



**MIDDLETON HALL**  
— & GARDENS —

## **Specification for Master-planning Consultancy Services**

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## 1. Introduction

Middleton Hall & Gardens is a wonderful set of historic Grade II\* listed buildings spanning seven centuries of English domestic architecture, ranging from 1285 to 1820. The property was saved from dereliction by Middleton Hall Trust and, in the process, a tangible link maintained to notable owners and important events in social history. Set in beautiful gardens and nestled in the North Warwickshire countryside, it is conveniently located close to large urban conurbations and has the potential to become a premier visitor attraction. The consultancy work specified by this brief is to produce a development Master-plan to bring that about. Appointment of the preferred applicant is subject to successful funding applications to the Heritage Lottery Fund and Architectural Heritage Fund.

## 2. Background information

### 2.1 Middleton Hall and Middleton Hall Trust

Middleton Hall has two entries in the Domesday book. The oldest building that survives today dates from 1285. Elizabeth I stayed at the Hall for a week in 1575 and it was home to Francis Willughby, Fellow of the Royal Society (FRS) and John Ray (FRS), referred to as the father of natural history (see Appendix 1). It is set in 42 acres of tranquil grounds, with nature trails around Middleton Lake. Much of the land is a Site of Special Scientific Interest (SSSI). The grounds include an orchard and two walled gardens (see Appendix 3).

Middleton Hall Trust Ltd was founded in 1980 with the mission 'to restore and maintain Middleton Hall, Warwickshire, and its grounds for the benefit of the public as a building of special and historic interest and as a centre for study and public education in the conservation of land and its natural resources, in line with its charitable aims.' This mission remains the central aim and focus of all the Trust's activities.

Since its formation an astonishing amount has been achieved by the Middleton Hall Trust supported by an army of approximately 500 volunteers. Some of the site improvements have been achieved with the assistance of external funding but the majority of the restoration achieved to date has been brought about by income generated from opening the site to day visitors and hiring of the Hall for private functions, weddings in particular. Currently the Trust has three full-time members of staff and two part-time posts, House Keeper and Accounts Administrator, with around 60 volunteers providing support, in aspects such as grounds and building maintenance, event hospitality and museum development.

The Hall and grounds are open to the public as a Museum and Gardens. To fund its work, the Trust hosts public events, private history and garden tours, weddings, private parties and business conferences and meetings. The Hall houses The Peel Collection & Police Museum (see Appendix 2) and boasts a Courtyard with a coffee shop and 11 further small retail start-up businesses. The Royal Society for the Protection of Birds (RSPB) rents office and workshop space.

Middleton Hall Trading Ltd is a wholly owned subsidiary of Middleton Hall Trust Ltd and is the company through which all wedding business is managed. All profits from the trading company are transferred to the Trust to support repair and conservation work.

Parts of the property are yet to be restored and under the terms of its lease the Trust is committed to completing full restoration; more substantial injections of external funding are required to bring that about. The most significant building in need of restoration is a Tudor Barn, which has potential to become a new entrance portal to Middleton Hall, accommodating visitor welcome, interpretation space, educational and training facilities.

Currently approximately 13,000 people visit the Hall & Gardens per annum and it is envisaged that the Hall and its surrounds could attract over 70,000 visitors per annum with appropriate funding support for the remaining building restoration work, resources to expand the body of volunteers, the introduction of engaging interpretation displays and expanding the annual programme of events and activities. The Master-plan will consider each of these elements along with a review of governance arrangements, to create an interpretation plan, business plan, and implementation programme.

## **2.2 The Vision for Middleton Hall & Gardens**

The Trust's overall vision is that by 2023 a series of co-ordinated developments will allow our immersive stories to be told in such a way that visitors will have a worthwhile visitor experience which will leave them wanting to return and encourage friends and family to visit. The aim is to create a premier attraction in Warwickshire, elevating Middleton Hall to a site of significant regional and national importance, attracting a larger number of visitors who will pay a higher price. To comply with our lease, we are also required to complete the restoration of the remaining two buildings, the Tudor Barn and The Coach House. We would like to complete these restorations in a way which will enable us to bring these buildings back into use in the best way to support our overall vision.

### **A Place of Creativity**

Aim – To immerse the visitor in the stories of the creative residents and volunteers that have lived and worked on our site over the last 900 years. From the more typically creative pursuits of music, garden design and literature to the more domestic skills of spinning, cloth dying, blacksmithing and woodcarving. To encourage our visitors to learn about all levels and skill sets that people have had in the past and how these are still in use today, and how they can get involved with having a go themselves.

### **A Place of Discovery**

Aim – To tell the stories of our famous natural scientists Francis Willughby and John Ray, our Tudor Explorer Hugh Willughby and the uniqueness of our architecture and what that can reveal people's lives from the past. To engage people with the concept that discovery is often the result of trial and error, of perseverance in the face of challenges and how this remains true today.

## **2.3 The need for a Master-plan**

The aim of the Master-plan is to create a development route-map to deliver the above 'vision' via a joined-up use of the entire site, that will provide the context for projects to repair and create a new use for those parts of the site not yet restored.

The Master-plan should ensure that the visitor offer at Middleton Hall is the key element in the wider context of the site development, such that visitors understand the identity and 'brand' of the site even though parts of the Hall and wider estate may be used for purposes beyond the visitor experience. The Master-plan will underpin future fundraising and will define the organisational structure required to most effectively deliver the vision. To achieve this, the Master-plan will therefore:

- *Understand the scale of the existing heritage visitor attraction and commercial activity and the scale that the site can realistically offer*
- *Understand the need and identify ways in which the site can generate operational surpluses to support core activities, including maintenance costs, and thereby ensure its long-term sustainability*
- *Explore imaginative options for a joined-up use of the overall site to create a compelling visitor attraction working alongside rental units and other commercial uses, whilst respecting the heritage value of the listed buildings and protection of the SSSI*
- *With an understanding of the existing interpretation plan and events programme, create an expanded future strategy of interpretation, events and activities, to engage visitors with the joint themes of the 'vision' for Middleton Hall*
- *Forecast the operational income and expenditure of the expanded visitor attraction and commercial activities, aiming to demonstrate a sustainable business model without an adverse impact upon the listed buildings and SSSI*
- *Take account of the views of stakeholders, including tenants and neighbours, and carry out a traffic impact assessment to understand the logistical challenges of increasing use of the site including access, car and coach parking and traffic management*
- *With additional input from the separately appointed architectural design team:*
  - *identify discrete projects and phasing of restoration, other repair works and installation of interpretation, with costings and proposed timetable for each phase*
  - *estimate costs associated with the maintenance of the buildings and grounds and the running costs for the visitor attraction and commercial activities*
- *Identify a realistic fundraising strategy including target funding sources for each project or phase of the works*
- *Identify the governance arrangements to deliver effectively the Master-plan and the ongoing operation of the site*

The Master-plan will be developed by a small steering group comprising representatives of the Trust, a Project Organiser (to be appointed), the Master-plan consultants (as per this brief), and the architectural design team (to be appointed). The steering group will make study visits to relevant comparator sites to learn from their management teams and will carry out extensive consultation with stakeholders.

The completed Master-plan will provide a valuable tool in demonstrating that the Trust is clear in its future strategy and phased development approach it wishes to take. The Master-plan will encourage investment, involvement, participation and 'buy in' and will provide the focus for the restoration action plan going forward.

### 3. Scope of the Master-planning Consultancy Services role

In consultation with and reporting to the Heritage Site Manager and Trustees of Middleton Hall Trust, the Master-plan Consultant will ensure the master-planning process is progressed to a satisfactory conclusion in accordance with section 2.3 above and by covering the following activities in particular.

1. Research existing reports, historical papers and studies that provide the background to plans currently and previously considered on the site including the Middleton Hall interpretation plan and design proposals for the Tudor Barn.
2. Identify stakeholders and carry out stakeholder interviews.
3. Carry out research and consultations to identify existing and potential audiences and comparator sites.
4. Organise study visits to a minimum of 5 comparator sites for the steering group and relevant Trustees to visit as part of the master-planning exercise.
5. Use site and buildings surveys (obtained under Architectural Design Services) to develop display space, signage and visitor flow routes.
6. Trial and evaluate new activities, including school activities and public events, to create an expanded strategy and programme of events and activities, to grow in accordance with each phase of the Master-plan.
7. Carry out a Traffic Impact Assessment of the events strategy and projected increase in visitor numbers.
8. From conclusions of the above elements and with input from the architectural design team, take the lead in producing a Middleton Hall Master-plan using workshops and feedback cycles:
  - identify options for a joined-up use of the site;
  - expand the Middleton Hall interpretation plan, taking account of new uses for the Tudor Barn and joined-up use of the wider site;
  - prepare outline costings to deliver the Master-plan;
  - prepare indicative ongoing operational budgets, including maintenance costs.
9. Present a first draft of the Master-plan to the Middleton Hall Board of Directors for consideration, explaining the physical, social and economic impacts of the proposals and their fit with the Trust's charitable objects and 'vision' for Middleton Hall.
10. Identify governance and management best suited to develop and operate the Master-Plan, prepare organograms, carry out a Governance Review and agree with the Board of Directors an appropriate governance development plan.
11. Work with the Heritage Site Manager and volunteers to carry out visitor surveys and public consultation events on the draft Master-plan, including the proposals for interpretation, events and activities, collate feedback and prepare a second draft of the Master-plan for Board approval.
12. Write consultancy briefs and job descriptions for specialist roles required to deliver the Master-Plan, including the proposals for interpretation, events and activities.
13. Identify prospective funding sources and a programme for delivery of Master-plan phases.
14. Present the final Master-plan, including fundraising strategy, to the Board of Directors.
15. Participate in a public launch event of the published Master-plan.

## 4. Consultancy deliverables, budget and payment schedule

The Master-plan Consultants are required to deliver:

- A minimum of 5 study visits to comparator sites by the steering group and relevant Trustees and a report of learning points from each visit.
- A Master-plan report, approved by the Board of Directors of Middleton Hall Trust in a format suitable for the Trust to distribute electronically and in hardcopy, with 6 bound hardcopies to be provided, to include:
  - a phased programme of capital works to complete the restoration of the site, along with other repairs and an ongoing maintenance programme;
  - an interpretation plan, strategy and phased expansion of the programme for events and activities;
  - a traffic impact assessment and management plan;
  - a fundraising strategy.
- An Executive Summary of the Master-plan in digital format only, suitable for the Trust to print hardcopies as required, in a style suitable to attract and inspire the interest and support of all stakeholders in Middleton Hall, existing and prospective, particularly potential funders.
- The operational income and expenditure and cashflow model as a fully accessible spreadsheet that the Trust can use to produce business plan forecasts and to monitor actual performance compared with forecast.
- Consultancy briefs and job descriptions for specialist roles required to deliver the Master-Plan.
- A governance review and development plan aligned with the Master-plan, approved by the Board of Directors of Middleton Hall Trust.

The maximum budget to deliver the requirements of the Master-plan Consultancy Services defined by this brief is £50,000 before any applicable VAT, to include all fees, travel expenses, materials, printing and distribution costs.

A schedule of payments based on the achievement of relevant milestones as the work progresses will be agreed with the successful applicant. The final payment will be made following approval of the Master-plan document by Middleton Hall Trust and funders.

## 5. Information required to tender

Please include with your tender proposal the following supporting information.

- (a) The professional accreditation and skills of the people to be involved, including names and CVs, their specific responsibilities and arrangements for sub-contracting any parts of the work.
- (b) Details of comparable projects undertaken by your firm involving heritage visitor destinations, with dates and contact details to obtain references.
- (c) Project approach: a description of how you will approach and deliver the master-planning work, including a breakdown of phases of work, with milestones.
- (d) Project management: a description how you will manage the work, including a resource plan showing the breakdown of hours allocated between individuals and each phase of work, and proposed arrangements for regular communication with the steering group.

- (e) Your fixed fee to cover all elements of the scope of work detailed by this tender specification and whether it includes travel and other expenses; if it does not, include a description of any likely expenses to be incurred and an estimated cost.
- (f) Daily fee rates for additional work should any need arise that is beyond the scope of work detailed in this tender specification.
- (g) Confirmation of professional indemnity insurance and the level of cover.

## 6. Tender validity period

Tenders are to remain open for acceptance for a period of 180 days beyond the submission date, to allow time for necessary funding to be secured.

Once the preferred tender is accepted, all fixed fees and fee rates stated in the tender shall remain firm for the whole life of producing the Master-plan report.

## 7. Submission of tenders

The Tender Form and all accompanying documentation must be submitted in digital and hardcopy.

FOUR hardcopies should be sent in a plain envelope to arrive no later than 2.00pm Friday 19<sup>th</sup> October 2018, to the following address:

Middleton Hall Trust  
Middleton  
Tamworth  
Staffordshire  
B78 2AE

The electronic copy of the tender proposal should be sent to the following email addresses:

[joanna.habart@middleton-hall.co.uk](mailto:joanna.habart@middleton-hall.co.uk)

[dudleyr789@gmail.com](mailto:dudleyr789@gmail.com)

Applications received after the due date and time will not be considered.

Middleton Hall Trust does not bind itself to accept the lowest or any tender, and no person making a submission will be remunerated for any trouble or expense incurred in its preparation.

## 8. Evaluation of tenders

Tenders will be assessed against items (a) to (f) in the ‘Information required to tender’ section above; failure to submit any of the required information may result in your tender being rejected.

Tender submissions shall be judged on both quality and price based on the following criteria: the maximum quality score will be 60%; the maximum price score will be 40%.

Criterion and sub-criteria	Weighting	
	Elements	Total
1. Quality: <ul style="list-style-type: none"> <li>• relevant qualifications and skills of the consultants</li> <li>• comparable project experience</li> <li>• project approach</li> <li>• project management</li> <li>• attention to detail and overall quality of tender proposal</li> </ul>	10% 15% 15% 10% 10%	60%
2. Price: <ul style="list-style-type: none"> <li>• fixed fee to cover the scope of work detailed in this brief</li> <li>• daily rates for additional work should any need arise that is beyond the scope of work detailed in this brief</li> </ul>	30% 10%	40%

Each quality sub-criterion will be scored based on the following indicative scores then multiplied by the weighting for that element.

Scoring methodology for quality criteria	Indicative score
All elements below acceptable parameters	0 to 2
Some elements within and some below acceptable parameters	3 to 4
All elements within and none above acceptable parameters	5
All elements within and some above acceptable parameters	6 to 7
All elements above acceptable parameters	8 to 10

The price score will be calculated as:

- fixed fee: lowest fixed fee tendered divided by applicant tender fixed fee multiplied by the weighting for that element;
- daily rates: lowest daily rate tendered divided by applicant tender daily rate multiplied by the weighting for that element; for this score an average daily rate will be calculated by dividing the fixed fee by the total number of hours shown in the resource plan.



## 9. Timing

The proposed timetable is set out below; this is intended as a guide and whilst Middleton Hall Trust does not intend to depart from the timetable it reserves the right to do so at any stage.

<b>Target date</b>	<b>Activity</b>
2.00pm Friday 19 <sup>th</sup> October 2018	Tender Proposal Return Date
Friday 2 <sup>nd</sup> November 2018	Interviews of short-listed applicants
Friday 9 <sup>th</sup> November 2018	Evaluation of tenders completed and applicants notified (confirmation of decision subject to a 'standstill period')
Thursday 31 <sup>st</sup> January 2019	Contract awarded, subject to successful grant awards
Friday 1 <sup>st</sup> February 2019	Start-up meeting (provisional date)
Monday 30 <sup>th</sup> September 2019	Master-planning work completed

## 10. Copyright and confidentiality

Copyright of all documents produced under this commission is to be assigned to Middleton Hall Trust. The consultant is to clear copyright approval for any illustrations or other material used.

## 11. Contact details for further information

For further information about the tendering process please contact: Joanna Habart, Heritage Site Manager [joanna.habart@middleton-hall.co.uk](mailto:joanna.habart@middleton-hall.co.uk) 01827 283095

**[www.middleton-hall.co.uk](http://www.middleton-hall.co.uk)**

## 12. Appendices

### Appendix 1 – Middleton Hall historic timeline and Hall residents

There has been a residence on this site for almost 1,000 years. Over the years the Hall has changed, buildings have been added and demolished, the Estate which was once many thousands of acres has shrunk and it has had a wide variety of owners and tenants, and a few famous names have visited too.

The first residents of the manor of Middleton of whom we have documentation are Saxons by the names of Pallin and Thurgot, who are mentioned in the Domesday Book. Middleton then passed to Hugh de Grandmesnil, a Norman lord and Cavalry Commander, who was a companion of William the Conqueror and also fought at the Battle of Hastings in 1066. For his service at the battle Hugh was given 100 manors of which the majority were in Leicestershire and made him the largest landholder in that county.

The Middleton estate then passed to the de Marmion family in 1091. The de Marmions were the Standard Bearers of England, jousted in the King's colours, and had the role of King's Champion at the coronation of new monarchs. During their ownership of Middleton the estate was leased to the Knights Templar in 1185. The last of the de Marmion lords was Philip and following his death in 1291 Middleton was left to his widow as a dower house. Following her death in 1313 Middleton was given in equal shares to Philip's three surviving co-heirs. In 1362 the three thirds were united under one owner again.

Middleton then passed to the Willoughby family through marriage and remained in the ownership of that family for about 500 years. Sir Hugh Willoughby spent his childhood at Middleton Hall. He was an explorer who unfortunately died when his ship got lost trying to find a North-East passage to China. Sir Francis Willoughby built Wollaton Hall in Nottinghamshire and also created the ironworks and Middleton Pool at Middleton Hall. He was knighted by Queen Elizabeth I in the Great Hall at Middleton Hall in 1575. During the Tudor period the Jettied Building, Great Hall and Tudor Stable Range were built and the moat was lined with bricks.

Two of Middleton Hall's most famous residents were the great naturalists Francis Willughby (1635-1672) (who spelt his name this way) and his tutor, friend and collaborator John Ray (1627-1705). Francis was born and lived at Middleton Hall and raised his family here. Francis' work on birds 'Ornithologia' and on fish 'Historia Piscium' were published after his death by John Ray. John Ray tutored Francis' children whilst he stayed at Middleton Hall and remained at the Hall for a number of years after Francis' death. It was at Middleton that he developed his original works on Natural History including his 'History of Plants'.

Francis' son Thomas became the 1st Baron Middleton in 1712, an honour which was bestowed on the family because of his father's achievements. This was a period of extensive construction at the Hall in which the West Wing and the heated Walled Gardens were built and modifications were made to many of the existing buildings in order to create a Georgian home fit for the new Lord.

Middleton Hall was sold in 1925 to John Averill, a farm landlord and industrialist. His family were the last residents of Middleton Hall. The site was sold to Amey Roadstone for the extraction of gravel in 1966.

## **Appendix 2 - The Peel Collection & Police Museum**

Middleton Hall is home to The Peel Collection and Police Museum, run by the Peel Society which was founded in 1979 to celebrate the 150th anniversary of the establishment of the Metropolitan Police Force.

The Peel Society is a national, non-political, historical society which is a registered charity. The Society promotes the study of the life, works and times of Sir Robert Peel and the Peel Family.

Sir Robert Peel is credited with writing the first ever political manifesto, known as the 'Tamworth Manifesto'. His important local links mean Middleton Hall is an apt place to hold the collection.

John Peel, Robert Peel's cousin, was a tenant of the Hall between 1854 and 1872 and was responsible for filling in parts of the moat and removing the deer from the park. He was, like his cousin, an MP and is buried in Middleton Parish Church.

### Appendix 3 - Middleton Hall site map

