**Historic Chapels Trust**

**Brief for a Lead Disposals Project Manager**

Historic Chapels Trust is looking to engage a Lead Disposals Project Manager to manage a programme of sympathetic disposals of their magnificent collection of Grade I and Grade II\* listed redundant chapels to organisations better placed to care for them. The successful individual or organisation will have a strong demonstrable track record in the transfer of important heritage assets to new, sympathetic owners. They must be able to assemble and lead an experienced multi-disciplinary team to ensure the project milestones are met by March 2026.

**Background to the Historic Chapels Trust repair and disposals project**

Historic Chapels Trust (HCT) is a registered charity which owns a magnificent collection of the 20 most architecturally and historically significant non-Anglican chapels in England no longer in regular use by their congregations. They are all Grade I or Grade II\* listed representing a variety of denominations, periods and architectural styles and sited in different regions of England from Cornwall to Northumberland. HCT has rescued them from a parlous state by assuming ownership and continues to care for them through undertaking essential repairs and maintenance and working with the local volunteer chapel committees to improve use, engagement and income.

For many years HCT was heavily reliant on a single major funder, Historic England, who generously funded HCT’s work in caring for the chapels. However, in 2016 Historic England announced that it would have to reduce the level of funding for public heritage. As a result, their long-term funding would end in March 2022 and would reduce significantly between 2019 and 2022.

To tackle this challenge, HCT entered into a partnership (from April 2018 to March 2022) with the Churches Conservation Trust (CCT) which involved the CCT being responsible for the day-to-day running of HCT and they share the expertise of their specialist staff who are remunerated by HCT. As well as benefiting from the CCT’s wealth of experience this enabled HCT to streamline its costs and operations by employing no staff directly or maintaining a business premises of its own. Underpinning this strategy was the appointment of a Local Community Officer to improve use, engagement and income at the chapels and the contracting of a Fundraising Consultant to significantly increase unrestricted grants and donations from trusts and foundations and individuals. However, the impact of the Covid-19 seriously impacted these plans and put the chapels at risk. Six are on Historic England’s Heritage at Risk Register and many require urgent repairs to stabilise their condition.

To safeguard the future of these remarkable historic buildings HCT is now embarking on an ambitious but achievable programme of disposals to sympathetic organisations, including other heritage organisations with the goal that by March 2026 the majority will have new owners. Alongside this a programme of major repairs to the chapels at greatest risk will be undertaken to improve their prospects for disposal.

This project has been generously funded by the National Heritage Memorial Fund’s Cultural Assets Fund and Historic England. It is a three-way partnership between HCT, the CCT and Historic England, with the CCT managing the major repair side of the project. It is envisaged that the Disposals Project Manager will lead the disposals side of the project and will, with the Chair of HCT, be responsible for engaging and managing the multi-disciplinary team required to undertake this major programme of disposals within a three year timeframe.

**Management of the Project**

At the highest level, all final decisions regarding disposals will be made by HCT’s Board of Trustees. Feeding directly into this will be the Project Steering Group comprising: Chris Smith; Sarah Robinson (Deputy CEO, the CCT); senior representatives from Historic England; the Conservation Project Manager (who will manage a £2 million plus programme of repairs to make them more attractive to potential new owners) and the Disposals Project Manager. The Terms of Reference for the Steering Group are included as an attachment. The Steering Group is critical to the success of this project. It is the place where key information is shared, working relationships are developed and enhanced, crossovers between the repairs and the disposals element of the project are identified and investigated and agreements brokered (although HCT’s Trustees will have the final say). It is envisioned that the Steering Group will meet quarterly, and roughly two weeks before Trustee meetings, though this may become more frequent if there is a need. The Steering Group is primarily an advisory group where high-level issues are discussed and actions suggested, and then ratified by HCT’s Trustees.

A level below the Steering Group there will be two working groups – one for the disposals side of the project and one for the repairs side of the project. These are where practical issues are discussed and resolved.

The overall project (combining both the disposal and repair elements) will be managed by Chris Smith, Chair of HCT and HCT’s Board of Trustees.

The structure for the repair side of the project will be led by Sarah Robinson with the Conservation Project Manager managing the programme of major repairs. A team of professional contractors will be engaged to carry out the repair works.

**Brief for the Disposals Project Manager**

The Disposals Project Manager will manage the disposals project and will be a key member of the Project Steering Group. They will be engaged as a consultant rather than employed as a member of staff. We envisage that because of the scale of work required within a three year timeframe it is more likely that we will engage a company than an individual.

The contract will run from February 2023 to March 2026 with no break clause.

Their key responsibilities will be:

* To sub-contract and lead a team of suitably qualified and experienced consultants to undertake the disposals project (see section below on engaging the wider project team).
* To identify new prospective owners for the chapels.
* To lead approaches to these prospective new owners, with the support of HCT’s Chair and members of the disposals team as required.
* To manage negotiations with prospective new owners, with the support of HCT’s Chair and members of the disposals team as required.
* To undertake a strategic review of chapels identified for sympathetic commercial sale.
* To manage the transfer of the chapels to new owners, with the support of HCT’s Chair and members of the disposals team as required.
* To create a strategy for any remaining chapels not transferred by the end of the March 2026 (it is estimated that there may be three chapels not transferred).
* To liaise with the Conservation Project Manager to ensure the disposals and the repair strands of the project dovetail.
* To service the Project Steering Group, working with HCT’s Chair to organise the quarterly meetings and to ensure reports, agendas and minutes are compiled and circulated in a timely manner.
* To regularly report to HCT’s Chair, Trustees and the Project Steering Group on progress, providing reports as necessary.
* To undertake due diligence on the new owners of the chapels, ensuring that they have the infrastructure and experience to ensure the historic buildings are sustainable in the longer term.

**Key Milestones to Deliver by March 2026**

**Year 1 (February 2023-March 2024) milestones**

***First six months:***

* Confirmation of sub-contracted members of disposals project team
* Discussions with identified potential recipients for immediate transfer without repairs
* Initial conversations with identified potential recipients for immediate transfer after major repairs completed

***By end of year:***

* Further discussions for transfer of 3 chapels without repairs with identified potential recipients where negotiations are required
* Transfer of 1 chapel without repairs that have confirmed recipients underway.
* Further discussions with potential recipients for transfer of 3 chapels after CAF funded repairs completed

**Year 2 (April 2024-March 2025) milestones**

***First six months:***

* Review of 4 chapels for sympathetic commercial sale

***By end of year:***

* Transfer of 5 chapels without repairs underway following successful conclusion of negotiations with identified recipients
* Agreements entered into with confirmed recipients for transfer of 7 chapels after completion of repairs
* Strategy for 4 chapels identified for sympathetic commercial sale.

**Year 3 (April 2025-March 2026) milestones**

* Transfer of 9 chapels (with or without repairs) underway following successful conclusion of negotiations with identified recipients
* Transfer of 2 chapels for appropriate commercial sale
* Work on approach for the disposal of 3 remaining chapels that have no confirmed disposal route

**End of grant milestones**

* Transfer of 17 chapels.
* Strategy/approach for the disposal of 3 remaining chapels confirmed

**Subcontracting the wider project team**

In order to successfully deliver the disposals project within the timeframe the Disposals Project Manager will need to engage an experienced team of specialist consultants. Consultants with the following expertise are strongly suggested:

* Fundraising Consultant – to work with new owners on fundraising strategies for the chapels
* Historic Environment Advisors
* Project Accountant/Finance Manager.
* Legal Advisor – to advise on the transfer of ownership and the legal processes involved.
* Property Consultant – to consider all possible options for the chapels and manage more complicated disposals.
* Communications & Engagement Advisor to manage communications and PR as well as relationships with local communities and chapel groups;

**Person/organisation specification**

* Experience in transferring the ownership of historic buildings or heritage assets.
* A strong and demonstrable track record of finding solutions for the sustainable long-term care of heritage assets.
* Experience of leading a multi-disciplinary team of specialist consultants in the heritage sector and an understanding of who to engage and why.
* Experience of working on large and complex heritage projects.
* Exceptional project management skills in the heritage sector.
* Demonstrable experience of managing projects to deliver agreed milestones on time and within budget.
* Excellent negotiation and communication skills.
* Strong change management skills.
* Excellent problem-solving skills.
* Budget management skills.
* Ability to juggle a variety of tasks to and meet deadlines.
* Flexible attitude.
* Good reporting skills.

**Budget**

We have £450,000 of funding confirmed for the whole disposals project, but the funder Historic England have indicated their readiness to increase this (up to maximum of £600,000) dependent on a successful programme for disposals established in the early part of this project. This is inclusive of the fees of the Disposals Project Manager and the wider Disposals Team comprised of specialist consultants.

**Submission of tender – please read carefully**

The purpose of the tender response is to enable HCT’s Trustees to evaluate your understanding of our requirements, the suitability of your proposed approach and experience and skills of your team. Your response should consist of a written tender document which will:

* Outline how your or your company’s skills meet the project brief and the person/organisation specification.
* Case studies of three other projects that you have worked on which demonstrate your experience in the areas outlined by in the project brief.
* Your methodology for meeting the milestones.
* How you would engage the wider project team in order to meet the milestones and details of any consultants you would appoint with their experience.
* A breakdown of days and costs for you/your company and the project team will need to deliver this project within budget, and linked to the milestones.
* Confirmation (with copies of the certificates) that you hold Public and Professional Liability Insurance and Companies Employer’s Liability Insurance (if you have employees).

**Please note:**

* Do not include any generic information about your company. Any generic information that has not been requested will not be considered.
* It is the Tenderer’s responsibility to ensure all fees, rates and prices quoted are correct. Tenderers will be required to hold these or withdraw their tender in the event of errors being identified after the submission of tenders.
* If a Tenderer fails to provide fully for the requirements of the specification in the tender it must either absorb the costs of meeting the full requirements of the specification within its tendered price, or withdraw the tender.
* No tender will be considered which is late, for whatever reason nor will changes be permitted after the closing date.
* All tenderers shall keep their tender valid and open for acceptance by HCT or 90 days from receipt.

**Deadline and key dates**

Please submit tenders to hct@thecct.org.uk by 12noon on Monday 16January 2023

Tenders will be reviewed by Friday 20th January 2023.

Interviews (if required) will take place w/c 22nd January and an appointment made towards the end of that week.

**Evaluation of tender**

The tender will be evaluated as follows:

* Experience of managing complex heritage projects (15%)
* Project management skills (15%)
* Communication and negotiation skills (15%)
* Experience of leading a multi-disciplinary team of specialist consultants (10%)
* Experience of transfer of ownership of heritage assets (15%)
* Experience of managing large budgets (10%)
* Resource and expertise to deliver project on time and on budget (10%)
* Problem solving skills (5%)
* Value for money (5%)

HCT will assess Tenderers’ responses according to these criteria and will award points up to the maximum shown against each heading in the Quality evaluation assessment table below. Failure to achieve a rating of satisfactory (i.e. a minimum unweighted score of 3 or above) in any one or more categories may result in the bid being disqualified at HCT’s discretion.

**Quality assessment table**

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| --- | --- |
| **Assessment criteria** | **Score** |
| **Unacceptable**: either no answer is provided, or the answer fails to demonstrate that any of HCT’s key requirements in the area being measured will be delivered. | 0 |
| **Poor:** fails to demonstrate how HCT’s basic requirements in the area being measured will be addressed, giving rise to serious concerns that acceptable outcomes would not be delivered against the project brief.  | 1 |
| **Weak:** barely demonstrates how HCT’s basic requirements in the area being measured will be addressed, giving rise to concerns whether acceptable outcomes would be delivered against the project brief.  | 2 |
| **Satisfactory:** demonstrates how HCT’s basic requirements in the area being measured will be addressed so as to deliver acceptable outcomes against the project brief. | 3 |
| **Good**: demonstrates how most of HCT’s requirements in the area being measured will be addressed so as to deliver good outcomes against the project brief. | 4 |
| **Excellent:** demonstrates clearly how all HCT requirements in the area being measured will be fully addressed so as to deliver excellent outcomes against the project brief.  | 5 |

**Preparation of Tender**

Tenderers are responsible for obtaining all information necessary for the preparation of their response; and all costs, expenses and liabilities incurred in connection with the preparation and submission of the Tender and attending any interviews will be borne by the Tenderer.

* The Tenderer is expected to have carried out all research, investigations and enquiries which can reasonably be carried out and to have satisfied itself as to the nature, extent, and character of the requirements of the Contract (in the context of and as it is described in the Specification), the extent of the materials and equipment which may be required and any other matter which may affect its Form of Tender.
* Tenderers may seek clarification on any of the points contained in the tender documents at any time **prior to seven working days before the date for receipt of tenders.** This will allow time for HCT to prepare a response to all tenderers by five days before the tender deadline and for all tenderers to incorporate the clarification prior to the tender deadline.

**Non-consideration of Form of Tender**

HCT reserve the right not to award the contract to the highest scoring, lowest priced or to any tenderer; and reserve also the right to accept any of the same in whole or in part. HCT may also refrain from considering any Form of Tender if it the Tenderer does not provide all of the information required.

**Tenderer’s Warranties**

In submitting a Tender, the Tenderer warrants that:

* All information provided is true, complete and accurate in all respects including details of previous projects being presented as examples,
* It has full power and authority to enter into the Contract.
* It is of sound financial standing, and
* Its partners, directors and employees are not aware of any circumstances that may adversely affect such financial standing in the future.

**Confidentiality**

All documentation issued by HCT relating to the tender shall be treated by the Tenderer as private and confidential for use only in connection with the tender and any resulting contract and shall not be disclosed in whole or in part to any third party without the written consent of HCT. The documents which constitute the project and all copies thereof are and shall remain the property of HCT and must not be copied or reproduced in whole or in part and must be returned to the HCT upon their request. All information provided by Tenderers as part of a tender return will be treated as confidential. Freedom of Information in relation to this tender may be made available on demand in accordance with the requirements of the Freedom of Information Act 2000. Tenderers should state if any information supplied by them is confidential or commercially sensitive or should not be disclosed in response to a request for information under the Act, and should state why they consider the information to be confidential or commercially sensitive. This will not guarantee that the information will not be disclosed, but will be examined in the list of the exemptions provided in the Act

**Contact**

**We welcome questions or discussions about the brief prior to the submission of tenders. If you would like to get in touch please contact Chris Smith, Chair of Historic Chapels Trust at** **chris.g.smith@outlook.com****. All questions must be sent no later than seven working days before the receipt of tenders.**