

TULLIE

Carlisle's home of culture

Tullie House Museum and Art Gallery Trust

Project Tullie:

Invitation to Tender for

Project Management Services

May 2025

Contents

Summary	3
1.0 Introduction: Tullie House Museum and Art Gallery	4
2.0 Project Tullie	5
2.1 Overview	5
2.2 Project Tullie Planned Phases	6
2.3 Project Tullie Phase 3	7
3.0 Scope of Services.....	8
4.0 Indicative Programme	10
5.0 Procurement budget, process and timescale	11
5.1 Procurement budget	11
5.2 Procurement process - ITT Response.....	11
5.3 Procurement timescale	12
6.0 Award Criteria	13
7.0 Appendices list	14

Summary

Tullie House Museum and Art Gallery Trust (the Trust) in Carlisle (brand name: Tullie) is seeking to procure project management services for the next phase of Project Tullie – Phase 3: Breaking Down Barriers. This next phase will see a major redevelopment of the main museum galleries (850sqm), includes the decant and movement of over 100,000 collection items from stores, alongside the construction of a new learning studio within the Grade I & II listed museum site.

We seek project management services with relevant qualification, experience, and skills to manage the capital works and coordinate into the fit-out packages for the delivery of RIBA work stages 4-7.

It is intended that the services will be directly appointed by the Trust as the Client.

The award of this contract is subject to approval by our funding partners, The National Lottery Heritage Fund.

The full proposed scope of services set out in Section 3.

Contact Point	Graeme O'Dowd, Technical Manager, graeme.odowd@tulliehouse.org
Value	£30,000
Closing Date for Submission	By 12noon Friday 6th June 2025
Tender Delivery Address	Amy Errington, Programme Coordinator, amy.errington@tulliehouse.org

Please note, the materials and information supplied to the Trust at point of submission, along with any subsequently supplied information, shall be held in the strictest confidence by the Trust.

Tendering companies will have a licence to use the documents and information provided by Tullie as part of this ITT for the purposes of preparing a tender but will acquire no other right in respect of the documents or information.

Tendering companies should ensure that they review the full contents of the associated documents and fully comply with the ITT.

Site Visits can be arranged by appointment through Graeme O'Dowd via graeme.odowd@tulliehouse.org. All visits to take place on Wednesday 28th and Thursday 29th May.

Interviews will be held on Wednesday 25th June 2025. Please leave this date free for an invitation. Interviews will be carried out in person at Tullie (Castle Street, Cumbria, CA3 8TP).

1.0 Introduction: Tullie House Museum and Art Gallery

In 1890 the sale of Old Tullie House – which dates from the late-seventeenth century and was facing demolition at that time – seemed an ideal opportunity for those who wanted to create a cultural hub for Carlisle. This included local architect and antiquarian Charles J Ferguson who saw the house, with all its history and fine architecture, as an ideal core for a new free museum, library, and school of art. Using public donations, Ferguson bought the house for the city with the intent to create a new public facility. Following this act of civic philanthropy, Tullie House was officially opened as an ‘Institute of Science and Literature and Art’ on 8 November 1893. As the 20th century progressed, the School of Art and the Public Library relocated – the former becoming the Institute of the Arts, now the University of Cumbria. Tullie, with its collections growing at a significant rate, expanded, and developed in 1990 and 2000 to create the major resource that it is today.

As Carlisle’s most important visitor attraction, Tullie has, for over 130 years, built a national and international reputation for its collection and exhibitions, particularly those relating to the archaeological and natural history of the Border region. From its nineteenth-century origins, Tullie has been a civic endeavour, striving to bring together learning, creativity, and public engagement for the people of Carlisle and beyond.

Tullie House Museum and Art Gallery Trust was established as a charity in 2011 to manage Tullie House Museum on behalf of the people of Carlisle and Cumbria. In 2016 the Trust created a Manifesto to help connect the museum with its audiences, to identify a common purpose and establish an ambitious direction. The Manifesto was refreshed in 2021 (Appendix 1) and today forms the basis of all our work along with the following two strategic priorities: financial sustainability and community engagement. The ‘Project Tullie’ Futureplan was conceived to support Tullie’s ambition to weave community engagement and financial resilience together so that Tullie can develop its role, connect better with its audiences, and deliver inspiring and popular programmes.

Tullie is the largest museum in Cumbria and cares for almost one million cultural artefacts and uses these to engage, inspire and educate residents and visitors to Cumbria. Over 200,000 visitors, and 14,500 school children engage with the museum each year and through partnership working the Trust provides leadership for all 23 Cumbrian museums. A third of Tullie’s visitors are from the local community, a third regional and a third national or international. Tullie is important to a wide range of users and is a significant part of the social and economic life of Carlisle and the wider region. Tullie has several permanent galleries, an award-winning temporary exhibition and learning programme and runs an extensive range of events and engagement activities. It is an Accredited Museum operated by an independent charitable trust and receives core funding from Cumberland Council and National Portfolio Organisation funding from Arts Council England (ACE). In 2019, the Natural Sciences Collection received Designated status by ACE as a collection of national significance.

Despite Tullie being an important community resource and an integral part of Carlisle’s heritage and townscape, the current buildings and spaces prevent the Trust from being fully able to deliver the Manifesto and respond to the changing needs and interests of today’s audiences.

Tullie’s Vision:

“Tullie will help Carlisle and Cumbria be a thriving place for everyone. Our collections and programmes will bring people together, growing social capital, confidence, and creativity. They will make this a better place to live and work and strengthen our identity and pride.”

Our Mission:

“Tullie is the heartbeat of Carlisle’s cultural life. We use our collections and programmes to inspire engagement and creativity in the heart of our community.”

2.0 Project Tullie

2.1 Overview

Project Tullie aims to transform this vital heritage and community resource into a world-class destination to help deliver the Trust's aspiration for Tullie to become the cultural heart of Carlisle, Cumbria and the Borderlands. The Futureplan, developed since 2019, and informed by extensive consultation and research, aims to transform the much-loved museum into a thriving and dynamic hub for heritage, community engagement and wellbeing. Through Project Tullie, the aim is to create a more resilient and sustainable organisation by revealing the potential of the buildings and increasing the amount of collections on display.

Project Tullie will rationalise existing spaces, allowing for more of our significant collections of archaeology, art, geology, natural and human history to be shared and displayed, whilst also providing spaces for new indoor and outdoor experiences. We will co-develop galleries, both new and refurbished, to create vibrant and dynamic spaces in which collections, people, stories and contemporary connections will be front and centre.

This project will enable Tullie to grow and diversify audiences, increase financial sustainability, and contribute to the city and region's profile and impact.

Responding to the challenges faced by the Museum Trust, the Project Tullie Futureplan identifies a series of improvements to Tullie, which will enable it to fulfil its vision. Ultimately the Futureplan aims to deliver:

- Improved entrance with single main entrance/exit and building connectivity
- Remodelled central welcome area with enhanced visibility of collection
- Redevelopment of currently empty and dilapidated historic buildings on Castle Street
- Fit-for-purpose, accessible and integrated learning and community spaces with modern facilities
- Refurbished and expanded catering and events spaces
- Renewed retail offer
- Refurbishment of all existing 1990s galleries
- Development of a new Roman-themed Children's Experience
- Relocation of onsite collection stores to create new public gallery spaces
- Refurbishment of original Old Tullie townhouse and gardens

2.2 Project Tullie Phases

Summary of Phase 1: *The Costume Collection at Tullie House (complete)*

In 2021 the Museum delivered a new permanent display of its costume and textile collection in two Victorian galleries that were 'lost' in the 1990s redevelopment. The galleries were restored to reveal the architectural heritage and improve environmental conditions to exhibit fully conserved nationally important collections with deep local roots.

Summary of Phase 2: *Welcome and entrance, new gallery, and studio space (complete)*

Funded by DCMS/Arts Council England, The Town Deal, and The Future High Streets Fund. This project has recently completed in Spring 2025.

Project Tullie Phase 2:

- provides a modern and efficient welcome and orientation area
- delivers a new gallery celebrating Carlisle and its place in world history
- connects to and repurposes some of the adjacent historic Castle Street buildings to unlock more space in the museum, provide vital on-street visibility, and create innovative and accessible new community space.

Summary of Phase 3: *Breaking Down Barriers (this project)*

We have now secured the full funding package to enable the delivery of Phase 3. The principal funder is The National Lottery Heritage Fund.

Project Tullie Phase 3 will:

- Create a new Active Gallery, through the redesign of the museum's principal exhibition spaces, the 1990s Border Galleries. The project will convert this 850sqm space into a dynamic, flexible gallery which can support a changing programme of activity and support the display of 100,000 collection items.
- Create a new learning suite by refurbishing and extending an unused stable block located in the museum's 'Secret Garden' and connecting this to the main museum site via a connecting corridor and toilet block.
- Improve collections storage facilities and collections management

2.3 Project Tullie Phase 3

Breaking Down Barriers is Phase 3 of Project Tullie, the museum's capital development programme which reimagines Tullie's legacy as Carlisle's centre for learning and creativity for today's audiences.

Our recent award from The National Lottery Heritage Fund, and our success with match funding from a range of partners, allows us to progress the delivery phase of Project Tullie Phase 3, with works to complete RIBA Work Stages 4-7.

Developed with significant input from the local community, the project will create new studio space for Tullie's popular school and community programmes, improving the connectivity and functionality of the historic buildings and 'secret' walled garden.

The project responds to audience demand to see more of Tullie's nationally significant collections by refreshing the existing 1990s galleries to reveal more than 100,000 collection items for the first time through an innovative 'Active Gallery' approach.

Accompanied by a rich programme of events and activities, changing trails and displays, *Breaking Down Barriers* will deliver a transformational visitor experience for Tullie with something new to see at each visit.

Active Gallery:

We will create an 850sqm new Active Gallery – the centrepiece of Tullie's visitor experience and the catalyst to transform the way we engage with audiences.

- We will deliver the largest redisplay of the historic collection in Tullie's history. Collection items will be moved out of unsuitable and inaccessible stores and into climate-controlled public galleries, where they will have enhanced accessibility for the public, school groups, curators and visiting researchers.
- We will invite our community and visitors to become active participants and effect change in this dynamic and fluid new gallery, delivering sustained interest and relevancy.
- Digital trails will guide visitors around the gallery, providing greater immersion into the collections' stories and a rich programme of participatory activities will bring the collection to life in new ways, facilitated by our passionate volunteer gallery engagers.

Learning Suite:

Drawing inspiration from Tullie's 19th century founding principles as Carlisle's centre of arts, learning and knowledge we will create a modern and accessible learning suite which will:

- Alleviate the demand for more space in which to grow our over-subscribed learning and community activity programmes
- Increase connectivity and functionality of the existing museum building
- Improve access to the Museum's 'Secret Garden', a vital green space in which schools and community groups can experience nature and learn about biodiversity.

Project activities will also include:

- Collections preparation work
- Staff, Trainee and Volunteer recruitment, training and support
- Activity delivery, advocacy and consultation
- Updated Marketing and Comms Strategy, Business Plan, Conservation Management Plan and Management and Maintenance Plan
- Project Evaluation

3.0 Scope of Services

The Trust is looking to procure project management services for the next phase of Project Tullie – Phase 3: Breaking Down Barriers. This next phase will see a major redevelopment of the main museum galleries (850sqm), includes the decant and movement of over 100,000 collection items from stores, alongside the construction of a new learning studio within the Grade I & II listed museum site.

We seek project management services with relevant qualification, experience, and skills to manage the capital works and coordinate into fit-out packages for the delivery of RIBA work stages 4-7. The project management services will need to support the client project team until full opening of the new spaces. The project management services will also need to have an understanding of the project Activity Plan to support the client project team coordinate project development activities.

The successful consultancy will be appointed by the Trust (the Client) and be expected to work alongside the client project team and the external project team, comprising:

- Design Team:
 - Architect, De Matos Ryan
 - Principal Designer, De Matos Ryan/Ridge
 - Structural & Civil Engineer, Price & Myers
 - M&E Consultants, P3R
 - Contract Administrator, De Matos Ryan
 - Cost Consultant, Appleyard & Trew
- Exhibition Design Team inc. Project Management: The Creative Core

Main services and key deliverables:

- Management of the capital works and coordination of the fit-out packages for the delivery of RIBA work stages 4-7.
- Procurement of main contractor and fit-out contractor
- Oversight and coordination of the collections decant, recant and the installation of the collections with an understanding of collections care.
- Support procurement and contract arrangements for external storage of collections.
- Management of project insurance cover and provision.
- Management of Landlords consent process.
- An understanding of the Activity Programme and coordination of information for funders.

Project Management and co-ordination:

- Implement a project delivery framework in agreement with the Client.
- Review design outputs and scope of works for project team members, contractors, or external professional services, advising where appropriate further services are required.
- Manage and co-ordinate the full external project team through the project delivery stages.
- Support contract administration and management for the external project team.
- Ensure that the external project team/contractors deliver agreed services to the agreed programme and within agreed budgets.
- Ensure that all required outputs for funding partners are delivered to meet agreed deadlines.
- Agree service delivery KPIs with client and attend KPI review sessions with client every 4 months (3 times a year). KPIs to align with the scope of services and criteria as set out within this ITT e.g. quality of information, meeting programme deadlines, meeting social and environmental targets.

Project Management framework:

- Arrange and lead monthly client and external project team meetings.
- Minute the above meetings and issue minutes within 5 working days of the meetings.
- Record agreed actions and proactively follow up on actions, logging and reporting back on progress.
- Lead stage gateway reviews and manage the input of the external project team.
- Ensure all outputs of the external project team are of the quality and detail required for the respective work stages.
- Manage and store project documentation on an agreed digital platform e.g. Microsoft SharePoint

Programme Management:

- Lead and deliver an overarching master programme for regular team review.
- Ensure all statutory consents are identified on the master programme and submitted to agreed timescales.
- Lead programme review sessions understanding all interdependencies to take the project to full completion.

Project Procurement:

- Support the development of tender documentation for services to be procured, including the main contractor and the fit-out contractor.
- Support the setting of procurement programmes and procedures, follow public procurement regulations, along with the terms and conditions for procurement of the grant award from The National Lottery Heritage Fund.
- Support the client and the external project team with arranging or attending site visits or interviews for prospective suppliers/contractors where necessary.
- Support the coordination and delivery of tender evaluation reports alongside the QS services, for approval by the client and funding partners as required.

Risk Management:

- Identify project risks and report these into the client project team.
- Review the project risk register and pro-actively manage project risk with the client project team.
- Report project risk items to the external project team and identify routes to mitigate identified risks.

Cost Management:

- Have an overall understanding of full project costs.
- Liaise closely with the project Cost Consultant and lead on any value engineering exercises as and when required in relation to construction and coordinating in to fit-out.
- Support the client project team to manage the construction budget.

Change Control:

- Implement and manage change control procedures and ensure that the client project team is fully aware of the implications of any changes to the project scope, including for funding partners.
- Ensure cost implications are understood, communicated, and agree through the procedures, implementing a clear decision-making process.
- Ensure key decisions are documented and communicated.

Reporting and communications

- Manage the issue of project reports from the external project team to the client in advance of monthly Project Team meetings.
- Provide information to the client project team for the purpose of funder progress reports and claim requests.
- Attend project governance meetings, such as the Project Tullie Project Board and Trust Board, along with meetings with invested parties, such as The National Heritage Lottery Fund, to support the client project team to report on project progress.
- Support the client project team through monthly project review meetings.
- Attend on-site meetings when required.

General

- Pro-actively provide expert advice to the client project team at all stages of the project.
- For the duration of the contract period provide insurance cover with a minimum of £5m public liability and £5m professional indemnity.
- Inform and agree with the client any proposed changes to the project management services team, for example, through staff changes.
- Exercise professionalism, good judgement and apply confidentiality when required in the delivery of services.

The Scope of Services for the above are to be in line with the RIBA Standard Agreement Schedules for all disciplines. The conditions of appointment are to be in line with the RIBA Standard Conditions of Appointment.

4.0 Indicative Programme

	Planned start date	Planned complete date
Phase 3 Permission to start (Delivery Phase)	October 2024	April 2025
RIBA Stage 4a – Technical Design: Base build	December 2024	April 2025
RIBA Stage 4b – Procurement: Base build	April 2025	Sept 2025
RIBA Stage 4a – Technical Design: Exhibition	February 2025	July 2025
RIBA Stage 4b – Procurement: Fit-out	July 2025	October 2025
RIBA Stage 5 – Construction	October 2025	March 2026
RIBA Stage 6 – Exhibition Fit-out	March 2026	June 2026
RIBA Stage 6 – Collections / Client fit-out	July 2026	September 2026
RIBA Stage 6 – Snagging / Handover	October 2026	October 2026
RIBA Stage 7 – Completion and open to public	October 2026	

5.0 Procurement budget, process and timescale

5.1 Procurement budget

The budget for professional fees only, to deliver the scope of works is initially budgeted at £30,000 (excluding VAT but including all expenses).

A payment schedule, based on project milestones, will be agreed with the successful consultant.

Project costs:

Total budget for construction & fit-out (for information only)	
Item	Construction & fit-out value (£)
Basebuild	£1.3m
Fit-out	£1.2m

Note: The construction values exclude contractor prelims, OH&P, contingency and inflation.

5.2 Procurement process - ITT Response

This is an open competitive tender led by Tullie House Museum and Art Gallery Trust.

Your response to the Invitation to Tender should include the following:

- A written response of no more than 10 sides of A4 to the information within the criteria as outlined in Section 6.
 - Please provide project examples with testimonials where possible. Please use recent and relevant projects, as outlined in Section 6.
- Please provide details and CVs of the individuals / team members, including subcontractors (if any) who would be engaged on the project, should you be successful. Include who the main point of contact will be, as well as indication of how they will report to the Client.
- Using the form provided (Appendix 3: Fees and Resources Schedule), please provide a proposal for Fees and Resourcing (including reasonable expenses, but exclusive of VAT) for the team to deliver the schedule of services found in Section 3.
 - Please ensure that your fees include for any reasonable expenses, disbursements, material, or print outs that Tullie may require.
- Using the spreadsheet provided (Appendix 4: Fees Cashflow), please provide a proposed schedule of days, and the day rate of each member of the team who will be involved in the delivery of these services in RIBA Stages 4-7.
- Copies of 2 years business accounts.

Any enquiries relating to this ITT should be submitted to graeme.odowd@tulliehouse.org by 12noon Friday 30th May 2025.

Your ITT response must be submitted to amy.errington@tulliehouse.org by 12noon Friday 6th June 2025.

5.3 Procurement timescale

Invitation to Tender (ITT) issued	12noon Wednesday 7 th May 2025
Site visits	Wednesday 28 th – Thurs 29 th May 2025
Enquiries submission deadline	12noon Friday 30 th May 2025
ITT response deadline	12noon Friday 6th June 2025
ITT evaluation and shortlisting	Monday 9 th June – Wednesday 18 th June 2025
Interviews	Wednesday 25th June 2025
Contract start date	Monday 7 th July 2025

6.0 Award Criteria

Proposals will be assessed on a best value, 70% quality / 30% price ratio.

The 30% price ratio will be assessed with a score attributed to 25% for price quoted and 5% for suggested resources given, as set out in Appendix 3 'Fees and Resources Schedule' and Appendix 4 'Fees Cashflow'.

The 70% quality will be based on the information submitted against the below quality criteria:

	Area	Question	% Weighting
1	Company Standing	Please provide background to your company and detail the skills and experience that your company has, and their relevance to delivering the Scope of Services (Section 3).	10%
2	Skills, Knowledge, Experience	With reference to recent (last 3 years) experience of delivering comparable projects (experience of relevant funders/sector/scope/cost), please outline what Skills, Knowledge and Experience you/your company will bring, including lessons learned, to project management services for delivering the Scope of Services (Section 3).	20%
3	Approach and Methodology	Please outline how you will approach the delivery of project management services for Project Tullie, with specific reference to methodology, collaboration style, communications, and ways of working. Specifically including liaison with client project team, coordination of design teams, reporting to key stakeholders, budget management and environmental sustainability.	25%
4	Team	Please outline the profile of proposed team members, highlighting what specific relevant individual skills and experience each will bring to Project Tullie. Please also attach full CVs of all proposed team members demonstrating relevant skills, experience, and qualifications.	10%
5	Social Value	The Trust is committed to supporting Carlisle and the city region in promoting social value through all its work. Please outline what social value outputs and outcomes you will seek to deliver, and any prior experience your team has with engaging the community to further benefit their projects.	5%

Tullie House reserves the right to:

- Make no appointment.
- Negotiate the scope and fee for the works with a preferred supplier.
- Suggest to preferred consultants the substitution of any proposed sub-contracted consultants.
- Extend the commission to further stages of work by negotiation and within the terms of the UK Public Procurement Regulations 2015.

Please note:

- The award of this contract is subject to the approval of our funding partner The National Lottery Heritage Fund.

7.0 Appendices list

Appendix 1	Tullie Manifesto and Vision
Appendix 2	Site Information
Appendix 3	Fees and Resources Schedule
Appendix 4	Fees Cashflow