

**Holy Trinity Hastings**

**Brief for Commissioned Work:  
Business Planner**

March 2024



# CONTENTS

	Page	
<b>1.0</b>	<b>Introducing the Project</b>	3
1.1	Summary	3
1.2	Background	3
<b>2.0</b>	<b>Tender Instructions</b>	5
2.1	Tender Requirements	12
2.2	Submission	12
<b>3.0</b>	<b>Scope of Service</b>	15
3.1	Introduction	15
3.2	Basis of Appointment	15
3.3	Professional Fees	15
3.4	Scope of Service Summary	15

## APPENDICES

Appendix I	Form of Tender
Appendix II	Programme
Appendix III	Round One NLHF Application
Appendix IV	Business Planning Document

---

## 1.0 Introducing the Project

### 1.1 Summary

This Brief sets out the requirements for the commissioning of a Business Planner for the Heritage@HTH project.

We are procuring the following consultants at the same time and encourage anyone interested to apply for multiple roles:

- Activity Planner
- Interpretation Planner
- Evaluation Planner

### 1.2 Background

Holy Trinity Hastings (HTH) is an Anglican church located in the Castle Ward of Hastings.

Holy Trinity Church is listed grade II\* being a particularly important building of national architectural and cultural significance. HTH was designed by the nationally renowned Gothic Revival architect, SS Teulon. It is a large and ornate building on a relatively constrained triangular 'Trinity Triangle' town centre site, which was the original location of the 19th century America Ground settlement. A polygonal vestry was added by another important architect, Romaine Walker in 1892. The interior has a large cathedral like quality containing several highly decorative fixtures and fittings by some of the best ecclesiastical artists of the time, including carvings by Thomas Earp, the pulpit by Romaine Walker and some windows by the acclaimed stained-glass artists, Clayton and Bell and Charles Eamer Kempe.

Importantly, the Church holds Edward Johnston's Missal, described as the finest illuminated manuscript since the Reformation and of Exceptional Significance: National and International Importance.

A unique War Memorial comprises two sets of five life sized allegorical figures painted on gold backgrounds with a central bronze and enamel triptych that bears the names of those killed in the First World War. It is understood the paintings were done by students of the Hastings School of Art under Philip Cole's direction.

The Church also has a set of parish magazines dating from 1892 to 2014, which can inform us of the history of the Church particularly, but also of Hastings and the country more widely over that period.

Hastings ranks as the most deprived lower tier local authority in the South East, Transport for South East area and South East Local Enterprise Partnership by almost all measures. Nationally, it ranks as 13th most deprived in terms of average rank in the Indices of Deprivation 2019, out of 317 lower tier local authorities. In seven of 11 deprivation indicators, problems in Hastings have worsened since 2015. Hastings was the 20th most deprived area

in 2015, but the 2019 figures show the things have worsened, making Hastings the most deprived local council area in the South East of England by far. The majority of the East Sussex's deprived neighbourhoods are located in Hastings, where 16 out of 53 wards (30%) rank in the most deprived decile nationally.

Castle ward, where HTH is located, is the third most deprived ward overall in all of East Sussex. In the 'crime' deprivation indicator, Castle ward ranks first in the county. Overall, 37 LSOAs in Hastings rank as relatively more deprived in 2019, compared to 2015. 43% of Hastings LSOAs are among the most deprived 20% nationally. The Income Deprivation Affecting Children Index (IDACI) shows that 27% of children in Hastings are living in families affected by income deprivation. 13 LSOAs in Hastings fall into the 10% most deprived nationally on this measure, including Castle ward. 30% of LSOAs in the county have a higher proportion of children living in income deprived families than the national average.

Yet in this context the HTH church community has grown from 20 in 2014 to around 530 weekly visitors in 2023, including some of the most marginalised people in the town.

Since arriving at the nearly defunct church in 2014, the current Church leadership team has re-established a community of over 530 weekly visitors, including some of the most marginalised. A wide range of community outreach projects on offer provides for those affected by poverty, those who face loneliness, social isolation and economic hardship. They also run a hugely popular weekly Tots and Me session and for children aged 0-4 and their carers, and offer weekly activities for teens to help grow confidence, and develop leadership skills through a range of games, creative activities and cooking together. During the summer months, we also run a weekly series of free Lunchtime Concerts, where we highlight the immense talent of our local musicians.

Economically, HTH draws footfall to the Trinity Triangle area to support the forty hospitality and retail businesses. This new project has received 'pump-priming' support from Trinity Triangle Heritage Action Zone. Historic England and Hastings Borough Council are supportive because they see its potential to leverage HTH's unique heritage to accelerate local rejuvenation.

HTH has been successful in securing a Development Phase grant from NLHF to develop a project.

### **1.2.1 Vision For the Project**

The Project's vision is to enable people to discover the many stories and treasures of Holy Trinity Hastings; stories linked to people from the past who created the Church we see today and those who continue to make it the vibrant and dynamic place it has become: a place of worship and a community hub serving the people of Hastings. We hope that engagement with our church, our treasures and our heritage, will encourage people to discover their own purpose and place within this community and create a renewed sense of pride and hope engendered by our wonderful building.

#### Our Core Aims:

- To ensure that our congregation, users, visitors, and our diverse community understand and appreciate the significant role that Holy Trinity Hastings has played in the development of Hastings.
- To raise the profile of HTH Church as one of the most important heritage buildings in Hastings and thereby attract and welcome new visitors to discover the mission of the church through the stories and people, the treasures and architecture of this special place.
- To work with hard to reach and under-represented sections of the local community that are relevant to our work in Hastings and are currently excluded from engaging with their heritage through lack of awareness, opportunity or resource.

### 1.2.2 The Project

The project will allow a fully restored and upgraded Holy Trinity Hastings Church (HTH) to be the central hub of a substantial community activity programme, which will include imaginative and engaging heritage interpretation and education activities and a programme of events, embracing the 'Trinity Triangle's' diverse communities and reaching out to new ones. Together, HTH and the residents will be able to celebrate the most ambitious heritage restoration and community involvement project in its history, revitalising this unique area as an upgraded tourist destination.

We will restore the Grade II\* Listed Holy Trinity Church, removing it from Historic England's Heritage at Risk Register. We will make improvements to the interior of the building, allowing more flexible use and implementing energy efficiency/sustainability measures. We will create robust Business and Management Plans for ongoing project sustainability.

Members of our community will be not just observers of the project, but creators too, empowered to contribute to a unique ongoing vision of what HTH will offer and represent to them. A series of co-created projects will be initiated with the aim of increasing participation and providing upskilling by researching, recording and making our heritage and stories accessible. We will focus activities on young people, but also invite the whole community to discover our treasures together.

We will establish the Trinity Triangle as a premier visitor attraction, increasing visitors by 30%.

We will create a vibrant range of activities, including projects, exhibitions and events, which will:

- Create a sense of pride in place for residents through historical research and interpretation, and engagement projects.
- Widen participation of new users, in particular young people, offering respite activities for young carers and an ambitious plan of skills improvement and learning opportunities for the young people at college.
- Tackle social isolation affecting older people living in the area.

- Strengthen existing volunteer opportunities by upskilling and supporting the current volunteers in creating delivering new projects and recruiting new volunteers to gain valuable experience.
- Significantly increase the footfall for the local businesses in the Trinity Triangle.
- Be delivered through local partnerships with front line-service providers, education providers, and heritage organisations.

### ***Environmental Sustainability***

In order to ensure the environmental and financial sustainability of Holy Trinity Church, the 2030 target of Carbon zero set by the Church of England will to be taken seriously in our project delivery.

Holy Trinity commissioned an Energy Audit and Sustainability Assessment, which concluded that the carbon emissions from heating are the biggest single factor in the carbon footprint of the Church. To address this issue, new efficient boilers running a low temperature underfloor heating system will be installed, which will radically reduce gas consumption. The boilers will have the ability to be converted to multi fuel use as and when these become readily available. The heating system will be zoned so areas not requiring heating can be turned off when not in use.

We are also installing a new lighting and electrical power system, which will use LED and other technologies to significantly reduce electrical consumption. Ancillary areas will have movement sensors on them so we can ensure energy is only used when the areas are occupied.

All items used for the interpretation of the Church and our treasures will be designed with sustainability in mind. Materials used for showcases, LED lighting will follow best practice in sustainability. By not having fixed interpretation panels we will reduce the amount of material used and instead rely on digital interpretation, downloaded to phones or delivered via listening posts. Using 'Julies Bicycle' resource pack designed for ACE we will follow their advice on sustainable display within museum and heritage settings.

We are committed to appointing local contractors, where possible and using local resources, in an effort to reduce travel miles for goods and services during the capital project.

During the development phase, we will join Fit for the Future, to ensure that all opportunities to address the project's environmental impacts have been considered and implemented, as appropriate.

### ***Capital Works***

The heritage of Grade II\* listed Gothic Revival building of Holy Trinity Hastings (HTH) will be considerably enhanced by the successful delivery of this project. Significant repairs to the building's external sandstone walls, identified as urgent in the 2023 Quinquennial Report, will be addressed, leading to HTH being removed from Historic England's Heritage at Risk Register. The Quinquennial Report shows that many areas to the exterior of the church building have been subject to erosion and require urgent repair to avoid water penetration

and potential failure. Additionally, stone has fallen from high levels of the church building, fortunately without causing any harm to passers-by below.

Upgrades to the interior of the building will allow HTH to better realise its community potential as the largest interior space in this area of Hastings, and implement energy efficiency measures.

In order to safeguard the Church, and prevent the imminent loss of historic fabric, the following capital works need to be undertaken:

#### Externally

- The careful removal and then replacement of carved Caen Stone and Bath Stone elements where necessary for the structural integrity of the building, and their replacement with new Caen Stone and Bath Stone, carefully selected from the best beds available to ensure the best longevity for the repairs. This work will require the structural support of significant elements of the building to allow masonry to be removed and replaced, and significant work in re-carving lost details.
- Carry out stone, mortar and glass repairs to windows and doors to make safe and water tight.
- Remove inappropriate cement repairs to stone work and replace.
- The careful removal of the main stained-glass windows in the eastern windows, to allow the masonry repairs to be undertaken, and their conservation, repair and reinstatement.
- Carry out repairs to roof, coping and valley gutter.
- Carry out repointing work as required.
- The leaded lights and casements in the vestry, west elevation and south elevation will also need to be removed to allow masonry repairs, but in many instances will also have to be completely rebuilt because of the failure of the lead comes.
- The replacement of failed guttering and rain water goods to cope with the modern climate, particularly on the south elevation, and the repairs of the downpipes particularly on the northern elevation.

#### Internally

- With regards the internal boarded floors the state of decay and the extent of repairs required is such that it is best for the building to look at a complete relaying of the floor and repair of the structure. This means an underfloor heating system can be installed, which will significantly reduce the carbon footprint of the building and assist with the desire to make the building as energy efficient as possible. This work will also make the Nave level.
- In addition, to ensure the environmental and financial sustainability of Holy Trinity Church, the 2030 target of Carbon zero set by the Church of England needs to be taken seriously. This means a new lighting and electrical power installation needs to be installed, which will use LED and other technologies to significantly reduce electrical consumption, and new efficient boilers running a low temperature underfloor heating system needs to be installed. This will radically reduce gas consumption, and the boilers will have the ability to be converted to multi fuel use as and when these become readily available.
- The provision of new WCs within the church.

- Restoration of the War Memorial located inside the building. This will include cleaning tests, surface cleaning, stabilisation, timber repair, retouching, detachment of canvas paintings, repair or replacement of the supports, canvas repairs and regilding.

### Interpretation

- Edward Johnston's Missal, described as the finest illuminated manuscript since the Reformation and of Exceptional Significance: National and International Importance will be assessed by conservators and a bespoke showcase for the Missal will be constructed, which will protect it from deterioration and display it with accompanying interpretation.
- A permanent mobile display on wheels to acknowledge the work done by volunteers on the project.
- As you will see from this Brief, HTH has a really rich set of stories to tell, and we are keen to tell these through some interpretation as well as through the Activity Plan. The church will continue to function primarily as a place of worship and for community based activities but it will open its doors to visitors to enable them to learn more about its heritage. There will be community consultation during the Development Phase to guide the decisions about the other fixed interpretation that will be created for the church.

### Training

There is a real shortage of skilled and experienced conservation professionals. The project at Holy Trinity Church presents an outstanding opportunity to allow young professionals and we expect each consultant to support the training of young people in the delivery of this project. Training, apprenticeships and work experience will also be built into the requirements for Consultants and Contractors. As part of the procurement process for each Consultant we are asking how they can support the training of young people in relation to their profession. This will be pulled together to contribute to the Activity Plan and coordinated in order to maximise its impact.

### **Activities**

The project Heritage@HTH is aimed at a diverse audience, which will be both in-person users but also a digital audience. We estimate 2,000 individual users will access the fascinating history of the Church and its significant contents through our improved website, displaying the results of volunteer research projects, an important part of our Activity Plan. We anticipate 250 volunteers and participants every year will work with us on our Activity Plan which will run alongside our vital reconstruction work. The ideas below were developed to inform the Round One application to NLHF. These will be explored, tested and developed into an Activity Plan during the Development Phase.

Through our current community support programme, we are well aware of the significant challenges faced by the Hastings community. Hastings is currently ranked as the 13th most deprived borough in England and worst in the whole of the SE. A strong part of our vision for this project is to support those within Hastings who are impacted by poverty as well as high levels of unemployment particularly amongst young people. 27% of children in Hastings are



living in families impacted by income deprivation, in comparison with 1 in 10 in the neighbouring borough of Wealden. The percentage increase in young people involved in unpaid caring duties is larger than anywhere else in the SE. We will focus the delivery of benefits from our project on young people, using our project to increase their life chances. It is important for young people to understand the place and heritage they live with, engendering a sense of understanding and belonging.

We will provide enhanced volunteering opportunities with training and skill development for a wide range of participants, but particularly young people. The Church has an existing group of 130 volunteers, and we anticipate recruiting 50 young volunteers, together they will be encouraged to learn new skills in:

- archive research – working with our important collection of parish magazines dating from 1891.
- oral history recording
- interpretation planning
- guiding
- practical conservation

Our project will give us an increased need for volunteers to undertake our activity plan and we will target young volunteers to work with us on construction, conservation, digital content, film making, photography, oral history interviewing and recording. By involving young people in projects with tangible outcomes they can improve life skills, gain confidence and a sense of pride in their achievements, which will live on in the newly restored Church, with its greatly improved visitor offer.

We will work with Care for the Carers East Sussex to involve young carers in a way which is possible for them, and will work with East Sussex College to offer construction apprenticeships and practical work experience for photography and film making students, opening up new career paths and enhancing employability. We will ensure participants are not financially disadvantaged by participation by ensuring our budget is sufficient to meet their expenses. We also plan to offer paid work placements for some young people.

We will ensure that older people at risk of isolation and loneliness will be invited to participate in research and oral history projects where companionship and friendship will be a significant outcome. We will work in partnership with Hastings Museum and The Keep in Falmer, both have significant archives relating to HTH and will provide workshops and training for our volunteers.

Visitors to the town interested in heritage/architecture will be able to find out more about the history of the Church, its stories and its treasures. Tourism SE estimated that around 3.8 million tourism day trips were made to Hastings in 2019. Many of these tourists attracted by the heritage of Hastings and the 1066 story. The Church story will be better interpreted, and the restored Church will have much greater potential to attract visitors to this part of the town. We anticipate 3,000 tourism visitors will be newly attracted to the Church. By having regular 'Church Stories' open days (two per month) HTH will become a part of the heritage trail around Hastings.

There will be professional benefits for neighbouring churches. In discussion with the Diocese of Chichester, we have identified three major parish churches on the Heritage at Risk register that have significant historic fabric issues and a desire to develop their heritage spaces for wider community use and engagement. We will share learning and provide mentoring for them to establish if they can and should work up an approach for funding to the NLHF, with insights in how to go about it. The Diocese will be involved in selecting the appropriate church heritage assets for mentoring support. We will host two half-day site visits to HTH for Diocesan staff which will include presentations from the incumbent, project leader, heritage adviser and architect. There will be five meetings off-site, for an HTH project lead and heritage engagement staff to talk to the PCCs.

Direct employment opportunities will be three project posts and associated construction apprenticeships.

In summary, Activities are expected to include:

- Recruit and train volunteers
- Restore and conserve present Missal
- Restore and Conserve War memorial
- Carry out research project with Hastings Museum and The Keep
- Devise interpretation strategy and plan
- Create interpretation for the Church and its Treasures both physical and digital
- Create additional digital content for all interpretation to be used on website and app
- Develop Heritage micro site on HTH website
- Carry out oral history project recording memories of HTH and the surrounding area
- Work on skills development and youth unemployed support with East Sussex College
- Implement apprenticeships, work experience and young volunteering programme
- Implement support programme for young carers based around heritage activities
- Create 'Church Stories' days opening HTH to visitors twice per month with a programme of guided tours, talks and events.

### **Budget**

The budgets for Development and Delivery Phase of the project are as follows:

Description	Order of Cost	VAT	Total incl. VAT
<b>Capital Costs</b>			
Capital costs e.g. prelims, purchase of property, digital outputs, equipment, repair and conservation, new building work	2,140,309	428,062	2,568,371
Other Capital costs e.g. surveys, decant, loose FFE	190,500	35,100	225,600
Professional Fees	693,846	138,769	832,616
<b>Total Capital Costs</b>	<b>3,024,655</b>	<b>601,931</b>	<b>3,626,586</b>
<b>Activity Costs</b>			
New staff costs	288,000	0	288,000
Other Activity Costs e.g. training, volunteer expenses, events, delivering activity plan	290,000	52,000	342,000

<b>Total Activity Costs</b>	<b>578,000</b>	<b>52,000</b>	<b>630,000</b>
<b>Other Costs</b>			
Other costs e.g. governance review, recruitment, publicity, evaluation, community grants, increased management and maintenance	71,500	14,100	85,600
Contingency	674,156	129,251	803,407
Inflation	376,600	70,120	446,720
Volunteer time	44,760	0	44,760
<b>Total Other Costs</b>	<b>1,167,016</b>	<b>213,471</b>	<b>1,380,487</b>
<b>Total</b>	<b>4,769,671</b>	<b>867,402</b>	<b>5,637,074</b>

### 1.2.3 The Project Team

Holy Trinity Hastings will also be procuring or have procured the following Consultants to comprise the Project Team:

- Project Manager
- Quantity Surveyor
- Architectural Design Team (Including Principal Designer, Conservation Architect, Structural Engineer, MEP Engineer, Access Consultant, Lighting Designer)
- Activity
- Interpretation Planner
- Business Planner
- Evaluation Consultant
- Fundraising Consultant

### 1.2.4 Programme

In the Appendices there is a detailed programme. Below are the key dates:

RIBA 2	June - October 2024
Development Review with NLHF	October 2024
RIBA 3	October 2024 – March 2025
Submission of Round Two application to NLHF	May 2025
RIBA 4	October 2025 – April 2026
Procurement and appointment of Contractor	April – July 2026
Works on site	August 2026 – July 2027
Launch event	November 2027
End of Rectification Period	July 2028
Delivery of Activity Plan Completed and final submission to NLHF	February 2029

## 2.0 Tender Instructions

### 2.1 Tender Requirements

The following documents must be provided:

- A staged fee proposal including expenses
- Form of Tender (Appendix I)
- Responses to Quality Criteria
- Two references of Clients for whom you have completed similar work that we can contact
- Details of any assumptions made in preparing the above information
- Copies of Insurance Certificates for Professional Indemnity, Public Liability, and Employer's Liability
- Health and safety, environmental and equal opportunities policies
- Company accounts for the last three years
- Company history

### 2.2 Submission

Tenders must be submitted by no later than 23<sup>rd</sup> April 2024 via email or We transfer or other file sharing system to Neil Grover [neil.grover@hthchurch.org](mailto:neil.grover@hthchurch.org) and the email subject title to state "Holy Trinity Hastings: Business Planner".

During the tender period, should the tenderer wish to present questions or seek clarification on any information contained within this pack, requests will only be considered up to 15<sup>th</sup> April. Please submit any queries to Neil Grover [neil.grover@hthchurch.org](mailto:neil.grover@hthchurch.org)

#### 2.2.1 Procurement Programme

The programme for the procurement process is as follows:

Deadline for questions	15 <sup>th</sup> April
Deadline for responses	16 <sup>th</sup> April
Deadline for submissions	23 <sup>rd</sup> April
Interviews (if required)	2 <sup>nd</sup> or 3 <sup>rd</sup> May
Award of appointment	8 <sup>th</sup> May
Appointment commences	9 <sup>th</sup> May

## 2.2.2 Selection Criteria

<b>Qualitative</b>	
Relevant experience of developing Business Plans and delivering them for NLHF funded major capital projects in the heritage sector	20%
Experience of working with similar organisations to churches	20%
Methodology for the Project	10%
Set out how you would support training of young people in relation to your discipline if awarded this contract	10%
CVs of the key personnel that will work on the Project	10%
<b>Quantitative</b>	
Price Overall	30%

**2.2.3** A desktop assessment will be carried out of all tenders received against the criteria outlined below. Where questions are to be scored and weighted, each question and sub-question will be scored in accordance with the scoring matrix below. The score will then be awarded and the percentage weighting applied to give the weighted score for that question.

Capability	Response	Remark	Marks
Supplier is likely to be able to meet the needs of the Client.	Response exceeds the anticipated answer and is completely convincing and relevant to the Project with substantiation from independent sources and references.	Absolute Confidence	10
Supplier is likely to be able to meet the needs of the Client.	Response comprehensively answers the question and is convincing and relevant to the Project.	Confidence	8
Small risk that Supplier will not be able to meet the needs of the Client.	Response sufficiently answers the question without omission and is generally convincing and relevant to the Project.	Minor Concerns	6
Moderate risk that the Supplier will not be able to meet the needs of the Client.	Response has minor omissions and is in part(s) unconvincing or irrelevant to the Project.	Moderate Concerns	4
Significant risk that the Supplier will not be able to meet the needs of the Client.	Response has major omissions and is largely unconvincing or irrelevant to the Project.	Major Concerns	2
Supplier will not be able to meet the needs of the Client.	No response or misleading response provided.	Not Acceptable	0

The price related elements of the qualitative criteria will be scored in accordance with the following:

The lowest price or percentage will be awarded maximum mark of 10. All other tenders will then be assessed against the lowest with marks being deducted by the percentage that their submission is higher as per the worked examples below. Note that the minimum score that will be awarded is 0.

<b>Example 1</b>	<b>Tender Price</b>	<b>Percentage Difference from the Lowest (x%)</b>	<b>Calculation of Score 10 – (10*x%)</b>	<b>Score Awarded</b>
Tenderer A	£10,000	0%	10 – (10*0%)	10
Tenderer B	£12,000	20%	10 – (10*20%)	8
Tenderer C	£17,000	70%	10 – (10*70%)	3
Tenderer D	£25,000	150%	10 – (10*150%)	0
<b>Example 2</b>	<b>Tender Percentage</b>	<b>Percentage Difference from the Lowest (x%)</b>	<b>Calculation of Score 10 – (10*x)</b>	<b>Score Awarded</b>
Tenderer A	20%	0%	10 – (10*0%)	10
Tenderer B	25%	25%	10 – (10*25%)	7.5
Tenderer C	30%	50%	10 – (10*50%)	5
Tenderer D	45%	125%	10 – (10*125%)	0

The resource related elements of the qualitative criteria will be scored in the same way but to the inverse with the highest resource awarded maximum mark of 10. All other tenders will then be assessed against the highest with marks being deducted by the percentage that their submission is lower as per the worked example below. Note that the minimum score that will be awarded is 0.

<b>Example 3</b>	<b>Tender Resource Days</b>	<b>Percentage Difference from the Highest (x%)</b>	<b>Calculation of Score 10 – (10*x%)</b>	<b>Score Awarded</b>
Tenderer A	200	0%	10 – (10*0%)	10
Tenderer B	180	10%	10 – (10*10%)	9
Tenderer C	140	30%	10 – (10*30%)	7
Tenderer D	30	85%	10 – (10*85%)	1.5

In addition to the desktop assessment, tenderers may be invited to attend a clarification meeting in the week commencing \*\*\*\*\*

## 3.0 Scope of Service

### 3.1 Introduction

The brief is for a Business Planner for Holy Trinity Hastings primarily during the development phase but there will be an option to retain the services of the Business Planner through the Delivery Phase to help advise the church to factor in any changes that arise during this phase. The work should be carried out in line with [Business plan good practice guidance | The National Lottery Heritage Fund](#)

### 3.2 Basis of appointment

The employer will be Holy Trinity Hastings.

The contract will run from appointment to the end of the Development Phase, predicted to be May 2025. There is an option to extend the contract should support be required in the Delivery Phase.

### 3.3 Professional Fees

This work has a budget of £15,000 Development Phase with fees and resource to be agreed for Delivery Phase if required, based on the day rates submitted at tender. This should include travel and expenses but excluding VAT. Payment stages to be agreed with the chosen consultants. The consultant(s) is expected to tailor their work to the demands of the programme and some occasional evening working may be required. There is some room for movement if this is not considered sufficient for the work required.

### 3.4 Scope of Service Summary

3.4.1 Consultants are required to work in partnership with the Client to build on the existing Outline Business Plan, and help answer the following key questions:

- What is the existing status of the organisation and the current policy context?
- What is the strategic context across all relevant themes?
- What is the socio-economic context and the audiences for the site?
- What is the market context in terms of the local, regional and international markets and how they relate to proposed and existing services provided?
- Who are the key comparator organisations and how do they compare?
- What are the lessons learnt from comparator organisations that can be translated to the project?
- What is the audience development context and how does this relate to the Activity Plan for the project?
- What is the Strategic Development Plan for the organisation, including aims and objectives going forward?
- What are the future visitor number projections, including the calculation basis?
- What is the capacity analysis for the future?

- 
- What is the income generation potential of the site, what pricing policies can be developed?
  - What are the future expenditure assumptions for the site?
  - How can a sustainable business model be developed?
  - What is the sensitivity analysis for the business model?
  - What are the key risks to the business case and how can these be mitigated?
- 3.4.2 Undertake detailed market appraisal to include:
- Socio-economic context
  - Catchment review
  - Local, regional and national competitors.
- 3.4.3 Undertake comparator benchmarking to 3 prioritised sites.
- 3.4.4 Undertake business case financial projections and confirm financial assumptions, to include:
- Income and expenditure profiles and projections for 10 years post completion
  - Undertake sensitivity analysis.
- 3.4.5 Undertake a detailed analysis of the existing management and governance arrangements and propose and agree a robust future model.
- 3.4.6 Undertake a thorough review and analysis of the strategic context across all relevant themes, locally, regionally, nationally and internationally.
- 3.4.7 Collaborate with the Activity Planning consultant who will provide information on existing visitor numbers.
- 3.4.8 Prepare 'high level' visitor number projections for visitor number projections over the next five years to feed directly into the Activity Plan.
- 3.4.9 Consider key visitor flow routes, flow rates, staffing and commercial response needs in respect of the site.
- 3.4.10 Consider the future staffing options, approaches and responses in close consultation with the Client and other key consultants.
- 3.4.11 Explore and recommend a range of new income generating opportunities to meet the increased revenue costs associated with the project.
- 3.4.12 Undertake a full market appraisal for the site, involving a wide range of qualitative and quantitative methods and exploring the market breakdown and context.
- 3.4.13 Develop a fully tested assessment of the market potential for the project and link this to the Activity Plan.



- 
- 3.4.14 Undertake a full financial appraisal of the project, examining, analysing and producing:
- The existing financial health check
  - Ten-year income projections
  - Ten-year expenditure projections
  - Ten-year financial plan
  - Robust and fully tested sensitivity analysis
  - Key milestones within the financial plan.
- 3.4.15 Develop a comprehensive risk assessment for the Business Plan and identify mitigating measures across the proposed activities.
- 3.4.16 Develop and produce a staff retention and sustainability policy for the project.
- 3.4.17 Assimilate, analyse and present all of the above into a robust Business Plan for the project.
- 3.4.18 Provide a full draft Business Plan ready for Development Review with NLHF and then update following feedback. The date of the Development Review has not yet been agreed but it should be presumed that it will be at the end of RIBA 2.
- 3.4.19 Work with other Consultants to develop the cashflow for the project e.g. in relation to staffing costs, marketing costs, income
- 3.4.20 The consultant's role will be to work with the Client to bring all of the above together in a Business Plan that meets the criteria of the NLHF and that puts forward a sustainable and robust business model for the whole site.

## Appendices

Appendix I Form of Tender

Appendix II Programme

Appendix III Round One NLHF Application

Appendix IV Business Planning Document