



CORNWALL BUILDINGS
PRESERVATION TRUST

INVITATION TO TENDER

'A Low Carbon Future for Duchy Palace'

BRIEF FOR A BUSINESS DEVELOPMENT CONSULTANT

May 2023



Funded by
UK Government



The Trust, established in 1973, is a Charitable Incorporated Organisation, registered in England and Wales as a Charity (No. 266880)
Registered Address: Truro Community Library, Union Place, TRURO, TR1 1EP email:cbptrust@gmail.com Website: www.cornwallbpt.org



CORNWALL BUILDINGS PRESERVATION TRUST

1. Summary

Cornwall Buildings Preservation Trust (CBPT) wishes to appoint an experienced Business Development Consultant to research, develop and produce a detailed Business Plan for the Trust for 2025-2028. The format will follow National Heritage Lottery Fund guidance.

The commission is scheduled to begin in October 2023 and is expected to last for 9 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 focussed on the care and maintenance of Old Duchy Palace (ODP) in Lostwithiel. We hold a long lease on this important medieval building, but its operation has been loss-making and a drain on resources and morale. Immediate issues there are being resolved with grant aid, but we need to ensure the building will be self-sustaining for the future. Currently the rent from our business undertenant is our sole source of regular income.

CBPT needs to be able to move on to new projects to better fulfil its charitable objectives. 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. Identifying new partners, projects and income streams will be essential to move this aspiration forward.

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 are using grants to grow our capacity through this consultancy and a parallel but linked Digital Strategy and Action Plan Consultancy that includes commissioning a new Virtual Tour for Old Duchy Palace. A capital works programme at Old Duchy Palace will be also carried out during 2023-24.

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) and by the National Lottery Heritage Fund's Business Resilience guidance.

The Business Development Consultant will support the Trustees in achieving their vision to become a more outward looking and resilient organisation that will save, sustain and champion vulnerable historic buildings and places in Cornwall for the benefit of local communities. The primary aim for the consultant is to audit our current skills and resources to produce a Business Plan for 2025-28 that underpins our Business Resilience needs.

The overall Business Plan needs to take cognisance of the SWGS recommendations, including our need to:



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- Strengthen governance arrangements through broadening the capability and capacity of the Board, and through active recruitment.
- Produce a succession plan to allow for trustee retirement.
- Significantly increase our stakeholder community connectivity both across the Duchy and beyond.
- Build a “small grant” capability of at least £100k/year plus the additional capacity to deliver more complex applications sufficient to “match” any funds available from core funders.

While our technical conservation and building knowledge is very good, our current assessment of the Trust's skills shows a lack of business leadership, governance and networking skills; we want to improve these essential business and management skills as part of the Plan.

The Trust is entirely volunteer-led and needs additional capacity to identify and prioritise heritage at risk across Cornwall and to develop potential projects with partners, to secure funding and give new life to historic buildings that are at risk. The consultant will review our current network of organisations, social enterprises and heritage trusts in Cornwall working to further the Trust's vision and develop this network.

SWGS advised that priority should be given to engaging with the organisations seen most valuable to the requirements of CBPT including:

- Local Authorities: Cornwall Council
- Potential funders: Historic England, The Architectural Heritage Fund, the National Lottery Heritage Fund (NLHF), Cornwall Community Foundation, GRIN (grant database)
- Heritage organisations: The Heritage Trust Network, Cornwall Museums Partnership, Gorsedh Kernow, Cornish Ancient Sites Protection Network, Cornwall Archaeological Society, Bord Ertach Kernow, Association for Cornish Heritage
- Influential regional groups: The National Trust, Cornwall Wildlife Trust, Royal Institution of Cornwall,
- Potential partners: Cornwall Heritage Trust, The Cornish Buildings Group
- Building Preservation Trusts: Somerset BPT, Devon Historic Buildings Trust
- Cornish Area groups: Tamar Valley, Saltash Heritage, St Piran Trust, Fowey Valley Partnership
- Educational establishments: Falmouth University, Exeter University, Truro College, Cornwall College, Plymouth University
- Business organisations: Cornwall Chamber of Commerce, CloS Local Enterprise Partnership

The consultant will be expected to balance their time between work with existing Board members, recruiting new ones, networking/advocacy and developing a robust 3-year financial plan. They will be expected to work closely with Trust's Forward Planning Group.

4. Key tasks and responsibilities

Work with the Trustees, local authority conservation officers and other potential project partners to:

- Review the "Heritage At Risk" register, Cornish Town Deals, Investment Plans (Truro, St Ives, Penzance and Camborne) and to identify at least one new project with suitable community partners that we can work with, including researching funding for early-stage project viability. Explore funding options, make connections.



- Be an advocate for the work of the Trust in securing sustainable futures for heritage at risk.
- Identify potential new trustees and provide information to the trust for agreement to invite them to join the trust.
- Review the current Audience Development Plan. Working with the trustees, make and maintain contact with existing and potential partner organisations in the voluntary and private sectors, Parish and Town Councils, and Cornwall Council and explore how we can work together to promote and support community heritage.
- Improve understanding amongst statutory and other agencies and funders, as to how Trust members can help them to tackle heritage sites at risk and deliver other community cohesion, economic regeneration and wellbeing objectives.
- Work with the Digital Strategy Consultant to utilise the Trust's digital systems and website and participate in the meetings and joint activities of Cornwall's charity and heritage network. Work with the Digital Strategy Consultant to create a network representation of potential audiences and stakeholders for the Old Duchy Palace.
- Review the Trust's finances in conjunction with the Treasurer and our accountant, including the adequacy of projected income from Old Duchy Palace and the Trust's investment strategy. Investigate possibilities for both future core funding and project specific funding.

5. Project Outputs

At the conclusion of the consultancy the Trust wishes to have a detailed 3-year year strategic Business Plan for 2025-28 in place with future funding streams clearly identified. It will effectively summarise the results of the consultancy. It should be arranged in line with the NLHF template using Trust fonts and headings and will set out:

- who we are
- what we do
- who we do it for – our audience
- where we are going – including new partnerships
- how we expect to achieve our objectives
- what financial and human resources we need to achieve those objectives
- income and expenditure projections

The Business Plan needs to be able to demonstrate that CBPT can arrest the recent loss-making trend and become financially sustainable for the foreseeable future. It will be used as a key tool to support relevant funding applications and discussions with existing and potential partners. Content will include:

- An updated Audience Development Plan building on the work undertaken by SWGS, including providing a representation of the network of charities, Trusts, social enterprises etc. that work with or are potential partners of the Trust.
- A review of the Trustee Skills Audit conducted in November 2022 and the production of a new training programme to improve skills listed, including potential providers, timescales and costs.
- An updated Environmental Action Plan.
- Review of Risk Register
- Succession plan for Trustees



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

The ideal consultant will have experience of working in a cultural, community or membership organisation, involving development work, signposting, and partnership building. They should have a broad-based interest in the historic environment and built environment matters generally and should be knowledgeable about the context they will be working in in Cornwall.

Essential

• Training, experience and qualifications

- Qualification to degree level (or equivalent experience)
- Experience of partnership working for, or with, the public, private and third sectors.
- Track record of successful business planning and grant funding applications.

Knowledge and skills

- Exceptional interpersonal skills with the ability to work with a diverse range of people from professionals and funders to volunteers and community stakeholders
- Excellent organisational skills and the ability to keep detailed records
- Excellent verbal and written communication skills and ability to adapt communication styles to a variety of circumstances.
- Ability to act as a persuasive representative of CBPT.
- Good IT skills including use of financial spreadsheets

Desirable

- Experience of working with community groups.
- Experience of supporting volunteers
- Experience of representing an organisation in the public arena.

- Facilitation skills
- Understanding and appreciation of the following:
 - community engagement with places
 - the benefits of the historic environment for communities
 - the development process and the planning system
 - historic environment policies and practices

Behaviours

- A strong interest in regeneration, heritage and sustainability in the built environment.
- Self-motivated, creative, adaptable and hard working.
- Awareness of current issues and best practice.
- Effective at negotiating and influencing.
- Able to build strong personal relationships.
- Able to listen and understand other people's perspective.
- Committed to bringing diversity to the sector.
- Committed to improving environmental sustainability.

7. To Apply

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



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- Approach: Outline your response to the brief above and how you will approach the different phases of the work.
- 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 been involved with that we can contact for a reference

Indicative timescale:

Publication of invitation to tender:	21 May 2023
Acceptance period for tenders:	22 May to 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 Business Plan:	July 2024

We have an indicative budget of £35,000-45,000 including VAT with the expectation to complete work within 9 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 mentoring/Continued Professional Development/student training or volunteering opportunities 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 email for the attention of Kirsty Worden at CBPTTrust@gmail.com by 30 June 2023.

Interviews will be arranged, remotely if necessary, in July and August 2023.

8. Supporting Information

- CBPT Low Carbon Project Summary (November 2022, below)
- National Lottery Heritage Fund Business Plan guidance: [Business plan template and guidance | The National Lottery Heritage Fund](#)
- Cornwall Buildings Preservation Trust 5-Year Strategic Business Plan & Proposals for Audience Development (South West Growth Service 2022) – on request.



CORNWALL BUILDINGS
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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.



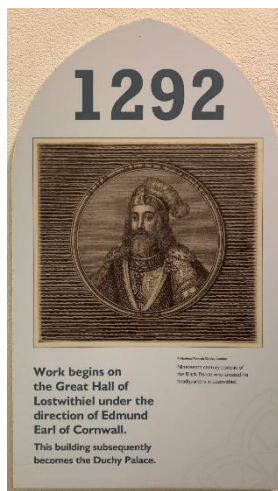
Old Duchy Palace has a long and varied history. Built in 1292, as part of the headquarters of the Duchy of Cornwall, it's now the only complete building remaining from the 2-acre medieval complex that once extended along the quay. Its vaulted undercroft opens onto Fore Street, and the large hall upstairs 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 - 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 50th 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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