford Museum, Castle Arch, Castle Hill, Guildford, Surrey, GU1 3SX

1.2 Introduction

Guildford Borough Council is preparing a second-round application to the Heritage Lottery Fund for the project "Creating a Heritage Hub for Guildford". This project will create a heritage quarter in the town and establish Guildford Castle and Museum as a united site and attraction at its heart. As part of this it will reconfigure Guildford Museum to open into the adjoining Castle Gardens, a site containing remains of a royal castle linked with medieval kings, including Stephen and Henry III, for over 300 years. The site was later associated with Lewis Carroll, who rented a house on the footprint of the historic castle for his sisters and who died in the house in 1898. It will protect and enhance remains, incorporating them into a new museum entrance and exhibition space and linking them to galleries. Refurbished displays will provide improved conditions for collections and use different formats and approaches to engage a range of audiences in the story of the town and borough, complemented by a new learning space and programme of activities and opportunities.

The project will unite places with a related history, increasing access to, and understanding of heritage assets including the castle, historic collections and the story of the town and borough that grew around it, producing a refreshed and enlivened museum and the major heritage hub and attraction for the borough's community and its visitors.

1.3 Project Objectives

The six principal objectives of the project are:

- To raise the contribution of Guildford's history and heritage to the town's life, vibrancy and sense of place by integrating and promoting its many heritage attractions within a heritage quarter
- To transform the heritage value and appeal of Guildford's castle and museum as the town's heritage hub: a focal point for the heritage quarter and a key community venue and primary visitor attraction
- To help protect and preserve the remains of the historic castle site and the Guildford Borough museum collections so that their heritage significance can be enjoyed by current and future generations
- To allow more and a wider range of people to access and experience the heritage assets
- To maximise the use of the castle and museum sites, buildings and collections as a source of learning and inspiration
- To increase opportunities for local people to be involved in the operation and development of the site and services

1.4 Conservation management plan

A Conservation Management Plan has been prepared which sets down the historic context, significance and policies for Guildford Castle and Museum (the heritage hub site) and is available as a download in PDF Format.

1.5 Current project status

The project is currently at Feasibility Stage [*RIBA Stage B+*] with documentation having been prepared to support a First Round Funding Application to the Heritage Lottery Fund.

In the first instance the design team will develop designs to RIBA Stage D+ with the view to supporting a Second Round HLF Funding Application. Then subject to HLF approval to the Second Round Application prepare designs for tendering, tender the works, deliver and complete the project.

1.6 The Employer & Employer's representative

"The Employer" under the terms of appointment is: Guildford Borough Council

The Employer's representative for the Project will be the Project Manager: TBC

1.7 Planning Greener Heritage Projects

Guildford Borough Council and the HLF are committed to furthering the objectives of sustainable development.

The HLF have published guidance on "Planning Greener Heritage Projects – February 2009" which outlines environmental impacts that are likely to be important on projects and what it might be possible to achieve.

The Guildford Heritage Hub design team need to carefully consider this guidance in the development of designs for the project and where possible offer responsive design solutions. This guidance document can be downloaded from the HLF's website.

1.8 Proposed works contract

The Design Team will be required to provide advice upon the procurement strategy for the works during the project's development phase. At this stage the form of works contract seems likely to be the JCT Intermediate Form of Contract – but this is only indicative at this stage.

2.0 PROJECT MANAGEMENT PLANNING

2.1 Introduction

This section outlines the project management/ governance framework for the Creating a Heritage Hub for Guildford project that will be developed during the next project stage [*HLF Development Phase*].

This Project Management Plan [PMP] is intended to provide a procedural framework for all aspects of the Creating a Heritage Hub for Guildford Project that will guide and assist the Guildford Borough Council and the project team in meeting the aims and objectives of the project. It will describe the parties to the project, their roles and responsibilities, lines of communication, project strategy and day to day management and operating processes.

It is intended that the PMP document remains 'live' and therefore should be subject to revision and amendment throughout the life of the project. Any proposed amendments should be communicated in writing to the Project Manager.

2.2 Project Organisation

In line with current best practice, a Project Board has been identified as the strategic decision-making body for delivery of the Guildford Heart of Heritage Project. Project Board will comprise:

- [REDACTED] Guildford Borough Council Heritage Manager [*Senior Responsible Owner*]
- [REDACTED]: Guildford Borough Council Strategic Head of Development [*Project Board Meetings Chair*]
- [REDACTED] Guildford Borough Council Lead Councillor for Development
- Representative TBC: GBC Senior Accountant
- Representative TBC: GBC Customer Operations & Communications Manager
- Representative TBC: GBC Asset Development
- Representative TBC: GBC Parks & Countryside

The Project Manager will report to the Project Board on behalf of the Design Team/ Working Groups, making recommendations for sign-off of design stages/project documents overseen/ prepared by the Design Team and Project Working Groups, and requesting any significant variations.

Attendance by the members of the Project Board is crucial to the progress of the project to programme. Key responsibilities of the Project Board are to:

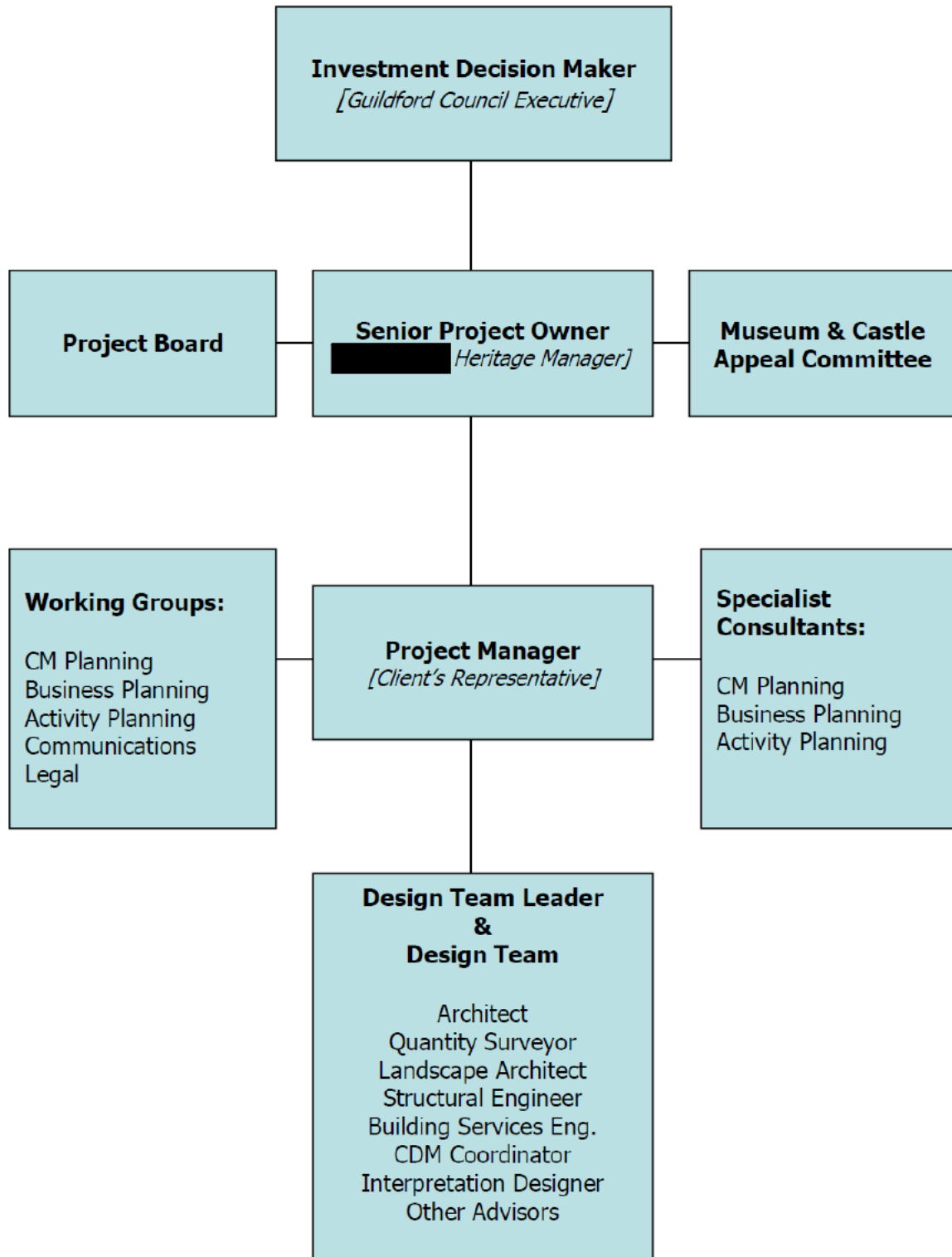
- maintain visible and sustained commitment to the vision and aims of the Creating a Heritage Hub for Guildford project, and to its delivery;
- ensure that the business case for the project remains valid;
- oversee the performance of the project in terms of cost, programme and quality;
- define the terms of reference for the Project Manager, Project Team and Project Working-Groups, and delegate appropriate authority;
- sign-off project development and delivery at key stages;
- authorise any departure from the project's aims and objectives and approve any significant variation to the project in terms of cost, programme and quality [*assessing the impact of any proposed changes on the business case and long-term sustainability of the Museum & Castle*].

The decisions of the Project Board are implemented by the Project Manager as the client representative of Guildford BC for the development and delivery of the Creating a Heritage Hub for Guildford project.

The Senior Responsible Owner: *[Heritage Manager: ██████████]* will provide a direct reporting link to the Guildford Borough Council Executive, and have overall individual responsibility for the delivery of the project.

The Project Board will meet once every quarter or more frequently when necessary.

The following chart reflects the organisational arrangement:



2.3 Project Manager

The Project Manager reports to Project Board and has day-to-day responsibility for ensuring that the vision and aims of the Project Board for the Creating a Heritage Hub for Guildford project are delivered by the Project Delivery Team [*Design Team & Working Groups*].

The Project Manager is the primary interface between Project Board and the Project Delivery Team, acting as the client's representative for the Creating a Heritage Hub for Guildford project.

Key responsibilities of the Project Manager include:

- Acting as the focal point of contact between the Senior Project Owner/Project Board and the Project Delivery Team (including attendance at Project Board meetings and preparation of regular Project Manager's reports);
- Ensuring that the Project Delivery Team receives decisions and instructions from the Project Board on time;
- Establishing project management systems and procedures that ensure the smooth running of the project and presenting them to Project Board for approval, and scrutinising their implementation;
- Advising the Client/Employer on appointments and fees and taking an active involvement in the appointment process;
- Monitoring and managing the performance of the project delivery team/ design team in the performance of their duties;
- Issuing and maintaining a log of change instructions to the Design Team, and advising the Client/Employer of any unforeseen changes to cost or programme recommending appropriate action and obtaining authorisation.
- Establishing appropriate channels of communication between the members of the project delivery team.
- Establishing, in conjunction with the consultants and the contractor a master programme to completion.
- Co-ordinating and supporting negotiations with planning authorities
- Co-ordinating the consultants using reasonable endeavours to secure the provision of information to the contractor in an appropriate timescale
- Checking and recommending consultants applications and all other invoices relating to the project for payment.
- Checking that the consultants fulfil their contractual obligations in assessing and dealing with extensions of time and the issuing of appropriate certificates.
- Providing advice and assistance as may reasonably be required in any disputes and proceedings that the client may have with other consultants or contractors.
- Checking that the consultants are providing adequate supervision in accordance with their terms of appointment and undertaking regular site inspections.
- Coordinating provision of reasonable information by the consultants to assist the Client/Employer in fundraising activities for the project.
- Preparing applications to the HLF for drawdown of grants.

2.4 Design Team

The Design Team overseen by the Project Manager will consist of the following consultants:

Lead Consultant/ Conservation Architect
Quantity Surveyor
Structural Engineer;
Building Services Engineer
CDM Co-ordinator

Their roles are summarised in section 6 of this document. The Design Team will be required to produce designs for the outline description of works identified in section 3 of this document.

Design Team meetings (chaired/minuted by the Lead Consultant/Conservation Architect) will be held monthly. The Project Manager will also attend Design Team meetings to monitor performance. Other client-side attendees will be invited as required/ have an open invitation to attend these meetings to ensure design progression is fully integrated with requirements emerging from the Conservation Plan; Business Plan; Activity Plan and Maintenance & Management Plan.

The Lead Consultant/Conservation Architect is responsible for all applications and negotiations for statutory consents *[including, listed building/ conservation area and planning consents; building and transport regulations; ecological licenses; and associated liaison with the local authority, highways authority, and Natural England]*.

2.5 Project Working Groups

Five Project Working Groups have been identified to oversee the updating/ preparation of the three key project plans informing design development and to oversee legal and communication matters.

- *Conservation Planning [CP];*
- *Business Planning [BP];*
- *Activity Planning [AP];*
- *Legal; &*
- *Communication*

Guildford Borough Council's Heritage Team are keen to have direct control in the preparation of the CP; BP; AP; and Maintenance & Management Plan *[M&MP]* but are appointing external specialist consultants in support.

The *Conservation Planning* Working Group has the following terms of reference:

- Prepares/ oversees any updating of the existing Conservation Plan and provision of the Maintenance & Management Plan.
- Ensure that the CP policies are understood and reflected in the development of designs for the works and considerations of the BP; AP and M&MP.
- Support the Design Team on satisfying planning, the HLF, and statutory bodies on matters related to heritage and archaeology, and to undertake best practice.

The *Business Planning* Working Group has the following terms of reference:

- Prepares/ oversees the development of the BP.
- Considers and advises on the BP impact of partnering opportunities.
- Advises on operational considerations, in connection with the management of the Museum and Castle.
- Reviews/ advises on learning and commercial opportunities offered by the Museum & Castle.
- Ensure that BP priorities are understood and reflected in the development of designs for the works and the considerations for the developing AP; CP; and M&MP.
- Prepares/ oversees the marketing strategy for the Museum & Castle.
- Resolves VAT issues surrounding the Creating a Heritage Hub for Guildford project.

The *Activity Planning* Working Group has the following terms of reference:

- Prepares/ oversees the development of the AP.
- Ensure that the AP proposals are understood and reflected in the development of designs for the works and considerations of the BP; CP; and M&MP.
- Develops partnering agreements with strategic partners.

The *Communications Working Group* has the following terms of reference:

- Prepares a public consultation strategy for the Creating a Heritage Hub for Guildford project proposals.
- Develops a media-relations strategy.
- Updates the Guildford Museum web-site with project progress information.
- Leads on-going communications with Community and other interested parties.

The *Legal Working Group* has the following terms of reference:

- Progress any emerging agreements required by the project.
- Oversee the legal framework of partnering agreements.
- Prepare/ advise on agreements in relation to major funders/ donors.
- Oversee any other legal agreements involving Guildford BC.

2.6 Design Stages/ Approval Gateways

The following tables summarises the gateway approvals process for the Guildford Museum & Castle Development Project:

<i>Gateway</i>	<i>Gateway scope to approval point</i>	<i>HLF deliverables</i>
	FEASIBILITY	
1	Outline business plan Stakeholder Consultations Conservation statement/ plan Activity plan framework/ outline Preliminary site assessments Project brief & organisation [RIBA Stages A-B] Initial cost plan/ budget estimate and risk register Project Timescale Fundraising Strategy HLF First Round submission	Pre-application form completed HLF First Round Application: <ul style="list-style-type: none"> • Completed application form • Business Plan brief • Activity Plan brief • Conservation Plan (update) brief • Maintenance & Management Plan brief • Feasibility Stage budget estimate/ cost plan • Strategic risk register • Development phase grant request
	DESIGN & PLANNING: OUTLINE - DETAILED	
2	Project management plan Outline programme Detailed business plan Key design team appointments Outline/ detailed design [RIBA Stages C-D] Project [CDM] file Developed cost plan [Outline] Develop procurement strategy Developed risk register Value management Conservation plan Activity plan Maintenance & management plan HLF Second Round submission	Development phase permission to start Complete regular project progress reports Complete development grant draw-downs HLF Stage 2 Application: <ul style="list-style-type: none"> • Completed application form • Conservation Plan • Activity Plan • Business Plan • Management & Maintenance Plan • RIBA Stage D designs

<i>Gateway</i>	<i>Gateway scope to approval point</i>	<i>HLF deliverables</i>
	DESIGN & PLANNING: DETAILED - TENDER	
3	Planning consents and approvals Detailed design/ production drawings [RIBA Stages E-G] BQs and detailed cost plan Developed programme Risk and value management Tender documentation [RIBA Stage H] Tendering Business case management Preferred contractor(s) & suppliers identified and advised Funding agreements in place	Delivery phase permission to start HLF Monitor liaison Project progress reports Grant draw-downs
	DELIVERY	
4	Guildford BC and HLF approval to start Appointment of contractor(s) and supplier(s) Detailed delivery programme Approved change control system Risk and value management Complete construction works Test reports and certificates Equipment/ facilities supporting information [O&M manuals] Defects list and resolution Handover report	Project Progress reports Grant draw-downs
	COMPLETION	
5	Completion certificate Signed-off defects list Signed-off project accounts Project evaluation report	Final Grant draw-down request HLF Completion & Evaluation Report [including summary maintenance table] On-going periodic reporting to HLF [1;5;&10YRS]

3.0 DESIGN STATEMENT

3.1 Site Strategy

The key strategic objective on the site is to re-orientate the approach to the museum buildings, connecting it to the castle site. The museum is currently difficult to understand and interpret in relation to the castle ruins, since it is approached only from Quarry Street and consequently the castle mound and ruins are hidden from access and view. Similarly, a visit to the Castle Gardens gives views, but no access, to the rear of the range of Museum buildings.

The site has a challenging cross-section east-to-west, with the land levels rising sharply behind the Quarry Street museum buildings. The design provides a new access route directly from the High Street heart of Guildford, along Chapel Street, bringing visitors first into the Castle grounds from the Castle Gardens' northern 19th-century gateway. The southern Castle Gardens gateway is also exploited to give access from Castle Cliffe and Castle Hill. From the Castle Gardens a new entrance will be created into the museum site.

Please refer to:

- The following Feasibility Stage: Drawings attached at [Annex A](#)

GMC/SU/01 Rev A: Site Plan
GMC/SU/02 Rev X: Existing Level E
GMC/SU/03 Rev A: Existing Level D
GMC/SU/04 Rev X: Existing Level C
GMC/SU/05 Rev A: Existing Level B
GMC/SU/07 Rev X: Existing Long Section
GMC/SU/08 Rev X: Existing Short Section

GMC/SK/20 Rev A: Proposed Site Plan
GMC/IM/01 Rev X: Section Visual through new spaces
GMC/SK/11 Rev D: Proposed Level B
GMC/SK/12 Rev D: Proposed Level C
GMC/SK/13 Rev D: Proposed Level D
GMC/SK/14 Rev E: Proposed Level E
GMC/SK/18 Rev A: Proposed Short Section AA
GMC/SK/19 Rev A: Proposed Short Section BB

- The Feasibility Stage: Scope of Works attached at Annex B

3.2 Castle Ruins

The existing ruined remains of the King's Chamber portion of the castle will be developed and extended to provide a new museum entrance and shop building, allowing visitors into the museum directly from the Castle Gardens. New landscaping around these ruins will create an open, paved-surfaced courtyard to provide a space for interpretation of the King's Chamber structures and make a new, focal public space at the museum side of Castle Gardens. Space will be made in the landscaping proposals for a new cafe kiosk near the new museum entrance to populate this edge of the Castle Gardens, bringing an active, public focus to the new approach to the museum.

Within the remaining masonry castle ruin walls of the Kings Chambers a new generous, double-height temporary Exhibitions gallery is proposed, roofing over this existing, ruined chamber while exposing its historic masonry, also becoming better protected from weather erosion. This will make these currently closed-off ruins accessible to visitors and enable their interpretation as interior space.

The design of this new gallery space makes a tall volume that allows understanding of the scale of the ruins and gives visitors a spatially thrilling introduction to the museum's stories. The new roof and its delicate, steel and timber supporting structure, use a language of materials and details that, while clearly contemporary, make reference to the historic timber structures now missing from the castle.

3.3 Access Gallery; New Stair and Lift Building

In the place of the recent strongroom building to the south end of the site a new, taller three-storey structure is proposed. This connects openly with the temporary exhibitions gallery and visitors leave the temporary exhibitions space to come into a light and open new top level here. Importantly a substantially-glazed southern elevation opens-up views across to Castle Cliffe, where the gardens represent the previously-excavated Edward I's chamber. For the first time this significant connection between Castle Cliffe and Castle Gardens is reinforced and interpreted.

Open views towards Lewis Carroll's house will enable this important Museum story to be introduced in the Access gallery before moving into the permanent Museum display rooms.

The Access Gallery at the top level of the New Stair and Lift building also provides a pivotal introductory space to enable the castle and museum themes to be interpreted, before using the new staircase or Lift to move downwards into the sequence of museum exhibition spaces within the historic rooms of the Castle Arch building.

The new Stair and Lift Building makes the essential physical transition between the Castle Gardens level and the original Museum permanent exhibition interiors, at last resolving the previously intractable separation between castle and museum.

3.4 Museum Exhibition Rooms

The historic detail and characteristics of the domestic-scale exhibition rooms within the Castle Arch building will be conserved and selectively stripped of their more recent, intrusive additions. The historic significance and context of the construction, detail and atmosphere of the exhibition rooms will be rediscovered through careful restoration and colour-schemes.

In the design of the exhibition fit-out the significance of the historic rooms will be re-presented by developing the exhibition design as 'furnishing' of the architectural space. Limited building-in of display will ensure that the rooms are not compromised and important details are not concealed. Some fine, existing free-standing display vitrines will be re-used, and a range of new, contemporary display devices will be brought in to sit delicately in these intimate historic interiors.

Currently the sequence of display rooms is difficult to relate to the Castle Arch building specifically and even more so to the site as a whole. Through the architectural conservation work and the installation of the new displays for the re-interpretation of the collection, the visitor will keep a sense of orientation and ability to relate the exhibition rooms to the wider site and castle context.

Window treatment to control day-light will open-up and maintain significant views out of the display spaces to experience moving through the displays in relation to the building's historic setting.

3.5 Learning & Activity Studios

Currently functioning with some difficulty as the entrance, shop, temporary exhibitions space and incorporating some permanent displays, the current 1911 gallery will be cleared of intrusive fit-out elements as the primary learning space. The space is generous, well-proportioned and, with the insertion of new sky-lights (an original feature now lost), and windows facing the castle site, will be well-lit. Two other spaces, a strong room and ground floor gallery, will also be cleared to provide complementary spaces to increase physical capacity, considerably for learning and activity.

The museum currently operates an off-site education/activity 'Victorian school-room' space for schools and other group activities which unfortunately prevents group visits experiencing the connection between their activity and the museum and castle as a whole. This activity will at last be brought to the Museum site, together with a resource space.

This scheme brings the learning/activity uses onto the museum & castle site so that groups can engage easily with the museum displays and with the interpretation of the castle site. The Learning & Activity Studios will have their own, dedicated entrance from Quarry Street, allowing group arrival not crossing-over with other visitors entering at the top of the site through the new castle-side

entrance building.

Groups will then be able to move through to the Castle Arch display rooms and up through the buildings toward the temporary exhibitions gallery, out to the Castle Gardens.

The Learning and Activity Studios will also have a new external activity terrace, facing east and out into the lower museum courtyard garden. This generates new activity use of this protected garden area, currently not accessible to visitors, and a better understanding of the topography of the site and its relationship to the castle mound.

3.6 Accessibility

The scheme unlocks the current separation of the museum from the castle by putting the museum entrance up onto the Castle Garden level (level 'E') and by replacing the strongroom building with an orientation and access building that takes visitors through the site's levels with a generous stair and lift.

Smaller accessibility barriers such as thresholds and minor steps between the public display rooms will be dealt with individually through ramped transitions and in some instances the widening of openings.

For the Learning & Activity Studio a platform lift will deal with the raised level from Quarry Street. Accessibility from the Studio to the exhibition rooms will be maintained as existing, using the historic staircase. For lift access visitors would use the external Castle Gardens route to re-enter the new entrance and shop building, giving access to the new lift via the Access Gallery. A new lift is also proposed to connect the learning and activity suite entrance level from Quarry street up to the new level C Victorian schoolroom space.

4.0 ANTICIPATED COST/ BUDGET ESTIMATE

The total construction budget for the Creating a Heritage Hub for Guildford project is reflected in the attached Budget Estimate No3 dated 10 July 2014 [\[Annex C\]](#) and summarised as follows:

Construction Works including Preliminaries =	2,780,000
Contingency allowance =	278,000
Allowance for increased costs [to 4th Qtr 2017] =	552,000
<hr/>	
Construction Works Budget = £	3,610,000
Fit-out provision [<i>Capital costs for loose fixtures and fittings; specialist equipment etc.</i>] including contingency and increased costs [to 4 th Qtr 2017] =	584,100
Interpretation provision [<i>Capital costs</i>] including contingency and increased costs [to 4 th Qtr 2017] =	233,640
<hr/>	
Capital Costs Total = £	4,427,740

5.0 TARGET DATES

The current target dates for the provision of services and works and parallel related activities are as follows:

HLF Development Phase:

<i>Design Development Milestones</i>	<i>Start</i>	<i>Finish</i>	<i>Comments</i>
Gateway 1: Feasibility and HLF First Round Submission	N/A	24/11/14	Gateway Approval achieved with HLF First Round Submission
HLF 1 st Round Assessment & Decision	25/11/14	18/03/15	
Gateway 2: Design & Planning: Outline - Detailed	19/03/15	09/16	Finish in preparation for an HLF Second round submission in 11/16 <i>[Exact date TBC]</i>
HLF permission to start	19/03/15	30/04/15	Assuming an HLF 1 st Round decision on 18/03/15
Design Team Procurement	04/05/15	21/09/15	Allowing for EU procurement timescales
Design development to RIBA Stage C	05/10/15	18/12/15	Allowing for mid-stage review and sign-off
Design development to RIBA Stage D	04/01/16	25/03/16	
Cost Planning	05/10/15	29/04/16	
Finalise HLF Application; Gateway review and sign-off	25/03/16	09/16	
Statutory consents	05/16	07/16	Minimum 8 weeks
HLF 2nd Round Application Assessment and Decision	11/16	03/17	Gateway Approval achieved on HLF Second Round Submission <i>[Exact date TBC]</i>

<i>Management & Maintenance Planning Milestones</i>	<i>Start</i>	<i>Finish</i>	<i>Comments</i>
Appointment of Management & Maintenance Planning Consultants	05/10/15	20/11/15	Appointment; inception meeting and review of existing project information
Prepare Management & Maintenance Plan	07/12/15	25/03/16	
Management & Maintenance Plan – Sign-off	25/03/16	09/16	

<i>Business Planning Milestones</i>	<i>Start</i>	<i>Finish</i>	<i>Comments</i>
Appointment of Business Planning Consultant	04/05/15	12/06/15	Appointment; inception meeting and review of existing/ previous consultations and project information
Research and preparation of draft Business Plan	15/06/15	30/10/15	
Consultation on the draft Business Plan	02/11/15	13/11/15	
Post-consultation amendment	16/11/15	27/11/15	
Integration period with Activity Plan; Conservation Plan; and Maintenance & Management Plan	30/12/15	25/03/16	
Business Plan – Sign-off	25/03/16	09/16	

<i>Activity Planning Milestones</i>	<i>Start</i>	<i>Finish</i>	<i>Comments</i>
Appointment of Activity Planning consultant	04/05/15	12/06/15	Appointment; inception meeting and review of existing/ previous consultations and project information
User/ non - user consultation period	15/06/15	30/10/15	
Comparator research	15/06/15	30/10/15	
Completion of interim report	02/11/15	27/11/15	
Integration period with Business Plan; Conservation Plan; and Maintenance & Management Plan	30/12/15	25/03/16	
Activity Plan – Sign-off	25/03/16	09/16	

HLF Delivery Phase:

<i>Design Development Milestones</i>	<i>Start</i>	<i>Finish</i>	<i>Comments</i>
Gateway 2: Design & Planning: Outline - Detailed and HLF Second Round Submission	N/A	09/16	
HLF 2nd Round Assessment & Decision	11/16	03/17	Gateway Approval achieved with HLF Second Round Submission
Gateway 3: Detailed Design & Planning: Detailed - Tender	03/17	12/17	Start subject to HLF Second Round success and approval to start. Finish on appointment of Contractor
HLF permission to start	03/17	04/17	Assuming an HLF 2nd Round decision in 03/17
Design development to RIBA Stage G & provision of Pre-tender Estimate	04/17	08/17	
Assimilation of tender documents	08/17	09/17	
Tendering & Analysis	09/17	12/17	Allowing 3 months assuming EU Procurement
Gateway 3 Review & Sign-off	12/17	12/17	
Gateway 4: Delivery	01/18	02/19	
Appoint Contractor & mobilisation	01/18	02/18	Allowing 6 weeks
Proposed date for commencement of Works	03/18	03/18	
Construction Period	03/18	02/19	Allowing 52 weeks
Proposed date for practical completion of works and handover	02/19	02/19	Issue of completion certificate
Gateway 5: Completion	02/19	02/20	
Snagging and preparation to open to the public	02/19	04/19	Allowing a 2 month lead in
Guildford Museum and Castle Project launch event and opening to the public	04/19	07/19	Target launch date Spring 2019
Making Good Defects sign-off and Project Evaluation	02/19	02/20	Assumes a 12 month maintenance/ defects period

6.0 DESCRIPTION OF SERVICES

6.1 Architect/ Lead Consultant

The Architect/ Lead Consultant will be responsible for:

- Acting as Lead Designers, including management and co-ordination of all design team activities
- Acting as designers for both building and landscape works
- Developing the project brief through all stages of the design, and reconcile this to the original, outline project brief
- Providing information for cost planning, and the preparation of cost estimates
- Preparing and submitting application for full planning permission, listed consent as appropriate.
- Co-operating with CDM Coordinator where applicable
- Preparing and submitting application for full planning permission, listed building consent as appropriate.
- Consulting statutory authorities on developed design proposals, preparing and making submissions under building acts and / or regulations or other statutory requirements
- Prepare and give building notice under the building acts or regulations.
- Co-operating with CDM Coordinator where applicable.
- Providing information as required by the Employer and Project Manager in order to obtain Project Board/ Employer approval to type of construction, quality of materials, and standard of workmanship.
- Advising on consequences of any changes on cost and programme
- Preparing adequate information for statutory, tender and construction purposes to meet the project and contractor's programme.
- Acting as the Contract Administrator under the building contract, diligently performing all duties of the Contract administrator under the contract within the required timescales, including dealing with claims under the contract.
- Providing the Employer and Project Manager with advice and assistance as may reasonably be required in any disputes and proceeding that the client may have with the contractors.
- Monitoring that all construction work is completed in accordance with the issued design information, and control the quality of the works, taking appropriate remedial action as necessary.
- Providing reasonable information as required by the Employer and Project Manager to assist the Client in fundraising activities for the project.
- Providing information for and assistance in the preparation of the HLF Second Round application.
- Visiting horticultural nurseries to ascertain the quantity, quality and cost of stock available for purchase
- Providing guidance on future maintenance

6.2 Quantity Surveyor

The Quantity Surveyor will be responsible for:

- Preparing initial budget estimates from feasibility proposals
- Preparing and developing the preliminary cost plan
- Monitoring cost implications during design stage
- Maintaining and developing the cost plan, and preparing periodic cost reports and updated cash flow forecasts
- Providing cost information for submissions for grant draw down from the various funders.
- Advising on and implementing tendering and contractual arrangements
- Agreeing valuations periodically with the contractor and recommending interim payments
- Prepare the final account.
- Cost control
- Providing general cost advice during the contract for the purposes of submitting/approving Client changes

- Providing reasonable information as required by the Client and Project Manager to assist the Client in fundraising activities for the project.
- Providing the Client with advice and assistance as may reasonably be required in any disputes and proceedings that the client may have with the contractors.

6.3 Structural Engineer

The Structural and Civil Engineer will be responsible for:

- Developing the design for the Structural and Civil design through all the stages of the design process, in collaboration with the lead consultant.
- Liaising with the Lead Consultant and other consultants to ensure co-ordination of Structural and Civil design within project design
- Providing information for cost planning, and the preparation of cost estimates
- Preparing adequate information for statutory, tender and construction purposes to meet the project and contractor's programme
- Site inspection and witnessing of the Structural and Civil installations to control the quality of the installation.

6.4 Building Services Engineer

The Buildings Services Engineer will be responsible for:

- Developing the design for Building Services through all the stages of the design process, in collaboration with the lead consultant.
- Liaising with the Lead Consultant and other consultants to ensure co-ordination of Building Services design within project design
- Providing, in consultation with the QS, budgetary advice and information and assessments of contractors' valuations.
- Preparing adequate information for statutory, tender and construction purposes to meet the project and contractor's programme
- Examination of contractor's proposals for compliance with the required performance criteria and co-ordination with the project design.
- Site inspection and witnessing of Building Services installations to control the quality of the installation taking appropriate measures as required.

6.5 CDM Co-ordinator

The CDM Coordinator will be responsible for:

- Ensuring, so far as practicable, that enough attention is paid to health and safety by the designers in their duties under the CDM regulations, particularly in respect of risk reduction and or elimination and Health & Safety generally.
- Preparing a Health & Safety Plan prior to the appointment of a Principal Contractor.
- Providing advice where requested on the competency of designers and contractors.
- Providing advice in respect of the Principal Contractor's response to the H&S Plan.
- Notifying the HSE of the project.
- Monitoring that the H&S File is adequately prepared and handed over to the Client upon completion of the project.
- Deliver Health and Safety File to the Client at practical completion and advise on secure storage and future use.
- Other items as required under the CDM regulations

6.6 Other Consultants who may be commissioned by the Employer

With the advice of the Design Team the following specialist advice/ investigations are anticipated during design development from RIBA Stage B+ to Stage D:

- Measured Survey
- Asbestos Survey
- Buried Services Survey
- Ecological Survey
- Paint Analysis
- Trial pits/ archaeological project
- Timber Survey
- Environmental Survey
- Lighting Designer
- Exhibition/ Interpretation Designer
- Graphic designer
- Lighting designer

Project Planning Activities that will be developing in parallel and integrated with the design are:

- An Activity Plan including Interpretation planning
- A Business Plan
- A Management & Maintenance Plan

Note: A Conservation Plan has already been prepared and recently updated.

Feasibility Stage Drawings: Annex A

Feasibility Stage Scope of Works: Annex B

Feasibility Stage Budget Estimate: Annex C

CREATING A HERITAGE HUB FOR GUILDFORD PROJECT

Supporting Document: 6 [Part 2]

Other Specialist Consultants' Briefs



HLF First Round Application

November 2014

Contents:

1. Brief for [Access Planning](#) consultancy support
2. Brief for [Activity Planning](#) consultancy support
3. Brief for [Archaeologist](#)
4. Brief for [Business Planning](#) consultancy support
5. Brief for [Fundraising](#) consultancy support
6. Brief for [Management & Maintenance Planning](#) consultancy support
7. Brief for [Exhibition and Interpretation Designer](#)

Brief for **Access Planning** consultancy support for Guildford Borough Council

Introduction

Guildford Borough Council is preparing a second-round application to the Heritage Lottery Fund for the project "Creating a Heritage Hub for Guildford". This project will create a heritage quarter in the town and establish Guildford Castle and Museum as a united site and attraction at its heart. As part of this it will reconfigure Guildford Museum to open into the adjoining Castle Gardens, a site containing remains of a royal castle linked with medieval kings, including Stephen and Henry III, for over 300 years. The site was later associated with Lewis Carroll, who rented a house on the footprint of the historic castle for his sisters and who died in the house in 1898. It will protect and enhance remains, incorporating them into a new museum entrance and exhibition space and linking them to galleries. Refurbished displays will provide improved conditions for collections and use different formats and approaches to engage a range of audiences in the story of the town and borough, complemented by a new learning space and programme of activities and opportunities.

The project will unite places with a related history, increasing access to, and understanding of heritage assets including the castle, historic collections and the story of the town and borough that grew around it, producing a refreshed and enlivened museum and the major heritage hub and attraction for the borough's community and its visitors.

The objectives of the project are:

1. To raise the contribution of Guildford's history and heritage to the town's life, vibrancy and sense of place by integrating and promoting its many heritage attractions within a heritage quarter
2. To transform the heritage value and appeal of Guildford's castle and museum as the town's heritage hub: a focal point for the heritage quarter and a key community venue and primary visitor attraction.
3. To help protect and preserve the remains of the historic castle site and the Guildford Borough museum collections so that their heritage significance can be enjoyed by current and future generations
4. To allow more and a wider range of people to access and experience the heritage assets
5. To maximise the use of the castle and museum sites, buildings and collections as a source of learning and inspiration
6. To increase opportunities for local people to be involved in the operation and development of the site and service

Purpose

To support Guildford Borough Council's Heritage Team in developing Guildford Castle and Museum as an inclusive site and visitor attraction as part of the Creating a Heritage Hub for Guildford project.

Objective

The consultant will be required to contribute specialist expertise and knowledge to the Heritage Team to ensure project plans meet the needs of the widest possible audience, focusing, particularly, on physical access into and circulation within the refurbished site and the inclusiveness of interpretation methods and material. The consultant will need to work with Guildford Borough Council's Heritage team, the architect and other contractors to ensure a co-ordinated and complementary approach to planning spaces and displays that will increase visitors' enjoyment of the heritage, their understanding of the buildings, stories and collections within and encourage them to explore the site and displays further.

Tasks

Guildford Borough Council is preparing a second-round application to the Heritage Lottery Fund for the project "Creating a Heritage Hub for Guildford". This project will create a heritage quarter in the town and establish Guildford Castle and Museum as a united site and attraction at its heart. As part of this it will reconfigure Guildford Museum to open into the adjoining Castle Gardens, a site containing remains of a royal castle linked with medieval kings, including Stephen and Henry III, for over 300 years. The site was later associated with Lewis Carroll, who rented a house on the footprint of the historic castle for his sisters and who died in the house in 1898. It will protect and enhance remains, incorporating them into a new museum entrance and exhibition space and linking them to galleries. Refurbished displays will provide improved conditions for collections and use different formats and approaches to engage a range of audiences in the story of the town and borough, complemented by a new learning space and programme of activities and opportunities.

The project will unite places with a related history, increasing access to, and understanding of heritage assets including the castle, historic collections and the story of the town and borough that grew around it, producing a refreshed and enlivened museum and the major heritage hub and attraction for the borough's community and its visitors.

The objectives of the project are:

1. To raise the contribution of Guildford's history and heritage to the town's life, vibrancy and sense of place by integrating and promoting its many heritage attractions within a heritage quarter
2. To transform the heritage value and appeal of Guildford's castle and museum as the town's heritage hub: a focal point for the heritage quarter and a key community venue and primary visitor attraction.
3. To help protect and preserve the remains of the historic castle site and the Guildford Borough museum collections so that their heritage significance can be enjoyed by current and future generations
4. To allow more and a wider range of people to access and experience the heritage assets
5. To maximise the use of the castle and museum sites, buildings and collections as a source of learning and inspiration
6. To increase opportunities for local people to be involved in the operation and development of the site and service

Review plans and proposals for the site, identifying possible issues and making recommendations for solutions and improvements that will remove or minimise physical barriers to access, exceeding part M Building Regulations wherever possible.

Provide input into the Activity Planning / Interpretation working group and related plans, assisting in ensuring exhibition and interpretation proposals are inclusive and advising on improvements to extend audiences where possible.

Advise and assist in planning consultation with the deaf and the disabled to ensure the involvement of potential users within this target group can be gathered and used to develop an inclusive site and services.

Attend meetings as required including preparing and making presentations

Provide information necessary for submission to funding bodies as required

Timing

Development phase is March 2015 until November 2016– as reflected in Access Planning Milestones below:

<i>Access Planning Milestones</i>	<i>Start</i>	<i>Finish</i>	<i>Comments</i>
Appointment of Access Planning Consultant	06/04/15	01/06/15	
Access Plan preparation and	01/06/15	04/04/16	

integration with Activity Plan			
Access Planning sign-off	25/04/16	12/16	

Budget

£8,000

Dimensions

The Consultant can occasionally work at Guildford Museum.

The day-to-day contact for the project will be through the Creating a Heritage Hub for Guildford Project Manager.

The Access consultancy will be managed by a Working Group [Advisory/ Focus Group] comprising:

- [REDACTED] Guildford Borough Council Heritage Manager
- [REDACTED] Guildford BC Customer Operations & Communications Manager
- Guildford Heart of Heritage Project Manager
- Others: TBC

All information gained through this project will be the ownership of Guildford Borough Council.

Resource material

HLF Round 1 Application dated November 2014.

Guildford Borough Council operating information and visitor research

Heritage service access documents and equality impact assessment

Invitation to tender

Candidates are required to submit:

- Details of suitability for the work and approach.
- A detailed timetable and who is responsible for each element and number of days work proposed.
- A fee proposal. The amount of VAT must be identified separately within the proposal costs.
- The names and CVs of the Access consultant and any others to be involved in the work
- References from previous work of a similar nature.

Selection criteria: Consultant/s will be chosen on the basis of the following:

- Your understanding of the brief and your approach to addressing the tasks identified.
- Experience of researching and developing access plans – of comparable nature/ subject matter.
- Experience in undertaking all the tasks identified.
- Experience of Heritage Lottery Fund funding applications.
- Satisfactory references.
- Your fee proposal.

Responses are requested by week ending 22 May 2015.

For further information please contact [REDACTED] Guildford Borough Council Heritage Manager on 01483 444[REDACTED] or at [REDACTED] guildford.gov.uk

Brief for **Activity Planning** consultancy support for Guildford Borough Council

Introduction

Guildford Borough Council is preparing a second-round application to the Heritage Lottery Fund for the project "Creating a Heritage Hub for Guildford". This project will create a heritage quarter in the town and establish Guildford Castle and Museum as a united site and attraction at its heart. As part of this it will reconfigure Guildford Museum to open into the adjoining Castle Gardens, a site containing remains of a royal castle linked with medieval kings, including Stephen and Henry III, for over 300 years. The site was later associated with Lewis Carroll, who rented a house on the footprint of the historic castle for his sisters and who died in the house in 1898. It will protect and enhance remains, incorporating them into a new museum entrance and exhibition space and linking them to galleries. Refurbished displays will provide improved conditions for collections and use different formats and approaches to engage a range of audiences in the story of the town and borough, complemented by a new learning space and programme of activities and opportunities.

The project will unite places with a related history, increasing access to, and understanding of heritage assets including the castle, historic collections and the story of the town and borough that grew around it, producing a refreshed and enlivened museum and the major heritage hub and attraction for the borough's community and its visitors.

The objectives of the project are:

1. To raise the contribution of Guildford's history and heritage to the town's life, vibrancy and sense of place by integrating and promoting its many heritage attractions within a heritage quarter
2. To transform the heritage value and appeal of Guildford's castle and museum as the town's heritage hub: a focal point for the heritage quarter and a key community venue and primary visitor attraction.
3. To help protect and preserve the remains of the historic castle site and the Guildford Borough museum collections so that their heritage significance can be enjoyed by current and future generations
4. To allow more and a wider range of people to access and experience the heritage assets
5. To maximise the use of the castle and museum sites, buildings and collections as a source of learning and inspiration
6. To increase opportunities for local people to be involved in the operation and development of the site and service

Purpose

To support Guildford Borough Council's Heritage Team in developing Guildford Castle and Museum as an inclusive site and visitor attraction as part of the Creating a Heritage Hub for Guildford project.

Objective

The consultant will be required to work alongside the team in developing an Activity Plan and action plan that will increase the range of audiences participating and engaging with the heritage on the Guildford Castle and Museum site, be ambitious in providing a broad range of activities and projects, while ensuring feasibility of proposals, and fulfilling the requirements of the second-round Heritage Lottery Fund application. The content should cover a broad range of participation activity including displays and temporary exhibitions, programmes of events and activities, learning opportunities, engagement opportunities and training opportunities. The consultant will need to work closely with Guildford Borough Council's Heritage team, the architect and other contractors to ensure a coordinated and complementary approach to planning displays and activities that will increase visitors'

enjoyment of the heritage, their understanding of the buildings, stories and collections within and encourage them to explore the site and displays further.

Tasks

Assist the project team in reviewing existing audiences and developing a better understanding of potential audiences for the new development.

Assist the team in developing consultation programmes that will involve and engage existing and potential target audiences, defining and exploring their interests and expectations of the development and informing project plans.

Work with the Heritage team to trial displays and activities with target groups, undertaking evaluation and gathering feedback to inform development of plans.

Review the current range of activities and engagement opportunities to develop a baseline of information, identify level of success and interest and suggest areas for development.

Assist in developing aims and objectives for future audience learning and engagement.

Support the team in developing a lively and appealing range of activities that will develop audiences and offer learning, engagement, training and participation opportunities to a wide range of audiences, both during and following project delivery.

Assist in developing proposals to deliver training and personal development opportunities to those within the community, including internships, placements and structured and informal volunteering programmes.

Provide information for the Heritage Lottery Fund, in line with the requirements of the second-round application, including an explanation of how the activity plan meets project aims, HLF outcomes and increases audiences. Provide additional information as required for applications to other grant providers and Trusts and Foundations.

Assist in developing an accurate action plan and costs.

Advise on best practice in community engagement, education and current curriculum developments

Attend meetings as required including preparing and making presentations

Work with existing contacts, stakeholders and partners in developing plan

Timing

Development phase is March 2015 until November 2016– as reflected in Activity Planning milestones below:

<i>Activity Planning Milestones</i>	<i>Start</i>	<i>Finish</i>	<i>Comments</i>
Appointment of Activity Planning Consultant	06/04/15	01/06/15	Appointment; inception meeting and review of existing/ previous consultations and project information
User / non user consultation period	01/06/15	31/08/15	
Comparator research	01/06/15	31/08/15	
Completion of interim report	01/09/15	02/10/15	
Integration with Business Plan, Conservation Plan and Exhibition and Interpretation Strategy	05/10/15	29/01/16	
Activity Plan – Sign-off	29/01/16	11/16	

Budget

£15,000

Dimensions

The Consultant can work occasionally at Guildford Museum.

The day-to-day contact for the project will be through the Creating a Heritage Hub for Guildford Project Manager.

The production of the Activity Plan will be managed by a Working Group [Advisory/ Focus Group] comprising:

- [REDACTED] Guildford Borough Council Heritage Manager
- [REDACTED] Guildford Borough Council Exhibitions and Audience Development Officer
- [REDACTED] Guildford BC Customer Operations & Communications Manager
- Guildford Heart of Heritage Project Manager
- Others: TBC

All information gained through this project will be the ownership of Guildford Borough Council.

Resource material

HLF Round 1 Application dated November 2014

Guildford Museum Audience Development Plan, 2006

Guildford Museum redevelopment project: A Summary of Audience Information, 2013

Invitation to tender

Candidates are required to submit:

- Details of suitability for the work and approach.
- Details of what work you would propose to undertake and work you would anticipate being undertaken by Guildford Borough Council under your direction/ guidance, in the supporting role identified.
- A detailed timetable and who is responsible for each element and number of days work proposed.
- A fee proposal. The amount of VAT must be identified separately within the proposal costs.
- The names and CVs of the consultant and any others to be involved in the work
- References from previous work of a similar nature.

Selection criteria: Consultant/s will be chosen on the basis of the following:

- Your understanding of the brief and your approach to addressing the tasks identified.
- Experience of researching and developing activity plans – of comparable nature/ subject matter.
- Experience in undertaking all the tasks identified.
- Experience of Heritage Lottery Fund funding applications.
- Satisfactory references.
- Your fee proposal.

Responses are requested by week ending 20 September 2013.

For further information please contact [REDACTED] Guildford Borough Council Heritage Manager on 01483 444 [REDACTED] or at [REDACTED] guildford.gov.uk

Brief for **Archaeologist**

Introduction

Guildford Borough Council is preparing a second-round application to the Heritage Lottery Fund for the project "Creating a Heritage Hub for Guildford". This project will create a heritage quarter in the town and establish Guildford Castle and Museum as a united site and attraction at its heart. As part of this it will reconfigure Guildford Museum to open into the adjoining Castle Gardens, a site containing remains of a royal castle linked with medieval kings, including Stephen and Henry III, for over 300 years. The site was later associated with Lewis Carroll, who rented a house on the footprint of the historic castle for his sisters and who died in the house in 1898. It will protect and enhance remains, incorporating them into a new museum entrance and exhibition space and linking them to galleries. Refurbished displays will provide improved conditions for collections and use different formats and approaches to engage a range of audiences in the story of the town and borough, complemented by a new learning space and programme of activities and opportunities.

The project will unite places with a related history, increasing access to, and understanding of heritage assets including the castle, historic collections and the story of the town and borough that grew around it, producing a refreshed and enlivened museum and the major heritage hub and attraction for the borough's community and its visitors.

The objectives of the project are:

1. To raise the contribution of Guildford's history and heritage to the town's life, vibrancy and sense of place by integrating and promoting its many heritage attractions within a heritage quarter
2. To transform the heritage value and appeal of Guildford's castle and museum as the town's heritage hub: a focal point for the heritage quarter and a key community venue and primary visitor attraction.
3. To help protect and preserve the remains of the historic castle site and the Guildford Borough museum collections so that their heritage significance can be enjoyed by current and future generations
4. To allow more and a wider range of people to access and experience the heritage assets
5. To maximise the use of the castle and museum sites, buildings and collections as a source of learning and inspiration
6. To increase opportunities for local people to be involved in the operation and development of the site and service

Purpose

Develop a plan for a community archaeology project as part of the Creating a Heritage Hub for Guildford project, providing a major contribution to the vitality and appeal of the activity plan while providing all investigations required for relevant planning applications and consents.

Objective

The consultant will be required to develop and deliver a community archaeology project that will:

1. provide information to help refine and develop the Conservation Plan for the site
2. ensure that all archaeological impacts as a result of the development works have an appropriate archaeological response that provides full mitigation.
3. Develop an improved understanding of the development and character of Guildford Castle to enable better and more coherent interpretation of the castle and museum
4. Create a high profile project that will provide opportunities to widen public participation in exploring and understanding the local heritage and foster public appreciation and understanding of the interest and value of Guildford Castle

Tasks

Produce a plan for the delivery of a community archaeology project for Guildford Castle, based on capital works and information and consents required for the Creating a Heritage Hub for Guildford project

Design investigations to provide a full and proper record of all elements of the archaeology that will be disturbed or compromised by the development

Plan and implement the processing and analysis of excavation finds, providing and publishing a written excavation report

Devise a range of public engagement activities to attract and involve a range of target audiences in the archaeological work and the project

Develop opportunities for experienced and inexperienced volunteers to become involved in the project, including providing training in basic excavation skills and opportunities for those with prior experience to play an active part in the work

Contribute to the production of related resource material, such as handouts for the general public and schools to spread awareness of the works and its findings

Plan a programme of promotional activities during the project, for example giving talks, producing displays and booklets and providing information for social media updates, in order to attract the interest of the public and keep the local community informed of progress

Timing

Development phase is March 2015 until November 2016– as reflected in Milestones below:

<i>Exhibition and Interpretation Planning Milestones</i>	<i>Start</i>	<i>Finish</i>	<i>Comments</i>
Appointment of Archaeological Consultant	06/04/15	01/06/15	
Prepare excavation and community involvement strategy	01/06/15	28/09/15	
Integration with 2 nd -round HLF application and sign-off	28/09/15	11/16	

Budget

£20,000

Dimensions

The Consultant can occasionally work at Guildford Museum.

The day-to-day contact for the project will be through the Creating a Heritage Hub for Guildford Project Manager.

The production of the Community Archaeology Plan will be managed by a Working Group [Advisory/ Focus Group] comprising:

- [REDACTED] Guildford Borough Council Heritage Manager
- [REDACTED] Guildford Borough Council Collections Officer
- [REDACTED] Guildford BC Customer Operations & Communications Manager
- Guildford Heart of Heritage Project Manager
- Others: TBC

All information gained through this project will be the ownership of Guildford Borough Council.

Resource material

HLF Round 1 Application dated November 2014.
2009 Conservation management Plan.
Guildford Castle and Guildford Palace excavation reports.

Invitation to tender

Candidates are required to submit:

- Details of suitability for the work and approach.
- A proposal for the community engagement programme including details of the different audience groups to be targeted and how activities will attract them and address their need
- A detailed timetable and who is responsible for each element and number of days work proposed.
- A fee proposal. The amount of VAT must be identified separately within the proposal costs.
- The names and CVs of the team involved in the work
- References from previous work of a similar nature.

Selection criteria: Consultant/s will be chosen on the basis of the following:

- Your understanding of the brief and your approach to addressing the tasks identified.
- Experience of researching and developing archaeological projects– of comparable nature/ subject matter.
- Experience in undertaking all the tasks identified.
- Experience of Heritage Lottery Fund funding applications.
- Satisfactory references.
- Your fee proposal.

Responses are requested by week ending 22 May 2015.

For further information please contact [REDACTED] Guildford Borough Council Heritage Manager on 01483 444 [REDACTED] or at [REDACTED] guildford.gov.uk

Brief for **Business Planning** consultancy support for Guildford BC

Introduction

Guildford Borough Council is preparing a second-round application to the Heritage Lottery Fund for the project "Creating a Heritage Hub for Guildford". This project will create a heritage quarter in the town and establish Guildford Castle and Museum as a united site and attraction at its heart. As part of this it will reconfigure Guildford Museum to open into the adjoining Castle Gardens, a site containing remains of a royal castle linked with medieval kings, including Stephen and Henry III, for over 300 years. The site was later associated with Lewis Carroll, who rented a house on the footprint of the historic castle for his sisters and who died in the house in 1898. It will protect and enhance remains, incorporating them into a new museum entrance and exhibition space and linking them to galleries. Refurbished displays will provide improved conditions for collections and use different formats and approaches to engage a range of audiences in the story of the town and borough, complemented by a new learning space and programme of activities and opportunities.

The project will unite places with a related history, increasing access to, and understanding of heritage assets including the castle, historic collections and the story of the town and borough that grew around it, producing a refreshed and enlivened museum and the major heritage hub and attraction for the borough's community and its visitors.

The objectives of the project are:

1. To raise the contribution of Guildford's history and heritage to the town's life, vibrancy and sense of place by integrating and promoting its many heritage attractions within a heritage quarter
2. To transform the heritage value and appeal of Guildford's castle and museum as the town's heritage hub: a focal point for the heritage quarter and a key community venue and primary visitor attraction.
3. To help protect and preserve the remains of the historic castle site and the Guildford Borough museum collections so that their heritage significance can be enjoyed by current and future generations
4. To allow more and a wider range of people to access and experience the heritage assets
5. To maximise the use of the castle and museum sites, buildings and collections as a source of learning and inspiration
6. To increase opportunities for local people to be involved in the operation and development of the site and service

Purpose

To support Guildford Borough Council's Heritage Team in developing the Business Plan for the Creating a Heritage Hub for Guildford project.

Objective

To develop a robust, financially sustainable Business Plan in support of the Guildford Heart of Heritage project that will enhance the castle and museum's financial position and operations. It will include a 10-year financial operating model to demonstrate sustainability of the project long-term. The Business Plan will be included as part of an HLF Second Round Submission in November 2015 and must be able to satisfy HLF's business planning guidance, which can be downloaded from the HLF web-site.

Tasks

Review existing financial information from the Museum & Castle Site held by Guildford BC.
Prepare a work plan for the preparation of the Business Plan.
Review and refine in more detail/ as necessary the Business Plan Strategic approach.

Undertake a trading review.

Undertake Comparator research to support determination development of the financial model and validate the overall robustness of the Business Plan.

In collaboration with other members of the Project Team (preparing in parallel - project Designs; Activity Plan; Conservation Plan; and Management & Maintenance Plan) develop in detail the 10-year operating model – ensuring operational practicalities are taken into account so that the model is realistic.

Identify proposed staffing provisions for the operating model and provide supporting job descriptions for new posts.

Develop and refine the Financial Appraisal.

Carry out sensitivity analysis that highlight risks and identify alternatives for dealing with potential shortfalls.

Develop long-term monitoring and evaluation methodology.

Timing

Development phase is March 2015 until November 2016– as reflected in Business Planning Milestones below:

<i>Business Planning Milestones</i>	<i>Start</i>	<i>Finish</i>	<i>Comments</i>
Appointment of Business Planning Consultant	06/04/15	01/06/15	Appointment; inception meeting and review of existing/ previous consultations and project information
Research and preparation of draft Business Plan	01/06/15	31/08/15	
Consultation on the draft Business Plan	31/08/15	28/09/15	
Post-consultation amendment	28/09/15	02/10/15	
Integration period with Activity Plan; Conservation Plan; and Maintenance & Management Plan	02/10/15	29/04/16	
Business Plan – Sign-off	29/04/16	11/16	

Budget

£15,000

Dimensions

The Consultant can occasionally work at Guildford Museum.

The day-to-day contact for the project will be through the Creating a Heritage Hub for Guildford Project Manager.

The production of the Business Plan will be managed by a Working Group [Advisory/ Focus Group] comprising:

- [REDACTED] Guildford Borough Council Heritage Manager
- Chris Mansfield: Guildford BC Head of Economic Development
- [REDACTED] Guildford BC Senior Accountant
- [REDACTED] Guildford BC Customer Operations & Communications Manager
- Guildford Heart of Heritage Project Manager
- Others: TBC

All information gained through this project will be the ownership of Guildford Borough Council.

Resource material

HLF Round 1 Application dated November 2014.

Guildford BC operating information and visitor research.

Invitation to tender

Candidates are required to submit:

- Details of suitability for the work and approach.
- Details of what work you would propose to undertake and work you would anticipate being undertaken by Guildford BC under your direction/ guidance, in the supporting role identified.
- A detailed timetable and who is responsible for each element and number of days work proposed.
- A fee proposal. The amount of VAT must be identified separately within the proposal costs.
- The names and CVs of authors preparing the Business Plan
- References from previous work of a similar nature.

Selection criteria: Consultant/s will be chosen on the basis of the following:

- Your understanding of the brief and your approach to addressing the tasks identified.
- Experience of researching and developing business plans – of comparable nature/ subject matter.
- Experience in undertaking all the tasks identified.
- Experience of Heritage Lottery Fund funding applications.
- Satisfactory references.
- Your fee proposal.

Responses are requested by week ending 22 May 2015.

For further information please contact [REDACTED] Guildford BC Heritage Manager on 01483 444 [REDACTED] or at [REDACTED] guildford.gov.uk

Brief for **Fundraising** consultancy support for Guildford Borough Council

Introduction

Guildford Borough Council is preparing a second-round application to the Heritage Lottery Fund for the project "Creating a Heritage Hub for Guildford". This project will create a heritage quarter in the town and establish Guildford Castle and Museum as a united site and attraction at its heart. As part of this it will reconfigure Guildford Museum to open into the adjoining Castle Gardens, a site containing remains of a royal castle linked with medieval kings, including Stephen and Henry III, for over 300 years. The site was later associated with Lewis Carroll, who rented a house on the footprint of the historic castle for his sisters and who died in the house in 1898. It will protect and enhance remains, incorporating them into a new museum entrance and exhibition space and linking them to galleries. Refurbished displays will provide improved conditions for collections and use different formats and approaches to engage a range of audiences in the story of the town and borough, complemented by a new learning space and programme of activities and opportunities.

The project will unite places with a related history, increasing access to, and understanding of heritage assets including the castle, historic collections and the story of the town and borough that grew around it, producing a refreshed and enlivened museum and the major heritage hub and attraction for the borough's community and its visitors.

The objectives of the project are:

1. To raise the contribution of Guildford's history and heritage to the town's life, vibrancy and sense of place by integrating and promoting its many heritage attractions within a heritage quarter
2. To transform the heritage value and appeal of Guildford's castle and museum as the town's heritage hub: a focal point for the heritage quarter and a key community venue and primary visitor attraction.
3. To help protect and preserve the remains of the historic castle site and the Guildford Borough museum collections so that their heritage significance can be enjoyed by current and future generations
4. To allow more and a wider range of people to access and experience the heritage assets
5. To maximise the use of the castle and museum sites, buildings and collections as a source of learning and inspiration
6. To increase opportunities for local people to be involved in the operation and development of the site and service

Purpose

To develop a Fundraising Strategy and Plan for the Creating a Heritage Hub for Guildford project.

Objective

The production of an appeal fundraising strategy is an important step in developing the project. It is required to produce and demonstrate a clear, strategic and achievable approach to achieving income targets and to provide milestones and targets for monitoring progress, enabling plans to be reviewed and refined as necessary.

The fundraising consultant will assist with the production and achievement of the appeal fundraising strategy, contributing high level skills and broad experience in fundraising to give strategic direction and support to the Heritage Manager and the temporary project Fundraising Officer. The consultant will play a key role in enabling the project to progress by ensuring that the Museum achieves interim partnership funding targets to demonstrate feasibility of proposals for the second –round HLF

application and meets overall targets on approval of the second-round bid to allow the Museum to commence the project.

Consultancy objectives

- To assist and support the Heritage Manager and Fundraising Officer in developing a fundraising strategy for the Creating a Heritage Hub for Guildford project
- To support the Heritage Manager and Fundraising Officer in implementing and achieving the strategy
- To contribute to meeting income targets

Tasks

The fundraising strategy should include the following elements:

- An introduction to the project aims, objectives and proposals
- Details of proposed project expenditure (capital and revenue) and income
- Defining the fundraising strategy
- Research and analysis of sources for fundraising for this project including:
- Corporate sponsorship, giving and in-kind support
- Fundraising events
- Individual giving, including major donors, digital appeals, Friends and Membership schemes
- Trusts and foundations, producing recommendations for those to be pursued
- Developing outline approaches and targets for different funding sources
- An action plan
- A budget for fundraising costs
- Milestone targets, income projection and a timetable for implementation

Attend meetings as required including preparing and making presentations

Provide information necessary for submission to funding bodies as required

Timing

Development phase is March 2015 until November 2016– as reflected in Fundraising Milestones below:

<i>Fundraising Strategy Milestones</i>	<i>Start</i>	<i>Finish</i>	<i>Comments</i>
Appointment of Fundraising Consultant	06/04/15	01/06/15	
Completion of fundraising strategy	01/06/15	28/09/15	
Implementation of fundraising strategy – support	28/09/15	26/10/16	
Fundraising strategy – sign off and handover	26/10/16	11/16	

Budget

£20,000

Dimensions

The Consultant can occasionally work at Guildford Museum.

The day-to-day contact for the project will be through the Creating a Heritage Hub for Guildford Project Manager.

The production of the Fundraising Strategy will be managed by a Working Group [Advisory/ Focus Group] comprising:

- [REDACTED] Guildford Borough Council Heritage Manager
- [REDACTED] Guildford Borough Council, Lead Councillor for Development
- Guildford BC Senior Accountant
- Guildford Heart of Heritage Project Manager
- Others: TBC

All information gained through this project will be the ownership of Guildford Borough Council.

Resource material

HLF Round 1 Application dated November 2014.

Invitation to tender

Candidates are required to submit:

- Details of suitability for the work and approach.
- A detailed timetable and who is responsible for each element and number of days work proposed.
- A fee proposal. The amount of VAT must be identified separately within the proposal costs.
- The names and CVs of authors preparing the Business Plan
- References from previous work of a similar nature.

Selection criteria: Consultant/s will be chosen on the basis of the following:

- Your understanding of the brief and your approach to addressing the tasks identified.
- Experience in undertaking all the tasks identified.
- Experience of Heritage Lottery Fund funding applications.
- Satisfactory references.
- Your fee proposal.

Responses are requested by week ending 22 May 2014.

For further information please contact [REDACTED] Guildford Borough Council Heritage Manager on 01483 444[REDACTED] or at [REDACTED] guildford.gov.uk

Brief for **Management & Maintenance Planning** consultancy support for Guildford BC

Introduction

Guildford Borough Council is preparing a second-round application to the Heritage Lottery Fund for the project "Creating a Heritage Hub for Guildford". This project will create a heritage quarter in the town and establish Guildford Castle and Museum as a united site and attraction at its heart. As part of this it will reconfigure Guildford Museum to open into the adjoining Castle Gardens, a site containing remains of a royal castle linked with medieval kings, including Stephen and Henry III, for over 300 years. The site was later associated with Lewis Carroll, who rented a house on the footprint of the historic castle for his sisters and who died in the house in 1898. It will protect and enhance remains, incorporating them into a new museum entrance and exhibition space and linking them to galleries. Refurbished displays will provide improved conditions for collections and use different formats and approaches to engage a range of audiences in the story of the town and borough, complemented by a new learning space and programme of activities and opportunities.

The project will unite places with a related history, increasing access to, and understanding of heritage assets including the castle, historic collections and the story of the town and borough that grew around it, producing a refreshed and enlivened museum and the major heritage hub and attraction for the borough's community and its visitors.

The objectives of the project are:

1. To raise the contribution of Guildford's history and heritage to the town's life, vibrancy and sense of place by integrating and promoting its many heritage attractions within a heritage quarter
2. To transform the heritage value and appeal of Guildford's castle and museum as the town's heritage hub: a focal point for the heritage quarter and a key community venue and primary visitor attraction.
3. To help protect and preserve the remains of the historic castle site and the Guildford Borough museum collections so that their heritage significance can be enjoyed by current and future generations
4. To allow more and a wider range of people to access and experience the heritage assets
5. To maximise the use of the castle and museum sites, buildings and collections as a source of learning and inspiration
6. To increase opportunities for local people to be involved in the operation and development of the site and service

Purpose

To support Guildford Borough Council's Asset Development in developing the Management & Maintenance Plan for the Creating a Heritage Hub for Guildford project.

Objective

To develop a robust, financially sustainable Management & Maintenance Plan in support of the Creating a Heritage Hub for Guildford project that will keep the castle and museum in good condition and prevent decay. The Management & Maintenance Plan will be included as part of an HLF Second Round Submission in November 2014 and must be able satisfy HLF's management and maintenance planning guidance – which can be downloaded from the HLF web-site.

Tasks

Review existing resource material for the Castle & Museum Site and advise on any shortcomings of existing survey information.

Prepare a work plan for preparation of the Management & Maintenance Plan.

In collaboration with other members of the Project Team (preparing in parallel - project Designs; Activity Plan; Conservation Plan; and Management & Maintenance Plan) develop a Management & Maintenance Plan for Guildford Castle & Museum including:

Understanding the heritage – provide a summary with reference to the existing Conservation Management Plan

Provide an assessment of the current management and maintenance situation with reference to existing resource information and the developing Business Plan.

Identify potential risks to the heritage and how they would be managed.

Identify management and maintenance aims and objectives for managing and maintaining the Guildford Castle & Museum Site; Collection; any other assets; and the skills, activities, equipment and facilities required to support them.

Prepare an action plan in the form of a schedule that sets out: what needs to be maintained and managed; the work involved; who will do it; when and how often; the resources required (money, people and skills)

Develop long-term monitoring; reviewing and updating methodology.

Timing

Development phase is March 2015 until November 2016– as reflected in the Management & Maintenance Planning Milestones below:

<i>Management & Management Planning Milestones</i>	<i>Start</i>	<i>Finish</i>	<i>Comments</i>
Appointment of Management & Maintenance Planning Consultant	06/04/15	01/06/15	Appointment; inception meeting and review of existing/ previous management and maintenance information
Prepare Maintenance & Management Plan	01/06/15	28/09/16	
Management & Maintenance Plan – Sign-off	28/09/16	11/16	

Budget

£10,000

Dimensions

The Consultant can occasionally work at Guildford Museum.

The day-to-day contact for the project will be through the Guildford Heart of Heritage Project Manager.

The production of the Management & Maintenance Plan will be managed by a Working Group [Advisory/ Focus Group] comprising:

- [REDACTED] Guildford BC Heritage Manager
- TBC: Guildford BC Asset Management
- TBC: Guildford BC Parks & Countryside
- [REDACTED] Guildford BC Customer Operations & Communications Manager
- Guildford Heart of Heritage Project Manager
- Others: TBC

All information gained through this project will be the ownership of Guildford Borough Council.

Resource material

HLF Round 1 Application dated November 2014.

2009 Conservation Management Plan.

Previous Survey Information on the castle & museum.

Other information that may be held by Guildford BC's Asset Management and Parks & Countryside Teams.

Invitation to tender

Candidates are required to submit:

- Details of suitability for the work and approach.
- Details of what work you would propose to undertake and work you would anticipate being undertaken by Guildford BC under your direction/ guidance, in the supporting role identified.
- A detailed timetable and who is responsible for each element and number of days work proposed.
- A fee proposal. The amount of VAT must be identified separately within the proposal costs.
- The names and CVs of authors preparing the Management & Maintenance Plan
- References from previous work of a similar nature.

Selection criteria: Consultant/s will be chosen on the basis of the following:

- Your understanding of the brief and your approach to addressing the tasks identified.
- Experience of researching and developing management & maintenance plans – of comparable nature/ subject matter.
- Experience in undertaking all the tasks identified.
- Experience of Heritage Lottery Fund funding applications.
- Satisfactory references.
- Your fee proposal.

Responses are requested by week ending 22 May 2015.

For further information please contact [REDACTED] Guildford BC Heritage Manager on 01483 444 [REDACTED] or at [REDACTED] guildford.gov.uk

Brief for **Exhibition and Interpretation Designer**

Introduction

Guildford Borough Council is preparing a second-round application to the Heritage Lottery Fund for the project "Creating a Heritage Hub for Guildford". This project will create a heritage quarter in the town and establish Guildford Castle and Museum as a united site and attraction at its heart. As part of this it will reconfigure Guildford Museum to open into the adjoining Castle Gardens, a site containing remains of a royal castle linked with medieval kings, including Stephen and Henry III, for over 300 years. The site was later associated with Lewis Carroll, who rented a house on the footprint of the historic castle for his sisters and who died in the house in 1898. It will protect and enhance remains, incorporating them into a new museum entrance and exhibition space and linking them to galleries. Refurbished displays will provide improved conditions for collections and use different formats and approaches to engage a range of audiences in the story of the town and borough, complemented by a new learning space and programme of activities and opportunities.

The project will unite places with a related history, increasing access to, and understanding of heritage assets including the castle, historic collections and the story of the town and borough that grew around it, producing a refreshed and enlivened museum and the major heritage hub and attraction for the borough's community and its visitors.

The objectives of the project are:

1. To raise the contribution of Guildford's history and heritage to the town's life, vibrancy and sense of place by integrating and promoting its many heritage attractions within a heritage quarter
2. To transform the heritage value and appeal of Guildford's castle and museum as the town's heritage hub: a focal point for the heritage quarter and a key community venue and primary visitor attraction.
3. To help protect and preserve the remains of the historic castle site and the Guildford Borough museum collections so that their heritage significance can be enjoyed by current and future generations
4. To allow more and a wider range of people to access and experience the heritage assets
5. To maximise the use of the castle and museum sites, buildings and collections as a source of learning and inspiration
6. To increase opportunities for local people to be involved in the operation and development of the site and service

Purpose

To develop an Exhibition and Interpretation Strategy and Plan for the Creating a Heritage Hub for Guildford project.

Objective

The consultant will be required to develop and deliver an Exhibition and Interpretation Plan for the new Heritage Hub that will make a significant contribution to the look and presentation of the site as an interesting, appealing and easy to access visitor attraction, with a unique character and history of its own and interesting stories to tell to others. It must also address the needs of a broad visiting public, from family groups to the elderly; from the deaf and the disabled to visitors from outside the UK. The consultant will need to work with Guildford Borough Council's Heritage team, the architect and other contractors to ensure a co-ordinated and complementary approach to planning spaces and displays that will increase visitors' enjoyment of the heritage, their understanding of the buildings, stories and collections within and encourage them to explore the site and displays further.

Tasks

Develop an interpretive strategy and plan for the castle and museum site, providing exhibition and interpretation design to include exterior and interior signage and wayfinding, interpretation of the history and vistas in the Castle Gardens, presentation of permanent exhibition galleries, temporary exhibition gallery and the learning centre.

Provide a design concept for the look and treatment of interior design, displays, graphics and signage throughout the site, working in conjunction with the project architect, specialist consultants employed as part of the project team and Guildford Borough Council's Heritage team.

Provide a brief for a graphic designer to contribute to the interpretation strategy.

Provide a co ordinated plan of different interpretative methods to be used throughout the site, ensuring they address the needs of a range of target audiences and different learning preferences.

Provide all necessary drawings, plans, specifications and other documentation to agreed formats

Attend meetings as required including preparing and making presentations

Provide information necessary for submission to funding bodies as required

Timing

Development phase is March 2015 until November 2016– as reflected in Exhibition and Interpretation Planning Milestones below:

<i>Exhibition and Interpretation Planning Milestones</i>	<i>Start</i>	<i>Finish</i>	<i>Comments</i>
Appointment of Exhibition and Interpretation Planning Consultant	06/04/15	01/06/15	
Prepare interpretation strategy and plan	01/06/15	28/09/16	
Exhibition and Interpretation Strategy and Plan – Sign-off	28/09/16	11/16	

Budget

£10,000

Dimensions

The Consultant can occasionally work at Guildford Museum.

The day-to-day contact for the project will be through the Creating a Heritage Hub for Guildford Project Manager.

The production of the Exhibition and Interpretation Plan will be managed by a Working Group [Advisory/ Focus Group] comprising:

- [REDACTED] Guildford Borough Council Heritage Manager
- [REDACTED] Guildford Borough Council Exhibitions and Audience Development Officer
- [REDACTED] Guildford Borough Council Collections Officer
- Guildford Heart of Heritage Project Manager
- Others: TBC

All information gained through this project will be the ownership of Guildford Borough Council.

Resource material

HLF Round 1 Application dated November 2014.

Invitation to tender

Candidates are required to submit:

- Details of suitability for the work and approach.
- A detailed timetable and who is responsible for each element and number of days work proposed.
- A fee proposal. The amount of VAT must be identified separately within the proposal costs.
- The names and CVs of authors preparing the Business Plan
- References from previous work of a similar nature.

Selection criteria: Consultant/s will be chosen on the basis of the following:

- Your understanding of the brief and your approach to addressing the tasks identified.
- Experience in undertaking all the tasks identified.
- Experience of Heritage Lottery Fund funding applications.
- Satisfactory references.
- Your fee proposal.

Responses are requested by week ending 22 May 2015.

For further information please contact [REDACTED] Guildford Borough Council Heritage Manager on 01483 444[REDACTED] or at [REDACTED] guildford.gov.uk