



CORNWALL BUILDINGS  
PRESERVATION TRUST

## INVITATION TO TENDER

*‘A Low Carbon Future for Duchy Palace’*

## BRIEF FOR A DIGITAL STRATEGY CONSULTANT

May 2023



Funded by  
UK Government





# CORNWALL BUILDINGS PRESERVATION TRUST

## 1. Summary

Cornwall Buildings Preservation Trust (CBPT) wishes to appoint a Digital Consultant to develop a Digital Strategy and Action Plan for the Trust. This will also include the creation of an interactive virtual tour to improve online access to Old Duchy Palace, which is located in Lostwithiel.

The commission is scheduled to begin in October 2023 and is expected to last for 6 months. It is part of a larger project called 'A Low Carbon Future for Duchy Palace' that is being funded by grants from the Shared Prosperity Fund and National Lottery Heritage Fund.

The consultant will report direct to our Chair.

## 2. About Cornwall Buildings Preservation Trust

Established in 1973, CBPT is a Charitable Incorporated Organisation. We are a small county-based trust whose objectives are to preserve, conserve and enhance the special interest of buildings in Cornwall for the benefit of present and future generations. Our powers include purchasing, leasing and maintaining buildings, facilitating public access and education.

In recent years our energies have been focused on the care and maintenance of Old Duchy Palace (ODP) in Lostwithiel. We hold a long lease on this important medieval building. Now, CBPT would like to be able to move on to new projects. We want to work with local partners on significant historic industrial, commercial or institutional buildings that are currently at risk due to their poor condition and/or vacancy but have the potential to be conserved and re-purposed for long term business or community use.

CBPT is currently small in scale with a Board of 7 Trustees. We have no paid staff and do not maintain an office for meetings; we mostly conduct our business online. We have only a basic website set up by local company Piebald and very simple data storage through Google.

We are using grants to grow our capacity through this Digital Consultancy and a parallel Business Development Consultancy.

## 3. Project Background and Aims

The brief for this consultancy has been informed by strategic planning work carried out during 2022 for the Trust by South West Growth Services (SWGS). The concept of the interactive virtual tour for ODP originates with the Trustees themselves.

The CBPT's aim is to review all the digital technologies we use and develop a Digital Strategy and Action Plan for the Trust that underpins our Business Resilience and development needs. The consultant needs to audit our current digital resources, systems and capability to create a Digital Strategy and Action Plan. The overall Digital Strategy and Action Plan should build on Piebald's work and take cognisance of the SWGS recommendations – our need to network, build a Customer Relationship Management system and make the route to donations more accessible. Our current assessment of the Trust's digital capabilities on the attached Digital Maturity matrix is around 1.5; we want to move up at least one level as a result of the Strategy and Action Plan.



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As part of the Digital Action Plan, we would like to create an interactive virtual tour of ODP with historic information and interactive elements. This project will require instruction of a specialist sub-contractor. The aim of this subsidiary commission is to provide virtual access to ODP with imbedded information and links to further resources to be provided by CBPT.

ODP has been described as one of the most important secular buildings in Cornwall. The virtual tour should enable access for those who are not able to visit in person, whilst providing educational resources to enhance the information presently available online, and specifically the ODP webpage on our website. This project aims to transform ODP into a sustainable heritage attraction operating at the centre of the local community.

#### 4. Key tasks and responsibilities

The consultancy will support the Trust in updating the website with improved digital content. This will help us attract new audiences to ODP and interest in CBPT. The consultant will be responsible for ensuring the delivery of key outcomes as outlined below. They will work closely with the Business Development Consultant and Trust Chair:

- Review CBPT data strategy and storage, currently on the Google G-Drive and agree any organisational changes whilst ensuring that we meet requirements set out within our GDPR Policy.
- Review, in consultation with trustees, all digital technologies used by the Trust to carry out our work, including how they are configured and used.
- Facilitate and inform a discussion with trustees on the scope for digital innovation to increase the capacity of the Trust to help improve our business resilience.
- Produce a Digital Strategy and Action Plan for the Trust, including providing or arranging training where needed for Trustees, to improve the Trust's Digital Maturity score. The Strategy and Plan should provide outputs that are achievable from 2024 through to March 2028. The proposals should not involve excessive ongoing costs or dependence on external support.
- Set out a programme to deliver outputs in the Action Plan and Strategy. Build and deliver the interactive virtual tour of ODP.
- Work closely volunteers/locals/historians etc. to produce articles for website and virtual tour – stories of ODP, Lostwithiel and the history of the Trust, etc.
- Update the Trust website in line with accessibility standards, industry best practice, funders' requirements and improve search engine optimisation.
- Include Cornish language content and ensure that key points on the website and virtual tour are in both languages (as is the case with the existing exhibition boards in the undercroft).
- Make other changes to improve site navigation and layout when requested.
- All work should comply with National Lottery Heritage Fund digital requirements.

Activities and resources will incorporate:

- Good practice examples from across the sector, including accessibility.
- Opportunities to maximise audience development and community engagement.



- Feedback and evaluation. There must be a method of recording hits on the updated website and usage of the Virtual Tour.

## Audiences and Stakeholders

- Visit Cornwall
- Lostwithiel Museum
- Potential ODP visitors and those interested in the Trust
- Prospective tourists to the Lostwithiel area
- Audiences further afield or those who may be unable to visit in person but have an interest in the ODP and the Trust, to include schools.
- ODP tenant.

## 5. The consultant should be able to demonstrate the following skills:

	Essential/Desirable
Experience of project management in a design environment	E
Able and effective communicator (verbal and written)	E
Excellent interpersonal skills	E
Able to work alone/remotely and as part of a team	E
Able to demonstrate team-working ethos and strong motivation skills	E
Significant experience with WordPress sites	E
Experience of community or partnership working	D
Experience of initiating and developing digital projects, using historical materials, buildings or collections	D
Previous experience working with museums and/or heritage websites	D

If you are an individual, you must be registered (or willing to register) as self-employed and be responsible for your own tax status and National Insurance contributions. You must be able to provide sufficient information to enable the CBPT, who have a lease of and manage the ODP, to confirm a clear Disclosure and Barring Service disclosure within the 18 months preceding May 2023.

## 6. To Apply

We know that many digital strategists also work in web builds and we welcome applications from individuals or partnerships.

Submit a written response to the brief of no more than 6 pages providing information on:

- People: Details of the individuals that will undertake this work highlighting how they meet the requirements set out above at section 5. Specify who will be the lead consultant.
- Experience: Three relevant examples of where you have undertaken similar work in the past
- Approach: Outline your response to the brief above and how you will approach the different phases of the work.



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- Budget breakdown: A breakdown of time allocated for each element of your programme and a total cost including expenses.
- References: Contact details from two projects you have undertaken that we can contact for a reference

Indicative timescale:

Publication of invitation to tender:	21 May 2023
Acceptance period for tenders:	22 May – 30 June 2023
Review of tenders and interviews:	1 July – 30 August 2023
Appointment of consultant, begin initial brief:	Mid-September 2023
Start of appointment:	October 2023
Consultant provides Digital Strategy and Action Plan:	February 2024
New website material and Virtual Tour go live:	March 2024

We have an indicative budget of £13,000 - £16,000 including VAT, with the expectation to complete work within 6 months of October 2023, allowing for holidays/stakeholder availability. Submissions will be assessed on a best value basis against the following criteria:

- Evidence of demonstrable understanding of the brief
- Track record of the Consultant in similar commissions
- Robustness of proposed methodology for undertaking the commission
- Value for money
- Consultancies based within Cornwall, the Isles of Scilly, Plymouth or West Devon i.e. within the surrounding Tier 2 Levelling Up areas are preferred
- Consultants offering student training opportunities or volunteering opportunities to help build the Virtual Tour/additional website content for Old Duchy Palace are preferred.

Your fee proposal must state if it includes VAT or not, and state any extras like cost of domains etc. We require a fixed price quote.

Send this information with your CV and a covering letter detailing your relevant skills and experience via email to [CBPTrust@gmail.com](mailto:CBPTrust@gmail.com) by 30 June 2023.

Interviews will be arranged, remotely, if necessary, around July 2023.

## 7. Supporting Information included with this brief

- National Lottery Heritage Fund Digital Guidance for Projects: See: [Digital guidance for projects | The National Lottery Heritage Fund](#)
- Digital Maturity Matrix (November 2022, below, current levels highlighted)
- CBPT Low Carbon Project Summary (November 2022, below)



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Digital maturity competencies	Level 1	Level 2	Level 3	Level 4	Level 5
<b>01. Culture</b>	Sceptical	Respectful	Participative	Inclusive	Evangelical
	Staff are wary of digital and try to avoid it.	Staff are happy that specialists are dealing with digital.	The organisation understands the value of digital and wants to learn more.	Digital is seen as key to success and incorporated into everything.	Digital is the principal way to engage supporters and achieve the mission.
<b>02. Leadership</b>	Minimal	Restricted	Supported	Elevated	Intrinsic
	There's no clear digital leadership at any level.	The digital lead is confined to a mostly tactical role.	The digital lead is encouraged to be strategic, when time allows.	A senior digital lead exists, and digital leadership is actively invested in.	Digital is an integral part of the overall strategy and digital leadership is present at all levels.
<b>03. Budget</b>	Survival	Maintenance	Experimenting	Growth	Sustainable
	The budget only covers the bare essentials, such as website hosting.	The budget supports the current setup but doesn't allow for improvements.	The budget allows for the testing of new ideas in priority areas.	The budget supports increasingly digital ways of thinking and doing.	A healthy budget for the ongoing evolution of digital operations increases impact.
<b>04. Innovation</b>	Deprioritised	Ad hoc	Small-scale	Coordinated	Embedded
	Innovation is not considered important, or is not happening at all.	Innovation occasionally happens as part of existing projects.	There is innovative re-imagining of some aspects of products or services.	Joined-up innovation is evolving the organisation.	A structured innovation programme is creating transformational change.
<b>05. Capacity</b>	Responsibility	Expertise	Team	Function	Capability
	One person looks after the website and email. They may not have a digital background or skillset.	Basic digital functions are covered by people with specialist skills and experience.	There's a central team of digital specialists, with some digital delivery in other teams.	There's a senior digital lead and a team, with growing digital opportunities in other teams.	Senior digital leadership exists across the organisation with effective delivery teams.
<b>06. Recruitment</b>	Essential	Specialist	Generalist	Prevalent	Pervasive
	There's a focus on technical skills for the role looking after the website.	Specialist digital skills are included in certain roles that support engagement.	Broad digital skills are required for jobs all around the organisation.	Strategic digital skills are standardly included in job descriptions.	New recruits are all digitally capable. All job descriptions include relevant digital skills.



Digital maturity competencies	Level 1	Level 2	Level 3	Level 4	Level 5
<b>07. Learning</b>	Skill-sharing	Building literacy	Centralised	Multi-layered	Cultural
	Digital experts teach others on an ad-hoc basis. The training budget is very small.	There's a small budget for basic digital skills in digital expert roles.	Organisation-wide training is normalising digital skills.	Digital upskilling is a priority for all. Teams understand their role in the digital change.	Learning function leads on the development of digital skills and behaviours at all levels of the organisation.
<b>08. Project management</b>	Inconsistent	Basic	Progressing	Developing	Impactful
	Project management is done differently for different projects.	Some common project management principles are used.	Projects are managed through a structured but often lengthy process.	Agile project management principles and practice are used. There is a launch, test and improve approach.	Agile principles of digital project management are consistently used in all projects to improve efficiency and increase impact.
<b>09. Technology</b>	Primitive	Outdated	Keeping up	Effective	Leading edge
	Systems are limited in scope and aren't integrated. They may be insecure.	Systems aren't keeping up with the needs of the organisation.	Systems are stable and enable basic operations.	Tools and systems are delivering improvements in effectiveness.	Interconnected tools and systems provide a smooth, effective internal and external user experience.
<b>10. Data</b>	Chaotic	Understood	Developing	Literate	Driven
	Data in the organisation is scattered and largely about offline activity.	Data is seen as important for the organisation. Quality and use is improving in some areas.	There's a clear policy for data management. Data is integrated and analysed.	Quality, integrated data is used across much of the organisation.	Live data is used across the organisation to shape decisions and performance.
<b>11. Reporting</b>	Sporadic	Tactical	Aggregated	Integrated	Real-time
	KPIs exist, but progress is measured in an ad-hoc way.	Relevant KPIs are set and reported against, but the lessons aren't always used.	Performance data is collected and joined up, but is hard to access.	Holistic performance data is quickly and easily accessible.	Holistic performance data is always available and is used strategically.
<b>12. Insight</b>	Gathering	Understanding	Analysing	Acting on	Learning from





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Digital maturity competencies	Level 1	Level 2	Level 3	Level 4	Level 5
	Insights are gathered but are used inconsistently.	Insights from more than one source are combined to build understanding.	Knowledge about who people are is combined with behavioural insights.	Insights are used to shape planning and delivery.	All work is grounded in rich, up-to-date insight. Work is improved upon iteratively.
<b>13. Communications</b>	Unspecific	Consultative	Inclusive	Strategic	Transformational
	Digital is used as a device to promote non-digital communications.	Digital advice is sought when judged it's needed.	Digital is involved from the outset in communications planning.	Communications are designed to be digital by default.	Digital is used to create adaptable, integrated communications.
<b>14. Service delivery</b>	Basic	Supplementary	Equal	Insight-driven	Innovative
	Information is shared online. Traditional offline services are signposted from the website.	There is some experimentation with service delivery using digital channels.	Digital services are seen as being as important as traditional offline services.	The provision of online services is based on research and testing.	Online services are iterative and integrated. They are delivering previously untapped reach and impact.
<b>15. Internal systems</b>	Inefficient	Inconsistent	Discretionary	Effective	Efficient
	There is no will or budget to digitise systems or processes.	Some digital tools are available but their use is erratic.	Good digital tools are available, with onboarding and support on request.	There is investment in digital tools that improve the working lives of staff.	A comprehensive suite of connected digital tools, with proactive support for staff is in use.





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## TACKLING CLIMATE CHANGE AT OLD DUCHY PALACE, LOSTWITHIEL



Photo: Purcell Architecture Ltd

### *A Low Carbon future for a 700-year-old building*

Cornwall Buildings Preservation Trust (CBPT) plans to carry out a new project at Old Duchy Palace, the Grade 1 Listed Building in the heart of Lostwithiel. The Trust will carefully adapt the building to reduce its carbon footprint, whilst improving its resilience to storms, run off, and the tidal flooding that periodically affects Quay Street. There will also be a new online virtual tour around the inside the building, describing how it has been used through the centuries. We will work closely with our new tenant – an antiques business – to minimise disruption whilst enabling more people to understand and enjoy the building.



Old Duchy Palace has a long and varied history. Built in 1292, as part of the headquarters of the Duchy of Cornwall, it's now the only complete building remaining from the 2-acre medieval complex that once extended along the quay. Its vaulted undercroft opens onto Fore Street, and the large hall upstairs is accessed from Quay Street. The hall had many different roles, at various times housing the Stannary Parliament, Coinage Hall, and County Assizes. After being sold by the Duchy in 1873, it was converted to a Masonic Lodge. When the Lodge closed in 2008,

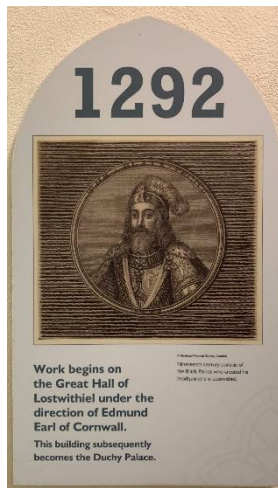
CBPT partnered with The Prince's Regeneration Trust to restore the building for local business use. We took on the care of Old Duchy Palace in 2013 and hold it on a 25-year lease from the freeholder (now called Re-Form Heritage). Although the building had to close in 2020 due to Covid and to remedy an unexpected outbreak of dry rot, it's about to open for business again, operating under an environmentally friendly 'Green Lease'.





*Dickensian Evening in the Main Hall*

*The undercroft information boards, building timeline and room labels will be made available online*



As CBPT has only a small reserve of funds, we are applying to Cornwall's 'Good Growth' Shared Prosperity Fund and the National Lottery Heritage Fund for grants to help carry out the project. Altogether, it's expected to cost around £240,000, of which two thirds would be spent on Old Duchy Palace. Work is planned to begin in Summer 2023 and take place over the following 18 months.

We have produced this summary to tell you about our plans, invite your comments and, we hope, your support.

CBPT has a basic website that sets out who we are and what we do at: <https://cornwallbpt.org/>. Please send any comments or suggestions to us at: [cbptrust@gmail.com](mailto:cbptrust@gmail.com) - and let us know if you would like more information or want to become involved.

CBPT is a small local charity run by volunteers dedicated to rescuing historic buildings that are disused or derelict. We celebrate our 50<sup>th</sup> anniversary in 2023 and want to ensure that we are fit to continue our work into the future by building our capacity. We want to strengthen our Board and shall be inviting more Trustees with community backgrounds and business skills to join us. A new Business Development Officer will be recruited to improve the Trust's links with local and regional partners, enhance our online presence and develop further projects across Cornwall.

The climate change adaptations at Old Duchy Palace are an important next step for the Trust. Proposed work includes replacing the gas fired boiler with an electric heating system, overhauling the non-return flood valve in the undercroft, electrical upgrading, better ventilation, small-scale roof repairs and redecoration. We hope it will be an exemplar of good environmental practice, getting Old Duchy Palace into shape for at least the next 10 years. An experienced conservation architect or surveyor will be appointed to organise the work on our behalf, with a specialist advising on energy efficient heating and ventilation systems. CBPT will favour locally based consultants and contractors, especially those offering training and volunteer opportunities.



The Trust, established in 1973, is a company limited by guarantee (Registration No. 1149012) and registered in England and Wales as a Charity (No. 266880)

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