



BRIEF - PROJECT DIRECTOR

Project Management companies welcome to apply

1. Introduction

The Beckford Tower Trust (BTT) owns and manages Beckford's Tower, the last surviving building connected with the historically significant William Beckford. Located within the area of Lansdown, the building is open to the public at weekends, operating as a museum and Tower experience. Connected to the public buildings is a property leased to the Landmark Trust, operating as a holiday let. The Trust recognises an urgent conservation need to repair and conserve the Tower and is seeing this as an opportunity to develop our visitor experience, engage wider audiences and reconnect the Tower with its lost landscape, through new experiences, interpretation and access.

The initial exploratory works have been funded by Beckford Tower Trust (BTT), which has been awarded a development grant by the National Heritage Lottery Fund (NLHF) to develop their own proposals up to submission of planning and to assess their costs for the project. The outcome of this development work will influence the works to be carried out during the delivery phase, which we aim to fund through a combination of sources including a further NLHF grant, other grants and donations including that gained by direct fundraising. On completion of this development work a NLHF Round 2 grant request will be made and if successful, the conservation works and other activity plans will be funded by BTT with substantial support from its sole Trustee, Bath Preservation Trust (BPT) as well as from the NLHF.

A brief description of the elements of project management work required to complete the project is given below with a more detailed summary given in the executive summary and project management plan.

The client side Project Director will be required to work as part of a design team alongside the Capital Works Manager, Activities Officer and other consultants, contractors and members of staff, to provide a coherent and costed plan for the future operation of the repaired and upgraded Beckford's Tower and Museum and the construction works required to achieve this (Phase One) and to oversee its implementation (Phase Two). The successful post holder will be responsible for providing standard Project Management services to include in particular the following:-

These works will be carried out in two phases, the first (the Round 2 Development Work) will require oversight of the design of works, management of the budget and monitoring of cashflow, development of plans (up to the end of RIBA Stage 3) and delivery of the Activity Plan to allow submission of listed building and planning applications and a Round 2 NLHF application to request further funding.

The second will be oversight of the implementation of the works, budget, Activity Plan and Interpretation Strategy if the application is successful.

2. Development Phase

Scope of works:

The tasks required will include in particular the following:-

- Work closely with the following posts who will be appointed up to the end of Stage 1:-
 - Capital Works Manager
 - Activities Officer
 - Archivist
 - Admin and Finance Assistant
 - BPT Core Team
 - Other consultants / contractors as appointed including Interpretation, Evaluation, Architect and Quantity Surveyor
 - Responsibility for delivery of the Project Management Plan and Activity Plan to time and budget
 - Management and delivery of the project blog content

Programme:

The Project Director should be aware of the following deadlines / requirements:

- Approvals from various committees / Trustees will be required at specified points within the development phase (to be agreed at the start of the contract) and sufficient time should be allowed for this in the programme
- Complete RIBA Stage 1 and submit joint planning and listed building applications by June 2021
- Submit NLHF Round 2 by July 2021
- NLHF decision October 2021

Costs (inc. VAT):

DEVELOPMENT BUDGET - December 2019 - June 2021

Project Element	Cost	VAT	TOTAL	HLF Budget Line	Notes
Project Director	£64,000.00	£0.00	£64,000.00	New staff costs	5 days a week for 16 months. £40K & 20% on costs
Capital Works Manager	£21,000.00	£0.00	£21,000.00	New staff costs	5 days a week for 6 months £35K & 20% on costs
Archivist	£10,560.00	£0.00	£10,560.00	New staff costs	2 days a week for 1 year £22K FTE & 20% on costs
Admin and Finance Assistant	£25,200.00	£0.00	£25,200.00	New staff costs	5 days a week for 14 months £18K & 20% on costs
Activities Officer	£18,480.00	£0.00	£18,480.00	New staff costs	3 days a week for 14 months £22k FTE & 20% on costs
Evaluation consultant	£4,000.00	£800.00	£4,800.00	Professional Fees	Commissioned work to set evaluation framework and feed into evaluation reports based on 20 full days during 16 months
Staff and volunteer expenses	£1,666.67	£333.33	£2,000.00	Other costs	Travel and training
Detailed exploratory work in grotto tunnel & on roof	£3,500.00	£700.00	£4,200.00	Opening up works	Based on 2 days of review and follow up report
Tree and footpath advice	£2,500.00	£500.00	£3,000.00	Opening up works	Based on 2 days of review and follow up report
Archaeological consultancy costs	£1,500.00	£300.00	£1,800.00	Opening up works	Based on 2 days of review and follow up report
Interpretation consultancy	£18,000.00	£3,600.00	£21,600.00	Professional Fees	Commissioned work to support int strategy and feed into evaluation reports based on 25 full days during the 18 months
Evaluation contracted hours	£4,160.00	£832.00	£4,992.00	Other costs	Data gathering based on a day a week for 12 months

Advertising for recruitment	£416.67	£83.33	£500.00	Recruitment	Core staff roles only
Evaluation costs - materials	£300.00	£60.00	£360.00	Other costs	
Evaluation costs - travel and other costs	£500.00	£100.00	£600.00	Other costs	
Wall stile	£416.67	£83.33	£500.00	Other costs	
People counter	£6,750.00	£1,350.00	£8,100.00	Other costs	5 landscape people counters
IT costs	£4,000.00	£800.00	£4,800.00	Other costs	5 x laptops & MS Project software
Drawings	£2,083.33	£416.67	£2,500.00	Professional Fees	
Admin costs	£700.00	£140.00	£840.00	Other costs	Includes bid production
Planning permission costs	£900.00	£180.00	£1,080.00	Professional Fees	Includes staff time (SH)
Project salary costs	£22,888.00	£0.00	£22,888.00	Full Cost Recovery	Includes staff costs (CD, CK, PA, AF, CF, SM, RP & JH)
Premises running costs	£20,501.00	£0.00	£20,501.00	Full Cost Recovery	
PR and events	£10,000.00	£2,000.00	£12,000.00	Other costs	Includes stakeholder engagement & public cons.
Archive materials	£2,100.00	£420.00	£2,520.00	Other costs	Includes boxes, racking and storage materials
Access audit	£1,500.00	£300.00	£1,800.00	Opening up works	
Site visit costs	£2,500.00	£500.00	£3,000.00	Other costs	
Community projects - materials	£4,000.00	£800.00	£4,800.00	Other costs	
Community projects - fees	£4,000.00	£800.00	£4,800.00	Professional Fees	

Community projects - other costs inc. transport	£4,000.00	£800.00	£4,800.00	Other costs	
Enabling fencing works	£5,000.00	£1,000.00	£6,000.00	Other costs	
Professional fees	£80,172.00	£16,034.40	£96,206.40	Professional Fees	
Emergency works	£5,000.00	£1,000.00	£6,000.00	Professional Fees	
Contingency	£70,458.87	£14,091.77	£84,550.64	Contingency	
Volunteer time	£10,000.00	£0.00	£10,000.00	Volunteer time	
	£432,753.20	£48,024.84	£480,778.04		

3. Delivery Phase

Scope of works:

The tasks required will include in particular the following:-

- Manage and work closely with the following staff and consultants who will be appointed up to the end of Stage 2:-
 - Capital Works Manager (acting as lead consultant)
 - Activities Officer
 - Admin and Finance Assistant
 - Core BPT staff team
 - Other staff and consultants including Interpretation, Evaluation, Architect, Quantity Surveyor, CDM Co-ordinator, Fire Strategy and Building Regulations Advisor, Structural Engineer, Mechanical & Electrical Engineer
 - Delivery of the Project Management Plan and Activity Plan to time and budget
 - Management and delivery of the project blog content

Programme:

The Project Director should be aware of the following deadlines / requirements:-

- NLHF decision October 2021
- Approvals from various committees / Trustees will be required at specified points within the development phase (to be agreed at the start of the contract) and sufficient time should be allowed for this in the programme
- The Quantity Surveyor is to be given at least 2 weeks to cost the works at points as agreed as above
- Completion of works - this will be dependent on the final designs and on the procurement method chosen for the construction, museum and landscaping works. However, estimates indicate that the project will be completed by Winter 2022, with the museum Grand Opening being pencilled in for March 2023. (A grand opening mid-way through or at the end of the Museum's open season should ideally be avoided but a soft launch for Christmas 2022 should be considered.)

Costs (inc. VAT):

Project Element	Cost	VAT	INFLATION	INFLATION VAT	TOTAL	HLF Budget Line	Notes
Interpretation - digital	£25,000.00	£5,000.00	£3,750.00	£750.00	£34,500.00	Digital	inc. access recommendations
Project admin costs inc. printing	£666.67	£133.33	£100.00	£20.00	£920.00	Equipment and materials (activity)	
Transportation and storage of museum collection - materials	£2,200.00	£440.00	£330.00	£66.00	£3,036.00	Equipment and materials (activity)	
Interpretation - materials	£917.00	£183.40	£137.55	£27.51	£1,265.46	Equipment and materials (activity)	
Community projects - materials	£15,000.00	£3,000.00	£2,250.00	£450.00	£20,700.00	Equipment and materials (activity)	
Hanwell conservation system	£5,416.67	£1,083.33	£812.50	£162.50	£7,475.00	Equipment and materials (activity)	Stairwell not included
Heating system relocated	£1,000.00	£200.00	£150.00	£30.00	£1,380.00	Equipment and materials (activity)	
Interpretation - physical	£70,000.00	£14,000.00	£10,500.00	£2,100.00	£96,600.00	Equipment and materials	inc. cemetery, grotto, basement, roof, museum & conservation

						(activity)	
Interpretation - print	£7,000.00	£1,400.00	£1,050.00	£210.00	£9,660.00	Equipment and materials (activity)	inc. guidebook and access recommendations
Lighting including track upgrade	£5,000.00	£1,000.00	£750.00	£150.00	£6,900.00	Equipment and materials (activity)	
Museum fit out - toilet upgrade	£5,000.00	£1,000.00	£750.00	£150.00	£6,900.00	Equipment and materials (activity)	
Museum fit out - Security and UV	£8,000.00	£1,600.00	£1,200.00	£240.00	£11,040.00	Equipment and materials (activity)	Includes CCTV, blinds, UV & emergency lights
Museum fit out - fire alarm upgrade	£10,000.00	£2,000.00	£1,500.00	£300.00	£13,800.00	Equipment and materials (activity)	Includes any actions from the Fire RA
Museum fit out - fixtures & fittings	£30,000.00	£6,000.00	£4,500.00	£900.00	£41,400.00	Equipment and materials (activity)	Includes UV film, desk, racking, till, flooring & kitchen
Signage - museum indoor and out, inc. car park	£15,000.00	£3,000.00	£2,250.00	£450.00	£20,700.00	Equipment and materials (activity)	Includes museum in & out, brown, P&R and Cotswold Way
Septic tank upgrade	£16,666.67	£3,333.33	£2,500.00	£500.00	£23,000.00	Equipment and materials (capital)	Liaise with LT

Evaluation contracted hours	£10,400.00	£2,080.00	£1,560.00	£312.00	£14,352.00	Evaluation	Data gathering based on a day a week for 30 months
Evaluation consultant	£8,000.00	£1,600.00	£1,200.00	£240.00	£11,040.00	Evaluation	Commissioned work to set evaluation framework and feed into evaluation reports based on 40 full days during 30 months
Evaluation costs - materials	£1,000.00	£200.00	£150.00	£30.00	£1,380.00	Evaluation	
Evaluation costs - travel and other costs	£1,000.00	£200.00	£150.00	£30.00	£1,380.00	Evaluation	
Rental waiver for LT	£12,000.00	£0.00	£1,800.00	£0.00	£13,800.00	Full Cost Recovery	
Loss of income due to Tower closure	£8,451.00	£1,690.20	£1,267.65	£253.53	£11,662.38	Full Cost Recovery	
LT running costs	£5,600.00	£1,120.00	£840.00	£168.00	£7,728.00	Full Cost Recovery	Based on 8 months (Mar - Oct)
Project salary costs	£47,045.00	£0.00	£7,056.75	£0.00	£54,101.75	Full Cost Recovery	Includes staff costs (CD, CK, PA, AF, CF, SM, RP & JH)
Premises running costs	£85,003.00	£17,000.60	£12,750.45	£2,550.09	£117,304.14	Full Cost Recovery	
Increased management and maintenance costs (maximum five years)	£31,155.00	£6,231.00	£0.00	£0.00	£37,386.00	Increased costs	

Basement interpretation room - formation	£13,550.00	£2,710.00	£2,032.50	£406.50	£18,699.00	New building work	25% contingency
Basement interpretation room - landscaping	£12,600.00	£2,520.00	£1,890.00	£378.00	£17,388.00	New building work	25% contingency
New gates access from main road - wall alterations	£5,000.00	£1,000.00	£750.00	£150.00	£6,900.00	New building work	25% contingency
New route to grotto - path	£27,000.00	£5,400.00	£4,050.00	£810.00	£37,260.00	New building work	25% contingency
New route to grotto - fencing	£4,800.00	£960.00	£720.00	£144.00	£6,624.00	New building work	25% contingency
New route to grotto - boundary walling	£40,000.00	£8,000.00	£6,000.00	£1,200.00	£55,200.00	New building work	25% contingency
Open up & present grotto - open and repair	£30,000.00	£6,000.00	£4,500.00	£900.00	£41,400.00	New building work	25% contingency
Open up & present grotto - landscape	£10,500.00	£2,100.00	£1,575.00	£315.00	£14,490.00	New building work	25% contingency
Project Director	£100,000.00	£0.00	£15,000.00	£0.00	£115,000.00	New staff costs	5 days a week for 30 months. £40K & 20% on costs
Capital Works Manager	£31,500.00	£0.00	£4,725.00	£0.00	£36,225.00	New staff costs	5 days a week for 9 months £35K & 20% on costs

Admin and Finance Assistant	£50,400.00	£0.00	£7,560.00	£0.00	£57,960.00	New staff costs	5 days a week for 30 months £18K & 20% on costs
Activities Officer	£36,960.00	£0.00	£5,544.00	£0.00	£42,504.00	New staff costs	3 days a week for 30 months £22k FTE & 20% on costs
External lighting installation	£70,290.00	£14,058.00	£10,543.50	£2,108.70	£97,000.20	Other capital work	inc. grotto
Solar panel installation	£9,000.00	£1,800.00	£1,350.00	£270.00	£12,420.00	Other capital work	
Landscaping	£10,000.00	£2,000.00	£1,500.00	£300.00	£13,800.00	Other capital work	
Walkway on flat roof	£70,416.67	£14,083.33	£10,562.50	£2,112.50	£97,175.00	Other capital work	Option B - 3 sides
Ironwork - windows	£51,150.00	£10,230.00	£7,672.50	£1,534.50	£70,587.00	Other capital work	
Ironwork - gates	£8,000.00	£1,600.00	£1,200.00	£240.00	£11,040.00	Other capital work	
Ironwork - handrails	£2,225.00	£445.00	£333.75	£66.75	£3,070.50	Other capital work	
Museum fit out - Retail	£5,000.00	£1,000.00	£750.00	£150.00	£6,900.00	Other capital work	Licence, image, product and kit
Insurance	£4,166.67	£833.33	£625.00	£125.00	£5,750.00	Other costs (activity)	

Financial services	£4,166.67	£833.33	£625.00	£125.00	£5,750.00	Other costs (activity)	
Public consultations	£416.67	£83.33	£62.50	£12.50	£575.00	Event costs	
Transportation and storage of museum collection - storage	£1,404.00	£280.80	£210.60	£42.12	£1,937.52	Other costs (activity)	
Interpretation - other costs inc. accommodation	£1,000.00	£200.00	£150.00	£30.00	£1,380.00	Other costs (activity)	
Community projects - other costs inc. transport	£15,000.00	£3,000.00	£2,250.00	£450.00	£20,700.00	Other costs (activity)	
Internship costs for learning, interpretation, evaluation & marketing	£16,579.00	£0.00	£2,486.85	£0.00	£19,065.85	Paid training placements	Based on 4 full time post for 3 months
Tower repair - scaffold, hoarding & security	£110,000.00	£22,000.00	£16,500.00	£3,300.00	£151,800.00	Preliminary works	25% contingency
Other repairs - scaffold, hoarding & security	£3,000.00	£600.00	£450.00	£90.00	£4,140.00	Preliminary works	25% contingency
Re-presentation of windows - preliminaries, o/heads & profit	£10,000.00	£2,000.00	£1,500.00	£300.00	£13,800.00	Preliminary works	25% contingency

Basement interpretation room - scaffold, hoarding & security	£1,000.00	£200.00	£150.00	£30.00	£1,380.00	Preliminary works	25% contingency
Basement interpretation room - excavations & site prep	£2,250.00	£450.00	£337.50	£67.50	£3,105.00	Preliminary works	25% contingency
Basement interpretation room - preliminaries, o/heads & profit	£5,000.00	£1,000.00	£750.00	£150.00	£6,900.00	Preliminary works	25% contingency
New gates access from main road - scaffold, hoarding & security	£2,000.00	£400.00	£300.00	£60.00	£2,760.00	Preliminary works	25% contingency
New gates access from main road - preliminaries, o/heads & profit	£3,000.00	£600.00	£450.00	£90.00	£4,140.00	Preliminary works	25% contingency
New route to grotto - scaffold, hoarding & security	£2,000.00	£400.00	£300.00	£60.00	£2,760.00	Preliminary works	25% contingency
New route to grotto - preliminaries, o/heads & profit	£10,000.00	£2,000.00	£1,500.00	£300.00	£13,800.00	Preliminary works	25% contingency
Open up & present grotto - scaffold,	£2,500.00	£500.00	£375.00	£75.00	£3,450.00	Preliminary works	25% contingency

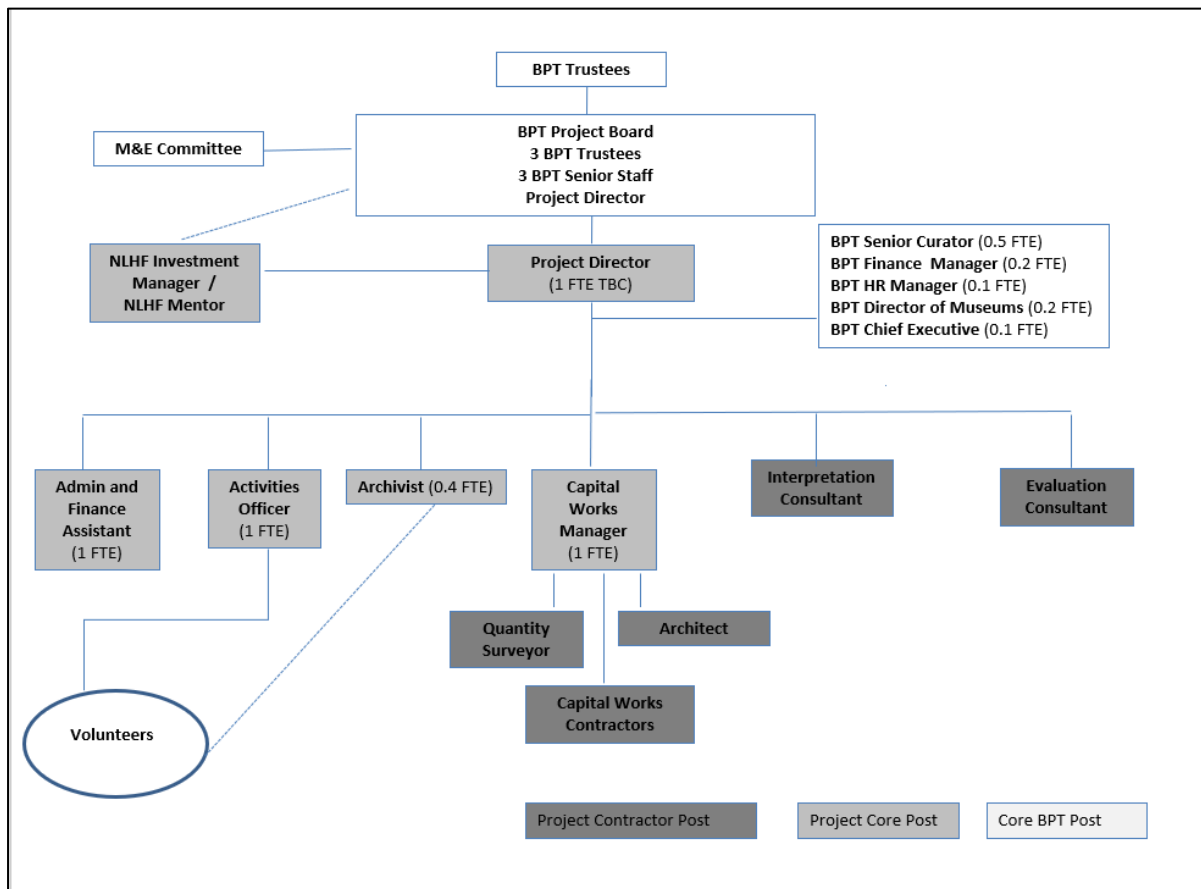
hoarding & security							
Open up & present grotto - preliminaries, o/heads & profit	£6,000.00	£1,200.00	£900.00	£180.00	£8,280.00	Preliminary works	25% contingency
Museum fit out - fees	£5,000.00	£1,000.00	£750.00	£150.00	£6,900.00	Profession Fees (activity)	
Interpretation consultancy	£36,000.00	£7,200.00	£5,400.00	£1,080.00	£49,680.00	Professional fees (activity)	Commissioned work to support int strategy and feed into evaluation reports based on 50 full days during the 30 months
Transportation and storage of museum collection - fees	£7,000.00	£1,400.00	£1,050.00	£210.00	£9,660.00	Professional fees (activity)	
Community projects - fees	£15,000.00	£3,000.00	£2,250.00	£450.00	£20,700.00	Professional fees (activity)	
Apprentice costs for capital works	£19,000.00	£0.00	£2,850.00	£0.00	£21,850.00	Professional fees (capital)	Based on 2 full time posts for 6 months
Professional fees	£52,400.00	£10,480.00	£7,860.00	£1,572.00	£72,312.00	Professional fees (capital)	25% contingency
PR & Events	£15,000.00	£3,000.00	£2,250.00	£450.00	£20,700.00	Event costs	Includes stakeholder engagement
Marketing	£8,333.33	£1,666.67	£1,250.00	£250.00	£11,500.00	Publicity and promotion	
Project blog	£833.33	£166.67	£125.00	£25.00	£1,150.00	Publicity and	

						promotion	
Brand refresh	£5,000.00	£1,000.00	£750.00	£150.00	£6,900.00	Publicity and promotion	New logo
Museum collection - acquisition	£2,000.00	£400.00	£300.00	£60.00	£2,760.00	Purchase price of items or property	
Paddock purchase	£100,000.00	£20,000.00	£15,000.00	£3,000.00	£138,000.00	Purchase price of items or property	
Advertising for recruitment	£416.67	£83.33	£62.50	£12.50	£575.00	Recruitment	
Volunteer recruitment	£416.67	£83.33	£62.50	£12.50	£575.00	Recruitment	
Museum collection - conservation	£9,000.00	£1,800.00	£1,350.00	£270.00	£12,420.00	Repair and conservation work	
Tower repair - lantern & belvedere	£70,950.00	£14,190.00	£10,642.50	£2,128.50	£97,911.00	Repair and conservation work	25% contingency
Tower repair - tower	£30,950.00	£6,190.00	£4,642.50	£928.50	£42,711.00	Repair and conservation work	25% contingency
Other repairs - central building	£22,800.00	£4,560.00	£3,420.00	£684.00	£31,464.00	Repair and conservation work	25% contingency

Other repairs - external doors and windows	£6,900.00	£1,380.00	£1,035.00	£207.00	£9,522.00	Repair and conservation work	25% contingency
Other repairs - internal works	£20,900.00	£4,180.00	£3,135.00	£627.00	£28,842.00	Repair and conservation work	25% contingency
Other repairs - external site works	£16,200.00	£3,240.00	£2,430.00	£486.00	£22,356.00	Repair and conservation work	25% contingency
Re-presentation of windows - block modern windows	£13,500.00	£2,700.00	£2,025.00	£405.00	£18,630.00	Repair and conservation work	25% contingency
Re-presentation of windows - Reinststate original & grilles	£17,200.00	£3,440.00	£2,580.00	£516.00	£23,736.00	Repair and conservation work	25% contingency
Re-presentation of windows - misc. repairs	£1,000.00	£200.00	£150.00	£30.00	£1,380.00	Repair and conservation work	25% contingency
Staff training	£833.33	£166.67	£125.00	£25.00	£1,150.00	Training for staff	
Volunteer training	£1,000.00	£200.00	£150.00	£30.00	£1,380.00	Training for volunteers	
Volunteer expenses	£833.33	£166.67	£125.00	£25.00	£1,150.00	Travel and expenses for	

						volunteers	
Staff expenses	£833.33	£166.67	£125.00	£25.00	£1,150.00	Travel for staff	
Interpretation - travel	£1,417.00	£283.40	£212.55	£42.51	£1,955.46	Travel for staff	
Contingency	£423,778.17	£84,755.63	£63,566.73	£12,713.35	£584,813.87	Contingency	
Volunteer time	£12,100.00	£0.00	£0.00	£0.00	£12,100.00	Volunteer time	
	£2,130,990.83	£361,081.37	£313,160.38	£53,227.56	£2,858,460.13		

4. Management Reporting Structure



5. Project Management Structure

A. Authorised Signatories

Director of Museums and Project Director will be authorised to sign NLHF grant drawdown documents on behalf of Beckford Tower Trust (BTT).

B. Managing the Project

The organisation chart above shows the existing staff members that will be involved in the delivery of the project as well as new staff and contractors that will be appointed as agreed with the NLHF Monitor for the project. In summary the structures and staff involved, and the tasks they will perform, are as follows:-

- **Project Board** - responsible for strategic decision making and monitoring on behalf of BTT, which is managed by its sole Trustee, BPT, which is itself governed by a Board of Trustees also acting as the Trustee of BTT. For this reason, the Project Board is made up of three BPT Trustees (including the Chairman), who have delegated authority to take decisions relating to the project on behalf of the main Trustee body. The **Chief Executive**, the **Director of Museums** and the **Project Director** also sit on this Board.
- **Project Director** - responsible for overall delivery of the project to an agreed brief, co-ordination of the differing elements required such as the capital,

activity, interpretation and conservation / listed building requirements, liaison with Trustees and the NLHF, financial control, programming of the works and reporting progress to NLHF. In addition they will be responsible for management of project staff and the co-ordination of the works with any other key funders. This role will be recruited for during the development stage and take on the project co-ordination for the remaining development and full delivery phases of the project. The Project Director will report to the Project Board and will be line managed by the Director of Museums. This role will be recruited.

- **A Capital Works Manager** - this post will report to the Project Director. They will be responsible for co-ordinating the appropriate staff, consultants and contractors required to deliver the capital works programme. This role will be recruited.
- An **Activities Officer** - this post will report to the Project Director. They will be responsible for co-ordinating the appropriate staff, consultants and contractors required to deliver the learning, community and volunteer activities identified in the Activity Plan. This role will be recruited.
- **Admin and Finance Assistant** will be appointed to support the Project Director with administrative and finance tasks as well as to provide support to contractors and Project Groups. This will ensure that the **Project Director** will have sufficient time to provide input when required to high level discussions and at major decision points as well being involved with stakeholder engagement.
- **Chief Executive** will sit on the Board and oversee project progress, reporting back to Trustees
- **Director of Museums** will oversee the Project Director, monitor project groups and sit on the Board to review project progress and report back to Trustees
- Other contracts will be available to support the **Archive, Evaluation, Interpretation and Capital** work streams.
- Additional backfill to support appropriate staff posts will be appointed, allowing them to contribute to the Interpretation and Activities Group as well as support the work of the Activity Plan.

Person	Task Responsible for	Significant support / input from
Director of Museums	<ul style="list-style-type: none"> • Upward management • NLHF Bid 	Project Board
Project Director	<ul style="list-style-type: none"> • Project Management • Main NLHF BID Round 2 Application Documents and progress reports • Purchase of paddocks • VAT advice • Filming proposals • Insurance • Activity Plan • Financial control, costings and cash flow (operational, with finance team) • Risk register • Access (physical) 	Project Board Project Team BPT core staff

Person	Task Responsible for	Significant support / input from
	<ul style="list-style-type: none"> • Conservation Management Plan (incl. 10 year management and maintenance plan) document for NLHF Round 2 • Interpretation • Visitor experience and facilities • Collections care • Archive project • Evaluation • Procurement 	
Capital Works Manager	<ul style="list-style-type: none"> • NLHF Capital Works Programme • Stakeholder engagement 	Project Director Project Team BPT core staff
Activities Officer	<ul style="list-style-type: none"> • NLHF Activity Plan • Stakeholder engagement • Visitor research • Learning activities & facilities • Community engagement • Volunteers / training • Evaluation • Access generally 	Project Director Project Team BPT core staff Volunteers
Admin and Finance Assistant	<ul style="list-style-type: none"> • Project administration and finance including minutes and documentation/reporting 	Project Director Project Team BPT core staff
Archivist	<ul style="list-style-type: none"> • BPT Archive Project 	Project Director Project Team BPT core staff Volunteers
Architect	<ul style="list-style-type: none"> • Lead consultant on capital works • Capital works plans • Planning application • Listed building application • Surveys • Fire strategy • Building Regs application • Design Access Statement • Structural and M&E Advice (via specialist consultants as appropriate) 	Project Director Capital Works Manager Project Team BPT core staff
Quantity	<ul style="list-style-type: none"> • Project costings 	Project Director

Person	Task Responsible for	Significant support / input from
Surveyor		Capital Works Manager Project Team BPT core staff
Interpretation Consultant	<ul style="list-style-type: none"> • Interpretation plans and associated documentation for NLHF application • Developing style / identity for the Tower 	Project Director Project Team BPT core staff
Evaluation Consultant	<ul style="list-style-type: none"> • Project evaluation 	Project Director Project Team BPT core staff

C. Financial Management

- ***From now until application outcome is released in November*** - initial project costs of £5K required to continue exploratory works and progress the project
- **November** - NLHF will confirm outcome of application
- ***Permission to Start*** - subject to receiving the award letter, which will detail any conditions of the grant, we will be required to fill in a *Permission to Start* form which needs to be accepted and returned before we can claim any grant.
- ***Work prior to permission to start*** - If we start work on the Project before permission to start is received, we do so at our own risk and will only be able to claim grant against it after, and if, permission to start is given. Only invoices dated after the *grant award date* will be accepted. Any costs spent on the Project before that date cannot be included in the project costs and so no grant can be claimed against them. We need to notify the NLHF if we plan to do this in advance of committing to any costs. Costs that we are likely to incur in this way are staff salary costs, the costs of placing advertisements for project staff, the purchase of storage materials for the collection, a proportion of the consultant fees and other sundry items. Trustees are asked to approve the expenditure of these costs so long as they are within the project budget and they do not exceed the money already banked for the project. (These costs will be well within the funds that have already been banked towards the project so there should be no cash flow implications.)
- ***Grant Payment Requests*** - We will be asking NLHF to help with our cash flow challenges, by agreeing to make grant payment requests on a monthly basis

D. Overall Budgetary Control:

Until the NLHF outcome, the Director of Museums will have overall budget control and be responsible for reporting the financial and cash flow position of the project to the Project Board, including producing the following tables / charts / graphs on a monthly basis:-

- Project Costs summary (showing any changes from previous estimates)
- Money committed against money banked, pledged, loan available / reserves
- Cash flow forecasts

All invoices must be counter-signed by them before payment is authorised.

Following award of the grant, this responsibility will transfer to the Project Director.

E. Work Packages:

It is proposed that the Project will be split into manageable sub-projects or work packages, the management of which will be delegated to appropriate staff where applicable. It is intended that Project / Work Package Summary Forms will be created for each sub-project that clearly define the member of staff responsible, the scope of work, budget, programme, lines of reporting, committees / stakeholders that need to be involved and any sign-off procedures required. These will be produced within the Development Phase. For example, it is proposed that the Capital Works Programme will be delegated to the Capital Works Manager who will manage an agreed scope of works within an agreed budget and approval to place contracts, purchase supplies etc. up to a value of £5,000 so long as they are within the agreed cost plan. Any expenditure above £5,000 will need Project Director approval. Those with delegated budgets will be required to provide a cash flow prediction for the work package at the start and inform the Project Director immediately if for any reason cash is found to be required sooner than predicted. No expenditure beyond the agreed budget can be authorised without approval from the Project Director who will ensure that appropriate approvals for the transfer of budget from another package or the use of contingency has been approved by the appropriate authority (whether that be the Project Board, the NLHF or Trustees). All invoices relating to this work will be signed by those with delegated budgets, to confirm they have been checked before being counter-signed by the Project Director for payment.

F. Delegated Limits:

It is proposed that the Project Director has delegated powers to authorise the placing of contracts, appointment of consultants and the purchase of supplies up to £25,000 in value so long as they are within the agreed NLHF budgets and there are sufficient funds either banked or secured via a loan or through the use of reserves to pay BTT's contribution for such contracts, consultants or supplies.

G. Placing and Managing Contracts

We firmly believe that the selection of the right contractor to undertake the works to Beckford's Tower is of paramount importance to the success of the project. The contractor will not be selected on the basis of price alone as many factors will affect the

success of the project. The following, in no particular order, will be taken into consideration in the selection of the contractor for these works.

- Ability to complete on time and within budget
- Relevant experience of contractor and, in particular, of proposed team
- Financial stability of contractor
- Selection and management of sub-contractors
- Price
- Quality of work
- Financial management
- Relationship with previous clients and design teams
- References
- Flexibility of approach
- Ability to work with Client and team to overcome issues that arise during construction
- Approach to working with the Client and design team during final working up of design details
- Approach to training and use of apprentices
- Approach to developing the programme for the works
- Current workload and capacity to undertake this project

Competitive tendering exercises will be used for all new contracts for consultants, contractors and supplies valued over £10,000 to ensure value for money is achieved, taking into consideration proposed fees and quality of service. For contracts less than £10,000, a single proposal may be sought from suitably qualified consultants / contractors / suppliers with a proven track record in that field. The procurement of capital works for the interpretation programme will follow similar procedures. In exceptional circumstances, single proposals may be sought for contracts valued at above £10,000 if there is strong evidence to show that competitively tendering the work would not be in the best interests of all concerned. This will only be done where value for money can still be established and only after prior consultation with, and agreement from, the NLHF. An early tender exercise will be undertaken to select a main contractor to ensure that the feasibility of the build is taken into consideration during detailed design and programming of the capital works. The Architect will act as lead consultant and will report directly to the Capital Works Manager.

The Project Director will retain overall budgetary control for the project, reporting to the Project Board, setting up a system whereby no member of staff can place contracts, purchase goods or make any kind of financial commitment without having prior authority from them. This will primarily be done through the delegation of budgets (with strict controls over how much of the budget is available to spend over an agreed timescale and what the agreed scope of work / deliverable covered by that budget are). A reporting system through the use of purchase orders will be used and these will record expenditure, VAT liability and cash flow implications. All cost headings will be given a unique code. Committed funds, spend to date and predicted final spend will be monitored against the agreed budget for each cost heading. The total committed funds will also be monitored regularly against funds banked and pledged for the project. Initially, these will be reported quarterly to the NLHF Project Monitor though during periods of high expenditure these may be reported monthly.

6. Timescales and Key Milestones - Development (November 2019 - June 2021)

Task ID	Task Name	Duration	Nov-19	Dec-19	Jan-20	Feb-20	Mar-20	Apr-20	May-20	Jun-20	Jul-20	Aug-20	Sep-20	Oct-20	Nov-20	Dec-20	Jan-21	Feb-21	Mar-21	Apr-21	May-21	Jun-21
1	NLHF Round 1 outcome	1 day																				
2	Secure partnership funding	15 months																				
3	Key Milestone – all partnership funding secured																					
4	Partner and stakeholder liaison, including proposed dates for removal of tenants	18 months																				
5	Permission to start & payment request forms sent and confirmation/payment received	1 week																				
6	Project PR released	1 day																				
7	Advertise & recruit staff backfill & project posts/consultants	2 months																				
8	Capital Works Manager to recruit Architect	2 weeks																				
9	Architect to recruit other contractors for Development Phase works (inc. exploratory)	1 month																				
Task ID	Task Name	Duration	Nov-19	Dec-19	Jan-20	Feb-20	Mar-20	Apr-20	May-20	Jun-20	Jul-20	Aug-20	Sep-20	Oct-20	Nov-20	Dec-20	Jan-21	Feb-21	Mar-21	Apr-21	May-21	Jun-21
10	Key milestone – all roles recruited																					
11	Exploratory works for capital programme	3 months																				
12	Key milestone – all exploratory works																					

28	Submit planning permission request	1 day																				
29	In house research to support interpretation strategy	18 months																				
30	Public consultations	1 day																				
31	High profile fundraising event	1 day																				
32	NLHF funds - payment requests	1 day																				
Task ID	Task Name	Duration	Nov-19	Dec-19	Jan-20	Feb-20	Mar-20	Apr-20	May-20	Jun-20	Jul-20	Aug-20	Sep-20	Oct-20	Nov-20	Dec-20	Jan-21	Feb-21	Mar-21	Apr-21	May-21	Jun-21
33	Key milestone - planning permission received																					
34	Prepare final NLHF report (include full evaluation of Development Phase)	3 months																				
35	Key milestone - submit NLHF Application Round 2																					

7. Timescales and Key Milestones - DELIVERY (July 2021 - December 2023)

Task ID	Task Name	Duration	Jul 21	Aug 21	Sep 21	Oct 21	Nov 21	Dec 21	Jan 22	Feb 22	Mar 22	Apr 22	May 22	Jun 22	Jul 22	Aug 22	Sep 22	Oct 22	Nov 22	Dec 22	Jan 23 – Nov 23	Dec 23
1	NLHF Round 2 outcome	1 day	█																			
2	Key milestone – museum and site closes						█															
3	Partner and stakeholder liaison, including proposed dates for removal of tenants	18 months	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█		
4	Permission to start & payment request forms sent and confirmation/payment received	1 week		█																		
5	Project PR released	1 day		█																		
6	Insurance secured	1 week		█																		
7	Financial services secured	1 week		█																		
8	Advertise & recruit staff backfill & project posts/consultants/interns	3 months			█	█	█															
9	Key milestone – all posts in place							█														
10	Advisory panel meetings	1 day			█				█				█				█					
11	Project Board meetings	1 day	█			█			█			█			█			█				
Task ID	Task Name	Duration	Jul 21	Aug 21	Sep 21	Oct 21	Nov 21	Dec 21	Jan 22	Feb 22	Mar 22	Apr 22	May 22	Jun 22	Jul 22	Aug 22	Sep 22	Oct 22	Nov 22	Dec 22	Jan 23 – Nov 23	Dec 23
12	– capital, community, collections/archive, finance & interpretation	1 day			█			█			█			█			█					
13	Activity plan delivery - capital (inc. installation and de-installation of scaffold)	6 months								█	█	█	█	█	█							
14	Key milestone – all capital works complete															█						

28	Activity plan delivery – marketing	3 months																				
29	Key milestones - NLHF progress reports including evaluation submitted																					
30	Set up project blog	1 week																				
31	Final research work undertaken to support interpretation	6 months																				
Task ID	Task Name	Duration	Jul 21	Aug 21	Sep 21	Oct 21	Nov 21	Dec 21	Jan 22	Feb 22	Mar 22	Apr 22	May 22	Jun 22	Jul 22	Aug 22	Sep 22	Oct 22	Nov 22	Dec 22	Jan 23 – Nov 23	Dec 23
32	Paddock purchase	1 month																				
33	Public consultations	1 day																				
34	Revision and implementation of CMP	28 months																				
35	Develop 10 year maintenance plan that includes digital tools, cemetery & landscape	3 months																				
36	Initiate request for listing of the Grotto Tunnel	1 month																				
37	NLHF payment requests	1 day																				
38	Species count	1 day																				
39	Site clearance post capital works (inc. project interpretation & reinstating of tenants)	1 month																				
40	Signage installation (inc. indoor, outdoor, P&R, Brown & Cotswold Way)	1 month																				
41	Key milestone – all major works complete																					

8. The Selection Process

If you are shortlisted and interviewed, references will be sought from previous clients, and a site visit made to a comparable previous project(s) managed by you.

9. Essential Qualities

- In depth experience of converting listed buildings preferably in Bath.
- Experience of display, interpretation and visitor circulation in museums/historic buildings.
- Good track record of cost control and of managing a multi-disciplinary team of professionals.
- Sensitivity to the premises and sympathy for the Trust's aims.
- Ability to form a good working relationship with the Trust.

10. The Broad Vision.

Our vision is set out in the supporting documents mentioned. Its achievement is dependent upon many factors such as planning permission and listed building consent, what can be physically done to the premises, visitor circulation needs, display requirements, fire, health & safety and access requirements and capital and running costs. The Trust will work with the Project Director to refine this brief and our vision, as the project develops.

11. Visitor Issues.

Beckford's Tower currently welcomes about 2,500 visitors a year. Safe access on and off the new flat roof area and new all access tours, is essential to cope with at least double these numbers. The ticket sale and retail point, toilet, basement kitchen and new interpretation spaces including those in the landscape, require careful integration into the visitor route.

12. Re-uniting Beckford's Tower with the landscape.

This Project presents an opportunity to recreate elements of the route originally taken by William Beckford, from Lansdown Crescent to the Tower. The use of public transport routes with signage incorporated, as well as integration with the Cotswold Way and creation of a new footpath through Lime Avenue, the Grotto Tunnel, Paddocks and Cemetery, to the Tower, form essential aspirations of this project. The Project Director will need to consider and advise to what extent the reconnection between the Tower and its landscape will necessitate works to the fabric and services of the museum and its surroundings. Any works will need to be timed to minimise loss of visitor and rental income.

13. Scope of the works.

The Project Director will be required to organise and manage all of the survey, design and implementation works necessary to deliver the completed project including environmental, lighting, display and interpretation requirements, and to commission and

manage other appropriate professionals. The Project Director will need to show awareness that future running costs need to be carefully considered during the design development.

14. The Trust's Representative.

The Director of Museums, will be the Trust's representative. They will be member of the Project Board and will contribute to some of the work stream groups, also updating the Museums and Education Committee and Board of Trustees. Further details about this Group are set out in the governance documents.

15. Site Access

Keys to the site will be released to the successful post holder.

16. Available information.

The Trust has a recent building survey of Beckford's Tower and costed works from a Quantity Surveyor, as well as historical information about the premises which are available for inspection at Beckford's Tower.

17. Fee Quote.

Proposed fees should be quoted as a % of the total cost of the works. Preference is likely to be given to proposals which include an incentive to control fees.

18. Provisional Timetable.

Your submission should include a provisional timetable.