



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

Brief for Activity Plan Consultant

1. Introduction

South West Heritage Trust wishes to appoint an experienced Activity Plan consultant to develop a detailed Activity Plan to support its National Lottery Heritage Fund (NLHF) Second Round delivery grant application for a nationally important heritage landscape 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 and 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

Working closely with the Trust, partners, audiences and other project consultants, the consultant will research and develop a full NLHF Activity Plan with accompanying Activity Action Plan in accordance with NLHF good practice guidance.

The role will include:

- Review and follow up on ideas and outline proposals for project activities developed for the NLHF First Round application.
- Undertake thorough audience and stakeholder research & consultation and audience development to evidence community need / want for activities to inform the activity plan proposals.
- Identify existing, potential and target audiences.
- Contribute to development of site interpretation, ensuring that proposals will meet a broad range of audience needs and learning styles identified through activity planning.
- Write an Event Management Plan (EMP) template for small, medium, and large scale onsite events. Demonstrate all logistics have been considered including hired

infrastructure, permissions for use of local facilities (toilets etc), crowd management, site mapping for appropriate infrastructure siting.

- Engage and work with an access advisory group to feed into the EMP, looking at how to make onsite activity as inclusive as possible.
- Identify opportunities to link to existing Trust projects and teams - including the Chew Valley Hoard project.
- Develop, cost and agree detailed plans for project activities, including visitor number forecasts, in consultation with audiences, partners, volunteers and other stakeholders. Proposals must be environmentally responsible.
- Preparation of Activity Plan and Activity Action Plan in accordance with NLHF guidelines, which meets the funding priorities for this project and the Approved Purposes of the development grant.
- Coordinate with evaluation consultant to inform development of Evaluation Framework and to plan appropriate data collection and activity monitoring for the delivery phase.
- Attend NLHF Second Round Project Team meetings and NLHF Development Phase Review as required to report on progress and to seek decisions.

The work will be undertaken during the project's development stage and should be completed by November 2026 when we expect to submit our delivery phase application to the NLHF.

6. Essential Requirements

- The consultant must be fully conversant with the detailed activity plan guidance set out on the NLHF website and have a sound understanding of NLHF's four investment principles under its 10-year strategy, Heritage 2033, and their application to this project.
- Significant practical knowledge and experience of audience development, audience/stakeholder consultation, activity planning and of writing and costing NLHF Second Round activity plans, including in respect of landscape projects.
- Experience of planning and co-creating activities with a wide range of audiences and of developing activities for vulnerable and disadvantaged groups and hard-to-reach audiences.
- A strong understanding of the principles of equality, diversity, inclusion and access in relation to all aspects of the project in line with the Trust's Audience Development Strategy and Equalities Strategy.
- Capacity and flexibility to commence the assignment immediately following appointment and to successfully complete the assignment by November 2026.
- The consultant will be required to have public liability and professional indemnity insurance.
- The consultant must have an independent means of travel to undertake site visits/local research and consultation as the site is not served by public transport.

7. Fee & Methodology

The budget available for this assignment is up to **£12,000** 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@swheritage.org.uk and richard.brunning@swheritage.org.uk by Friday 3 July 2026.
- Interviews, if required, will take place w/c 6 July 2026.
- Start date is expected to be mid July 2026.

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 Richard Brunning, Senior Historic Environment Officer, South West Heritage Trust. Tel: 07961 674126; Email: Richard.Brunning@swheritage.org.uk