



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

**Brief for Conservation Management Plan, Capital Works Design and
Management & Maintenance Plan Consultant**

1. Introduction

The South West Heritage Trust (the Trust) wishes to appoint an appropriately experienced consultant to prepare a Conservation Management Plan, to develop capital works proposals, and to prepare a Management & Maintenance Plan to submit as part of its Second Round grant application to the National Lottery Heritage Fund (NLHF) for a nationally important heritage landscape project. The role includes preparing and submitting any required statutory consent applications.

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. Operating across sites in Somerset and Devon, we care for and make publicly available over 10 million archives, over three million museum objects and over 450 acres of historic landscapes.

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, which 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.

The location of the site will be revealed to applicants in confidence upon request.

We have already secured a NLHF First Round pass and are now putting together a team of consultants and other specialists to work with us to develop the Second Round delivery phase application and supporting documents. A match funding strategy is also in development, with planned approaches to include Historic England.

Work being undertaken by others during this phase includes site archaeological, ecological and tree risk surveys; site access audit; development of an Activity Plan and site interpretation proposals; development of 5-year income and expenditure projections for the site after project completion; project evaluation framework.

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 a Grade II listed heritage structure.
- Work with an adjacent landowner to construct a footbridge to provide public access to the site.
- Create a new public access route to the heritage structure 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

5.1 Conservation Management Plan

- Drawing on the summary Condition Survey of the Grade II heritage structure undertaken for our First Round application, and on the findings of site archaeological, ecological and tree risk surveys (these three pieces of work have all been commissioned separately in advance of commissioning this assignment and will be made available to the successful tenderer), the consultant will coordinate and produce a **single integrated site Conservation Management Plan** prepared in accordance with NLHF's Conservation Management Plan guidance and which identifies costed actions for the delivery phase of the project. The plan will also need to reference and take into account the requirements of potential project match funders, including Historic England.
- The plan will review all the current knowledge of the cultural heritage resource (archaeology and built heritage) on the site, will assess its significance, and will identify aspects that require further research, to aid management and understanding of the site.
- The plan's primary focus will be on the nationally significant below ground archaeological remains and the Grade II listed heritage structure, but other landscape and ecological benefits identified in the specialist surveys, including the existing ecological condition of the site and its potential for enhancement and optimal future management, should also be considered and included. It is anticipated that the three specialist surveys will then be included in full in the NLHF application as supporting documents to the Conservation Management Plan.
- The Conservation Management Plan should also identify areas where further research is required to more fully understand the scheduled site and its setting.

5.2 Capital Works Design

- The consultant will then develop and prepare costed proposals for the conservation, repair and other capital works to be undertaken during the delivery phase, which clearly identifies how the capital proposals will meet NLHF investment principles and those of potential match funders, including Historic England.
- The primary focus will be the design and costing of conservation and repair works required to the Grade II heritage structure and the pedestrian gates needed around the site for public access and wayfinding signage; the two new footbridges are to be designed and costed separately by specialists appointed directly by the client, with the intention being to combine the results into a **single integrated Capital Works Design Report** for submission to NLHF and other funders.
- The role also includes preparing and submitting any required statutory consent applications for the project's capital works.

5.3 Management and Maintenance Plan

- The final output required is the production of a **single integrated site Management and Maintenance Plan** developed in accordance with NLHF good practice guidance. The plan should set out what is being managed and maintained, what advice has been taken to develop the plan, and what resources

and interventions are needed to look after NLHF's investment for ten years after completion of the project, including routine/cyclical maintenance requirements and detailing maintenance tasks needed and the frequency and methods required. The revenue costs identified through this work will be used to inform 5-Year income and expenditure projections that will be submitted with the NLHF Second Round grant application.

The consultant must coordinate closely with client teams and with other project consultants on proposals for site public access, interpretation, project activities and ongoing public engagement, project evaluation and ongoing management and maintenance to ensure an integrated approach to the project's development.

The consultant, along with other project consultants, will also be required to input to the work being led by the client's Head of Development and Partnerships on how this project will inform 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.

6. Essential Requirements

- Significant practical experience of coordinating and writing Conservation Management Plans, capital works proposals and Management and Maintenance Plans for NLHF-funded projects or projects of similar size and scale, including those that encompass more than one kind of heritage (in this case: archaeology, landscape and historic structures).
- Significant experience of preparing management plans for complex archaeological sites.
- Significant experience of preparing and submitting Listed Building Consent and Scheduled Monument Consent applications.
- A sound understanding of NLHF's four investment principles under its 10-year strategy, Heritage 2033, and their application to this project.
- A sound understanding of investment principles of match funders including Historic England.
- A good and practical understanding of how the different elements of a NLHF Second Round application need to be aligned and to work together.
- Used to and comfortable working collaboratively with other project consultants and client teams to develop compelling joined-up NLHF Second Round applications.
- 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 professional indemnity insurance.
- The consultant must have an independent means of travel as the site is not served by public transport.

7. Fee

The budget for this work is up to **£20,000** 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 20 sides of A4) setting out:

- Suitability to undertake this work, with written and illustrated examples of relevant previous work that demonstrates your skills, understanding and experience of working on NLHF-funded projects of a similar type and scale.
- A proposed team structure with names of team members and a short statement for each person demonstrating relevant experience and qualifications (maximum 150 words per person).
- Details of any sub-consultants/third party services that you will commission.
- Methodology, identifying how you would approach this assignment, key delivery stages, milestones and dates.
- 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 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.

9. Timeframe and Process

- Tender responses to be submitted by email to richard.brunning@swheritage.org.uk by 10 July 2026.
- Interviews, if required, will take place on 14 July 2026.
- Start date is expected to be by late July 2026.
- Draft proposals to be submitted to the client by 12 October 2026 for the NLHF Development Phase Review
- Final reports by 1 November 2026.

10. Tender Evaluation

Tender scoring criteria will be on the basis of:

- 30% for price
- 60% for quality/experience/methodology
- 10% 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