

# G R E G Y N O G



## BRIEF

### Business Plan Consultant

**Region: Wales**

**Job Type: Contract**

**Fee: £10,000 inclusive of all disbursements but excluding VAT**

**Location: Gregynog, Powys, Wales, SY16 3PL**

**Timescale: April 2026 – March 2027**

Gregynog Trust wishes to appoint a Business Plan Consultant to develop a business plan to support The National Lottery Heritage Fund project, *Raise the Roof!*

**Deadline for applications: 1200 noon, 2 April 2026**

**Proposed interview date (online): Week begin 13 April 2026**

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## **1.0 Background**

### About the Gregynog Trust

The Gregynog Trust was incorporated on 15th November 2016 as Private Limited Company Number 10479711 and granted Charitable Status by the Charity Commission on 30th November 2018 - registered Charity Number 1180943.

Gwasg Gregynog Fine Press although housed at Gregynog, is currently a separate Limited Company. The Gregynog Trust is in negotiation to take full ownership of it in 2026. The Gregynog Music Festival is a separate limited company and not part of the Trust.

### About Gregynog

Gregynog is a 750acre estate which includes the Grade II\* listed Hall, early concrete structures and William Emes and later Dame Sylvia Crowe landscaped gardens, along with a large Site of Special Scientific Interest (SSSI), designated nature reserve and arboretum, Gwgia reservoir, a lake, farmland and buildings. Gregynog's ancient sessile oak woodlands form part of the National Forest of Wales.

Gregynog's history reaches back centuries and is perhaps best known for its 20th Century occupants, sisters Gwendoline and Margaret Davies. These two remarkable philanthropists, social entrepreneurs and renowned art collectors played a vital role in Welsh cultural, educational and social history and made Gregynog their home.

Gregynog Trust is committed to the care, refurbishment and enhancement of this important historic house and working estate. We have so far raised c£800K to contribute to our nature conservation, refurbishment of our Walled Garden and access to our historic gardens. The Trust has begun work on the Heritage Fund supported development phase of its £5m Raise the Roof Campaign – which will see a major step forward in transforming the Hall and the special fine and applied art collections within.

We welcome visitors, to host and originate stimulating conferences and debate, develop new activities and to enjoy a restorative environment. We value our history and in the spirit of the vision extolled by its former owners, Gregynog will continue to play an important role at the heart of Wales and the wider economic, social and cultural life of Wales for future generations. Our care and refurbishment of Gregynog will see us share its magic and create Wales' most welcoming home for nature, learning and the arts.

## **2.0 Raise the Roof! Project**

Raise the Roof is a ~£5 million capital project. The capital works programme focusses on the urgent and critical repair of the Gregynog Hall roof which is nearing the end of its useful life. Associated works will repair or replace rainwater goods, fascias and bargeboards, and undertake essential groundworks to improve drainage. The project also gives the opportunity to make adaptations for climate change and improve accessibility infrastructure. Repairing the roof is the first step in Restoring the Hall, securing this magical place for future generations and unlocking its wider potential.

Alongside the capital works, the project invites people to engage with the remarkable story of the Davies Sisters at their former home, through their collections, as well as within its outstanding natural surroundings. The wider project will undertake organisational development work to support the Trust's long-term sustainability; establish a reinvigorated music and festival programme and a series of vibrant arts and nature focussed events; build and strengthen partnerships with aligned organisations and the local community; develop an interpretation strategy for the estate; and develop and deliver a volunteering programme to support the sustainability of the Trust.

Funding has been secured from The National Lottery Heritage Fund, Architectural Heritage Fund, Pilgrim Trust and Historic Houses Association to support the project's £961,591 Development Phase and we are now building our project team.

**Architect and Design Team Lead** Buttres <https://buttres.net/>

**Project Management** Lode Heritage <https://www.lodeheritage.com/>

We are currently advertising for an Activity Plan Consultant, Business Planner, Evaluation Consultant, Fundraising Consultant and Interpretation Consultant.

**The Trust welcomes proposals from consultants wishing to deliver more than one of the advertised briefs; however, separate applications must be submitted in response to each tender, and applicants should clearly state which other briefs they are also applying for.**

### **3.0 Scope of services**

Reporting to the Gregynog Trust Project Steering Group through the Project Manager, the Business Plan Consultant will work closely with the project team, Gregynog Trust's staff and volunteers to:

- Review the existing business plans and forward plans of Gregynog Trust
- Speak with key staff, trustees and stakeholders of the partner organisations to understand existing operational contexts
- Liaise regularly with consultants in the wider project team to integrate the decision making, aims, outputs, outcomes and their associated costs from the wider project documentation (Interpretation Plan, Activity Plan, Comms Plan, Fundraising Plan) as this information becomes available
- Iterate a business plan for the *Raise the Roof* project in line with guidance from The National Lottery Heritage Fund: [Business plan good practice guidance | The National Lottery Heritage Fund](#)
- Produce the required 5-year I&E projections in line with guidance from The National Lottery Heritage Fund: [Business plan good practice guidance | The National Lottery Heritage Fund](#)
- Work collaboratively to encourage ownership of the document by decision makers
- Ensure the resulting plan reflects the Trust's ambitions, capacity, and sustainability.
- Identify any outstanding risks to the sustainability of the *Raise the Roof* project and make costed recommendations for addressing these in the Delivery Phase (through an appended action plan or similar)
- Contribute to The National Lottery Heritage Fund Development Phase review and progress meetings as requested

### **4.0 Other conditions of appointment**

4.1 The consultant is expected to attend monthly project meetings (hybrid online/ onsite)

4.2 In accepting this commission, the consultant agrees to licence the copyright on all materials produced in support of the project to Gregynog Trust and its project partners. Gregynog Trust shall be entitled to use said materials as they see fit and without limitation.

4.3 All work produced must support both the Charity and the funder's requirements. All work should be shared with partners as directed by the Charity.

4.4 The Consultant is expected to comply with The National Lottery Heritage Fund's [Acknowledgement Guidance](#)

4.5 This is a freelance contract; consultants remain responsible for their own tax and national insurance liabilities.

4.6 Payment will be in instalments, a payment schedule will be agreed on appointment

## **5.0 Experience, knowledge and skills**

We are looking for a Business Plan Consultant who:

- Has experience of writing Business Plans to support Delivery Phase applications to The National Lottery Heritage Fund
- Has experience of business planning in comparable organisational settings
- Is entrepreneurial and ambitious for the organisations they support
- Has a collaborative and client led approach
- Has excellent interpersonal skills and can work with people from a wide range of backgrounds
- Has experience of working in a Welsh context

## **6.0 Timetable**

|  |                          |
|--|--------------------------|
| Return of tenders:                       | 1200 noon 2 April 2026   |
| Interviews (online):                     | Week begin 13 April 2026 |
| Commencement of contract:                | April 2026               |
| Development phase review (anticipated)   | December 2026            |
| Delivery Phase application (anticipated) | February 2027            |
| Completion of contract:                  | March 2027               |

Project timetables are indicative and are subject to change during the project's Development

Phase.

## **7.0 Application Process**

7.1 For all enquiries and to respond to tender please contact:

Dale Copley, Project Manager

hello@lodeheritage.com

07841870445

The following information is required as part of the submission:

- Full supplier details including details of the public liability, employers' liability and professional indemnity insurance.
- A brief methodology (no more than 2 sides of A4 in total) describing the Consultant's approach to the commission.
- A fee proposal for the work, including a cost breakdown of fees and allocation of time for each team member and expected days of work. The fee should include expenses and make clear if VAT is payable.
- Schedule of day rate(s) that would apply if additional work were to be instructed beyond the scope of this brief
- Cvs of key staff members to work on the project.
- Examples of 3 comparable projects undertaken in the last five years
- Two references

7.2 Gregynog Trust reserves the right to undertake interviews and/or clarification meetings with some or all the tendering consultants, should it be considered necessary. The assessment may be moderated based on clarification meetings, should they be required.

7.3 Clarification queries may also be raised on the above basis.

## 8.0 Assessment Criteria

8.1 Submissions received will be assessed on a quality/price basis as described below:

**Quality (70% weighted): Price (30% weighted)**

### Quality criteria

|  |     |
|--|-----|
| Proposed methodology meets scope of services and shows awareness of operational context and the Trust's need. Methodology and approach to commission (max 2 sides)   | 30% |
| The consultant has experience of developing and delivering Business Plans for Heritage Fund projects of comparable scope and scale. Examples of comparable projects undertaken in the last 5 years & references. | 15% |
| The proposed team members have experience of Business Planning for projects funded by The National Lottery Heritage Fund and working with comparable clients. Cvs.   | 15% |
| Value for money. Fee proposal.   | 10% |

|                        |   |   |
|------------------------|---|---|
| INADEQUATE             | Completely fails to meet required standards or does not provide a proposal.   | 0 |
| POOR                   | Proposal significantly fails to meet the required standards, contains significant shortcomings and/or is inconsistent with other proposals. | 1 |
| LESS THAN SATISFACTORY | Proposal falls short of achieving required standards in a number of identifiable respects and leads the evaluator to make assumptions.      | 2 |
| SATISFACTORY           | Proposal meets the required standards.  | 3 |
| GOOD                   | Proposal meets the required standards in all material respects and demonstrates a good understanding of the requirements.                   | 4 |
| EXCELLENT              | Proposal meets the required standard in all material respects and exceeds some or all the major requirements.                               | 5 |

### Cost

|   |     |
|---|-----|
| The lowest cost will receive 30%. The cost of each submission will then receive a proportion of the 30% on a pro rata basis. Therefore, if the lowest cost is £8,000 and another cost received is £12,000, the £8,000 quotation will receive 30% and the £12,000 quotation, being 1.5x the lowest, will receive 20% ( $12,000 / 8000 = 1.5$ , $30 / 1.5 = 20$ ) | 30% |
|---|-----|

8.2 Gregynog Trust reserves the right not to accept the lowest priced or any other tender received.

**ENDS**