



Yeovil Town Council



Consultancy Brief

South Somerset Heritage Collections Project

Yeovil Town Council, in partnership with South West Heritage Trust, is seeking to engage heritage consultants to undertake an options appraisal and initial feasibility study to find a sustainable location for the South Somerset Heritage Collections and realise the potential of the collections to inspire and engage audiences.

1. Background

Yeovil Town Council is responsible for safeguarding the South Somerset Museum Collection under an agreement with Somerset Council. In December 2024, the South West Heritage Trust (SWHT) entered a five-year agreement with the Town Council to provide heritage, museum and archive services.

The South Somerset Heritage Collection is a historic collection that includes 30,000 objects and 6,000 photographs reflecting the story of Yeovil and South Somerset. The collection tells the story of the area's people and places through its extensive archaeology, social history and industrial collections. The collection is housed in a museum store with Accredited Museum status and includes a diverse range of items, from Roman mosaics to Yeovil Town Football Club programmes. A collection of items relating to the gloving industry is of particular significance to the area.

The collection is currently housed at Lufton Depot in Yeovil, a Somerset Council-owned site in Yeovil. The storage arrangements with Somerset Council are due to end and suitable alternative storage is now required. Somerset Council and Yeovil Town Council are committed to the collection's long-term future and public accessibility and are looking at future options for the storage and access to the collections and the creation of a museum in Yeovil.

This is a partnership project, with Yeovil Town Council acting as lead partner. The aims of the project are:

- To secure the long-term future of the South Somerset Heritage Collections.
- To celebrate, preserve and share stories about Yeovil and South Somerset's heritage.
- To increase public access to South Somerset's heritage through a sustainable model that inspires curiosity and creativity and supports lifelong learning, community wellbeing and participation, social inclusion and civic pride.
- To support the mission and values of Yeovil Town Council by encouraging participation and access, working in partnership, and promoting the wellbeing of the people of Yeovil.
- To build local stakeholder support and engagement.

2. Delivery and Outputs

Yeovil Town Council, in partnership with South West Heritage Trust, is seeking to engage consultants to undertake an options appraisal and initial feasibility study to develop a business case, project brief, vision and objectives for the South Somerset Heritage Collections project. The project will be approached in two phases, as outlined below:

Phase One: Project Strategic Definition – Museum and Collection Store Options Appraisal (RIBA Stage 0)

Key areas of focus include:

- Strategic and heritage review
- Collections and storage requirements
- Museum and public engagement (identify audience, audience needs and sustainable engagement model)
- Identify strategic options and undertake an options assessment against an agreed framework
- Capital and revenue modelling
- High level capital cost estimates
- Governance, risk and organisational resilience

Outline of work:

- Information review
- Stakeholder consultation
- Draft options appraisal report
- Options appraisal with clear recommendations
- Financial model (editable format)
- Final report suitable for submission as supporting evidence to the National Lottery Heritage Fund
- Executive summary (suitable for funders)

The options appraisal study must clearly demonstrate:

- A clear project brief, vision and objectives
- A business case including heritage need, public benefit, an outline business model, outline project costs, timeline and funding strategy for the preferred option(s).

Timeframe:

4 months

Date	Milestone
15 October 2026	Contract goes out to tender
2 November 2026	Tender deadline
18 November 2026	Presentations and Interview for Final Assessment
20 November 2026	Consultant appointed

Week commencing 23 November 2026	Start-up meeting, milestones agreed
8 January 2027	Stakeholder consultation complete
15 February 2027	Draft options appraisal report presented to Somerset Council, Yeovil Town Council, South West Heritage Trust
1 March 2027	Final report
March 2027	Presentation to Yeovil Town Council

Following the report and presentation members of Yeovil Town Council will be asked to decide whether there is an option they wish to advance to Phase Two. Should members decide not to proceed the project is expected to conclude and the contract will end.

Should members approve an option for Phase Two development:

Phase Two: Preparation and Briefing - Museum and Collection Store Feasibility (RIBA Stage 1)

Key areas of focus will be clarified through the options appraisal and may include:

- Site analysis
- Planning/conservation
- Business planning
- Costs
- Concept designs
- Programme
- Outline project budget
- Interpretation/design/audience engagement strategy
- Consultation
- Market analysis

Outline of work:

- Site surveys
- Cost benefit analysis
- Business plan and business case development
- Concept/technical designs to RIBA 1
- Business case development
- Development of outline project budget
- Initial risk assessment
- Building stakeholder engagement and support through an agreed framework of consultation.
- Finalise the project brief and programme
- Feasibility study report

Outcomes:

The feasibility study report must demonstrate a clear strategic vision that delivers the project's strategic ambitions, is financially and operationally viable, considers heritage needs and demonstrates market demand.

Timeframe:

To be determined through the Phase One Options Appraisal and funding strategy with work expected to be completed within 2027.

3. Procurement

Essential requirements:

The appointed consultant/team must demonstrate:

- Significant experience of supporting successful National Lottery Heritage Fund capital project applications, undertaking options appraisals and feasibility studies within a cultural heritage context and knowledge of NLHF's four investment principles.
- Proposed team structure chart and brief biographies
- Museum and collections storage planning expertise
- Knowledge of UK Accreditation standards
- Knowledge of organisational governance and risk management
- Experience in capital cost planning and financial modelling
- Stakeholder engagement and consultation capability

Fee:

Consultants will be appointed for both project phases, with a break clause at the end of Phase One. The expected fee for Phase One is in the region of **£20,000–£25,000**, and for Phase Two **£50,000–£70,000**, including expenses, plus VAT if applicable.

How to apply: Applications should take the form of a Tender response (maximum 30 sides of A4) to include:

- Outline your suitability to undertake the work, with case studies of comparable or relevant projects that demonstrate your understanding and experience of delivering similar projects.
- Methodology - identifying how you would approach the work, key delivery stages, milestones and dates.
- A proposed team structure chart 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.
- Fee proposal, including all expenses and VAT if applicable, for Phase One and Phase Two of the project, with a breakdown of costs for each phase. Please specify your day rate and the number of days included in your fee proposal for each phase.

Your submission should be emailed to recruitment@swheritage.org.uk by 9am on 2 November 2026. Any submissions received after this time will not be accepted. If you have

any questions regarding the process or brief, please contact us via

Estelle.gilbert@swheritage.org.uk.

Selection criteria:

Relevant experience and track record – 30%

Experience of delivering comparable museum, heritage, options appraisal and feasibility work, including examples of relevant projects and outcomes.

Methodology and understanding of the brief – 30%

Understanding of the project aims, heritage context, collections/storage issues, stakeholder engagement, and proposed approach to delivering both phases.

Team capacity and capability – 20%

Suitability of the proposed team, including relevant expertise, roles, availability and ability to deliver within the required timeframe.

Price – 20%

Overall value for money based on the fixed-fee proposal, including expenses and VAT if applicable.

The assessment panel is:

- Amanda Card – Chief Executive / Town Clerk, Yeovil Town Council
- Adam Burgan – Director of Culture, Yeovil Town Council
- Tim Cook – Director Property & Community, Yeovil Town Council
- Estelle Gilbert - Head of Museums and Engagement, South West Heritage Trust