



**South West Heritage Trust
Heritage Landscape Project
NLHF Second Round Development Phase**

Brief for NLHF Delivery Application Project Coordinator & Bid Writer

1. Introduction

The South West Heritage Trust (the Trust) wishes to appoint an appropriately experienced consultant to coordinate its National Lottery Heritage Fund (NLHF) Second Round development phase and to write the NLHF delivery grant application for a nationally important heritage project.

Submission of the NLHF delivery grant application is targeted for November 2026.

2. Organisation Background

The South West Heritage Trust was founded in 2014 as an independent charity for Somerset, Devon and the South West. We deliver museum, archive and historic environment services previously provided by Somerset County Council, and archive services previously provided by Devon County Council.

Our vision is to 'celebrate and protect the rich heritage of the South West, helping to ensure its contribution to society now and in the future, and to strengthen communities, inspire learning and enrich lives.'

Our work is guided by the Trust's '*Building for the Future: A Strategy for 2025-30*', which is supplemented annually by the detailed actions set out in the Trust's Business Plan, service plans and other plans.

3. Project Background

This nationally important site in Somerset witnessed one of the key turning points in early English history. It contains significant heritage from the Iron Age, Anglo-Saxon and medieval periods.

The site is a Scheduled Ancient Monument, is currently in private ownership. The owners are now intending to sell the site but wish for it to be preserved and protected for the nation. The Trust is working with Somerset Council to raise the funds to acquire the site to bring it into public ownership, to improve and increase public access to it and to deliver a community engagement programme to increase participation in the site's extraordinarily rich heritage. The proposed freehold acquisition would be by the Council, then by way of a long lease to the Trust who would manage and be responsible for the site.

4. Project Aims

The project is aiming to acquire the outstanding nationally important historic site and the surrounding ancient landscape to bring it into public ownership and to protect it for the nation. The project will:

- Acquire 60 acres of Scheduled Ancient Monument land.
- Conserve heritage structures.
- Provide public access to the site through improved infrastructure
- Create a new public access route to the memorial to replace the existing Permissive Right of Way that will cease upon sale of the freehold.
- Construct a second footbridge to connect the site with a local long-distance footpath.
- Create and install tracks and pedestrian gates around the site for public access.
- Create and deliver site interpretation that is sensitive and appropriate to the historic landscape setting.
- Develop and deliver a public engagement programme including on-site events, activities in the community and the creation of digital resources.
- Work with Somerset Wildlife Trust, the Environment Agency and others to identify and protect the site's special habitats and to increase biodiversity.
- Undertake archaeological research to fill in gaps in our knowledge and to increase understanding of this historically outstanding site.
- Develop and deliver a publicity programme to raise public awareness of the importance of the site and to build interest in visiting.
- Provide opportunities to trial and test new operating models and methods in how the Trust's landscape sites are managed, maintained and monitored to enable the Trust to improve how it captures, proves and demonstrates outcomes and impacts from its work in this area of its business portfolio.

5. Outline of Work

The NLHF Project Coordinator/Bid Writer will oversee and advise the client on work required for the NLHF Second Round Development Phase to ensure it meets NLHF Approved Purposes and that it meets the intended November 2026 submission deadline. The role will include:

- Advise and support the client in coordinating and preparing documentation required for NLHF Permission to Start.
- Advise and support the client in commissioning and managing consultants undertaking key pieces of work and preparing reports and plans required for the NLHF Second Round application. This is expected to include: Activity Plan, Evaluation Plan, Conservation Management Plan and Capital Works, Management and Maintenance Plan, Fundraising Consultant.
- Coordinate with the project team to detail how the project will meet NLHF funding outcomes and agree outcomes with client.
- Attend monthly Project Team meetings to report on progress, to provide expert advice to the client regarding the NLHF development phase process and requirements, and to seek decisions as required.

- Review NLHF commissioned work and input into the development of these plans and documents. Ensure proposed costs are reflective of NLHF requirements (e.g. in respect of delivery phase evaluation) and actively highlight if they are not.
- Advise and support the client in coordinating/writing other Supporting Documents required for the Second Round application, such as delivery phase detailed costs, timetable and risk register.
- Identify any gaps or areas where additional work is required to ensure all documents are compliant with the needs of the NLHF.
- Support the client in writing NLHF development phase progress reports and prepare for and attend NLHF progress meetings.
- Prepare for and attend Development Review and take follow-up actions required.
- Prepare draft NLHF Second Round application for client approval.
- Amend as required and prepare for submission, including uploading all documents required to the NLHF portal.
- Submit final NLHF Second Round application.
- Assist with queries from NLHF arising during the Second Round assessment process.

6. Essential Requirements

- Significant practical experience of coordinating and writing NLHF delivery grant applications and match funding applications for major projects including Supporting Documents required by NLHF.
- Significant demonstrable success of securing NLHF delivery funding and match funding for major heritage projects, including landscape projects.
- The consultant must have a sound understanding of NLHF's four investment principles under its 10-year strategy, Heritage 2033, and their application to this project.
- Capacity and flexibility to commence the assignment immediately following appointment and to successfully complete the assignment by November 2026.
- The consultant must hold professional indemnity insurance.

7. Fee

The budget for this contract is up to **£15,000** including expenses plus VAT if applicable.

Payment terms to be staged payments in arrears. Schedule to be agreed with the successful tenderer.

Work patterns must be flexible and adjustable to accommodate project deadlines and meetings.

8. How to Apply

Tenders should take the form of a short, written proposal (maximum 10 sides of A4) setting out:

- Your interest in undertaking this assignment.
- Suitability to undertake this work, with examples of relevant previous work that demonstrates your skills, knowledge, understanding and experience of working on NLHF-funded projects of a similar type and scale.
- How you would add value to the project.

- Your proposed methodology and lump sum fee to undertake the work, including all expenses and VAT if applicable. Please specify your day and hourly rate and how many days you have included for within your fee bid proposal.
- Details of two referees for whom you have conducted similar services over the past five years.

Please also include a copy of your CV (maximum two sides of A4).

9. Tender Timeframe and Process

- Tender responses to be submitted by email to Ann Bradford by 5.00 pm on 1 June
- Interviews, if required, will take place in w/c 8 June
- Start date is expected to be mid-June.

10. Tender Evaluation

Tender scoring criteria will be on the basis of:

- 30% for price
- 50% for quality/experience/methodology
- 20% for added value

11. Decision and Award

South West Heritage Trust reserves the right to negotiate with the preferred bidder and to award all, part or none of the contract.

12. Copyright

The copyright of any materials produced during the contract will rest with the Trust.

13. Contact Details

If you have any queries in advance of submitting a tender please contact: Ann Bradford, HR and Governance Manager, South West Heritage Trust. Tel: 07961674134; Email: ann.bradford@swheritage.org.uk