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**Technical Project Manager Brief**

**Development and Delivery Phases**

1. **Introduction**

Ripon Museum Trust (RMT) was established in 1982 and runs three museums in the heart of Ripon. We are a small Registered Charity and Limited Company. RMT tells the story of poverty, law, crime, punishment and justice - using a Grade II Victorian Workhouse Museum, Grade II\* Liberty Gaol and Police Station, Grade II\* Georgian Courthouse, and a collection of 9000 objects to explore our themes. Community engagement helps us share stories of this unique heritage prompting people to act for a fairer society. We tell the story of the buildings themselves, the people who lived and worked in them across all three sites. We put learning at our heart - delivering a changing programme of exhibitions, events, school visits and informal group learning. **Learning is a key Value for RMT – whether directly delivering learning activities, supporting learning within our communities or as continuous organisational learning**. RMT is an Accredited Museum and a Band One National Portfolio Organisation (NPO) with Arts Council England (ACE).

**Our Trust’s Vision** **is to use our Heritage Assets to Inspire People to Seek a Fairer Society**. Our Museums’ Mission is to use the unique trio of the Workhouse, Prison & Police and Courthouse Museums, collections and the stories they tell to help people explore big issues such as fairness, equality, justice and welfare. Through excellent engagement, programming and outreach, together we will inspire people to become compassionate and active citizens, shaping society for the better. We will work for greater participation in our heritage which will enrich lives and improve wellbeing. Volunteering is integral to our organisation; at our core we work as one team. We will make a positive impact on Ripon and the region’s cultural and economic capital.

Ripon Museum Trust is an equal opportunity employer and adhere to Fair Recruitment policies and practices. We welcome applications from all suitably qualified persons regardless of their race, sex, disability, religion/belief, sexual orientation, gender orientation or age. We have an Equality and Diversity Policy, Safeguarding Policy and procedures and Data Protection Polices. We are committed to reducing our carbon footprint and have an Environmental Policy.

1. **Ripon Museum Trust: Inspiration for a Fairer Future Project**

Our ‘Fairer Futures’ Project is worth £2.25M and is a substantial first step to delivering our ‘Master Plan’ for the Trust’s future. Delivery of this Project will make significant strides towards achieving our Vision, transform the visitor experience and our engagement work with communities. It will create inclusive new spaces in the Workhouse Museum, open up previously unseen rooms and make our heritage accessible to a wider more diverse audience across all three museums. The Project will use joined up stories of the people who lived, worked and suffered at our three sites. We will make better use of our outdoor spaces and of digital techniques for more immersive engagement. The Project will secure our future and lower our carbon footprint through environmentally sustainable building improvements. The idea for our Project was born out of unease with growing social inequalities which have been exacerbated by the pandemic. A powerful new Vision for the use of our heritage emerged; to use it to inspire people to seek a fairer society. Over the last 3 years we have continued to develop these ideas and we have consulted widely. Our Project has six key strands:

**Conservation** of key areas of the Workhouse i.e. Main Block (recently acquired with a Heritage Lottery Fund grant). Conservation work will provide us with new spaces for activities, interpretation and learning. A lift will give access to the former dormitories which will be restored. We will prioritise eco-friendly design; a new roof, an air source heating system and improved insulation will all reduce our carbon footprint and help us become more resilient. Access to and conservation of these areas will ensure preservation of the stories and heritage for the future.

New **interpretative techniques** will connect stories and visitor experiences across all three museums. With communities we will tell multi-layered stories of those who lived and worked here, bringing the story up to date. We will create a better-quality visitor experience, use digital and other interpretation for outdoor spaces at the Workhouse, improved internal spaces for learning, volunteering and other programming.

**Community engagement** and co-production will build on our work with people whose voices are often invisible in history. There will be exciting opportunities for new activities at all our museums engaging new people and communities and for placemaking. These build on our work as a NPO and the unique projects we have already delivered.

Our work to improve **Wellbeing** will be built into our activities and reflects our ambition to be become a place that demonstrably improves people’s wellbeing.

**Volunteering** is at the heart of what we do, and we will expand and build on this work.

The value of our work on **placemaking** will increase by generating community wellbeing. We’ll build on successful partnerships to develop activities to better explain our heritage. The Project will feed into master planning for the regeneration of Ripon’s economy and bringing a wider sense of history and place.

1. **Brief for Technical Project Manager**

**Purpose**

Ripon Museum Trust (RMT) seeks to appoint a Technical Project Manager (either a sole trader/freelancer or from a project management company) for the duration of the project through to 2026 to advise and assist the staff and Trustees. This is not a full ‘turnkey’ project management role in the Development Phase - the consultant will be expected to oversee (with senior RMT staff supporting) recruitment of five consultancies (Business Planner, Architect, Activity Planner, Evaluation Planner and Interpretation/Designer), compliance, cost control, programme and payment claims during the Development Phase. Working with and mentoring the RMT staff, trustee and volunteer teams to provide relevant reports to the National Lottery Heritage Fund. There is a one day per week Administration Officer to support the role in-house. The Technical Project Manager will oversee the delivery of a high-quality project on time and within budget.All plans must be designed and delivered within the overall capital and revenue budget set for Fairer Futures project. There will be a break clause between the Development and Delivery phases of our Fairer Futures project. We will also consider tenders just for the Development Phase. The role in the Delivery Phase expands. Overall the Technical Project Manager will deliver the following:

* Assist with the preparation and task management of the programme for the capital works and activities during both phases using MS Project or similar software.
* Oversee the work of all the members of the Project Team.
* Provide the necessary compliance data to enable successful and timely grant claim submissions
* Manage and report risk
* Liaise with the Director to ensure that technical compliance and quality of work go hand-in-hand.
* Ensure all tasks are completed according to the overall deadlines for the Mid-term Review and Delivery phase submission

**Requirements of the commission (Development Phase – RIBA 1-3)**

* Write the Project Execution Plan
* Assist the Director and Project Board to recruit, select and appoint consultants
* Work with the Project Board to issue contract briefs
* Advise on document control and information management systems with the RMT Staff Team
* Work with the Project Board to set up a dynamic risk register to ensure clear communications between the Project Board and contractors
* Oversee and manage cost control and manage variations with the Design Team and client
* Chair as required (and oversee the minutes with the support of the Admin Officer) of the Project Team meetings (either in person or virtually)
* Work with the Director to provide required information for the regular Progress Reports to National Lottery Heritage Fund, mid-term review meeting and Project Board
* Work with RMT staff to provide information required for making grant claims to the National Lottery Heritage Fund and support the Director at regular progress meetings and with the mid stage review
* Advising on the contractual, legislative, and statutory requirements for the Project
* With the Business Planning Consultant check and give an opinion on the achievability of the underlying evidence base and assumptions on which the overall plan is predicated and soundness of the sensitivity analysis and commercial proposition.
* With the Director and Project Board, take an overview and comment on the overall achievability of the aggregate proposals from other consultants
* Run regular risk workshops with the team and Board
* Oversee the delivery of a high-quality project on time, within budget to deliver the vision and objectives of the project.

**Requirements of the commission (Delivery Phase – RIBA 4 – completion)**

* Contract management for all consultants in the Project including the Architect-led Design Team
* Work with colleagues to appoint the main construction contractor
* Maintain a project control system (including a dynamic risk register) to ensure clear communications between the Trustees and contractors
* Deliver agreed quality outcomes within the project plan timetable and budget, consistent with the vision and objectives of the project
* Work with Design Team and other colleagues to recruit, select and appoint the main contractor
* To issue contract briefs and manage the selection and appointment process
* Ensure the delivery of capital and activity plans are fully integrated
* Prepare reports to each grant provider as required by them in terms of format and frequency, to be signed off by Trustees as the accountable body
* Ensure legal, contractual and statutory compliance either directly or through advising other responsible colleagues
* Assist the Architect with the preparation of a ten year Management and Maintenance Plan
* Ensure that the QS maintains cost management procedures in order to ensure financial control and issues monthly cost reports to the Client’s representative
* Attend regular Project Team meetings (either in person or virtually)
* Work with the Director to provide required information for the regular Progress Reports to National Lottery Heritage Fund
* Work with the Director to provide required information to report to Project Board
* Work with RMT staff to provide information required for making grant claims to the National Lottery Heritage Fund
* Attend regular Project Boards (as scheduled within the Outline Programme – see attached)
* Work with the Architect and Design Team to ensure compliance and project completion within National Lottery Heritage Fund guidance
* Run regular risk workshops with the team and Board
* Work with the Design Team and QS on snagging and the final account

**Management**

The Technical Project Manager reports to the Chair of the Project Board and is managed on a day to day basis by the Director. Consultants will chair regular Project Team meetings (preferably virtually to save time and costs). All interdependencies between other consultants’ briefs stated must be taken into account. As many meetings as is practical should be held online to save costs and using cloud based management software. There are 7 hours per week of Admin support funded by National Lottery Heritage Fund.

**Other appointments within this Project**

Architect and Design Team (including Conservation Plan Consultant) in Development Phase and (subject to a break clause) Delivery Phase (including Principal Designer, Main Contractor) – managed by Director

Business Planner (Development Phase) – managed by Director

Fundraiser (Development Phase) – managed by Director (recruited by RMT)

Evaluation Consultant (Development and Delivery Phase) – managed by Community Curator

Activity Plan Consultant (Development Phase) – managed by Community Curator

Interpretation and Fit-out Consultant (Development Phase) – managed by Community Curator

**Timescales**

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| --- | --- |
| **Activity** | **Target dates** |
| Advertise | 11 Aug 2022 |
| Tender submission deadline | Midnight Sunday 4th Sept |
| Tender evaluation /invitation to interview | 9th/10th Sept |
| Interviews | 15th or 16th Sept 2022 |
| Approval/Sign off to appoint | w/c 19th Sept 2022 |
| Appoint and start up  | 3rd Oct 2022 |
| Development Phase Contract completed  | November 2023 |

The Technical Project Manager will be required to deliver work flexibly depending on the agreed requirements of the Project Programme. Initial periods of contract procurement and initiation will require more input than other periods of monitoring and delivery in the Development Phase. More time requirements are expected in the Delivery Phase. The Development Phase is expected to finish on submission of a Delivery Phase bid in November 2023

The Delivery Phase is expected to start after the National Lottery Heritage Fund give Permission to start in the first quarter of 2024. The capital works are expected to start in Spring/early Summer 2024 with handover of the building expected second half of 2025 for fit out and completion by Spring 2026.

**Fee**

There is a budget up to £12,375 plus VAT in the Development Phase and (subject to the break clause and successful submission of a Delivery Phase bid to the National Lottery Heritage Fund) £29,166 plus VAT in the Delivery Phase. All travel/subsistence for both Phases are included in the fee. Virtual meetings will be held where possible to keep costs down. There is administrative support from RMT. Tenders for just the Development Phase are also accepted.

A break clause will be invoked with one month’s notice before the agreed submission deadline of the Delivery Phase bid currently this is programmed for November 2023.

**Submission requirements**

Tenders should include

* Essential: A clear description of your proven track record of, and approach to, managing this kind project to quality standards, time and budget – list out 3 similar projects in terms of value and type you have led within the last 3 years and the role your consultancy played within those projects
* Desirable: a list of 3 projects in the heritage and conservation sector in the last 3 years
* Essential: Which IT packages you have experience using and at what level for project management, collaboration, and electronic communication
* Essential: Recent examples of your experience and approach to managing budgets and project budget reporting
* Essential: Recent examples of your experience of and approach to procurement – list out procurement projects undertaken, and the consultancy role played within those projects.
* Desirable: Recent examples of experience, awareness and approach working within the museum sector
* Essential: Your approach to delivering our Programme including key milestones

Essential: Provide evidence of Insurances required – Professional Indemnity of £2m, Public Liability of £5m, Employers’ Liability £5 million

* Essential: Proposed fee structure with a breakdown of day rates. Travel time for site visits should be clearly set out and are included in the total fee.
* State your availability for interview on the dates above 2022
* Essential: CVs (4 pages each) for key team members including membership of relevant professional bodies and adherence to professional standards
* Contact details for at least two referees
* Maximum Tender page length 10 pages.
* Tenders must be signed by CEO, business owner or equivalent senior representative of the Consultancy.

**Selection Information**

* Selection will be based on a Price/Quality Scoring split of 30%/70%. Quality is an equal split between Experience and Approach.
* Panel Interviews on site
* References
* Sign Off by the National Lottery Heritage Fund

**Additional Information**

Tenderers must keep their tenders open for 90 days. RMT is committed to procuring goods, works and services locally whenever possible and in an environmentally responsibility manner. We are committed to equality and diversity and will assist tenderers to gain access to the process. We will use guidance from the National Lottery Heritage Fund (NLHF) for the creation of Briefs and Contracts.

Tenderers must provide tenders including:

1. Non consideration form of tender
2. Tenderer’s warranties
3. Confidentiality Clauses
4. Freedom of information Statement
5. Environmental Responsibility Policy

**Appendices**

Project organisational chart.

RMT staff organisational chart.

Outline Programme

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