



## **Estate Management and Lifecycle Plan - brief for consultant support**

Sheffield Museums is seeking a multi-disciplinary team of consultants with estate management expertise and specialist experience in historic buildings to develop a strategic Estate Management and Lifecycle Plan for our complex and multi-site estate. The buildings in this estate are leased from Sheffield City Council and include Grade I and II listed buildings and two Scheduled Monuments as well as more modern buildings.

### **Who we are**

Sheffield Museums is the independent charity that operates six of the city's leading museums and heritage sites: Abbeydale Industrial Hamlet, Graves Gallery, Kelham Island Museum, Millennium Gallery, Shepherd Wheel Workshop and Weston Park Museum as well as an off-site collection store.

Established in 2021 through the merger of Museums Sheffield and Sheffield Industrial Museums Trust, the charity cares for the city's collections of art, human history and natural science, alongside the Guild of St George's John Ruskin collection and is home to the Ken Hawley Collection Trust's Hawley Tool Collection.

### **What we do**

Sheffield's museums are free and here for everyone. We manage a range of extraordinary museums and heritage sites and deliver a vibrant creative programme that connects people from all walks of life with their history, the world around them and each other.

We work collaboratively with communities, organisations and artists to tell remarkable stories of Sheffield and its people, and to celebrate its reputation for excellence in craft, making and innovation. Together with local, regional and national partners, we showcase home-grown creative talent and bring outstanding cultural experiences to the city.

We welcome around 800,000 visitors annually across our sites and deliver the largest cultural programme for schools in the city.

## **Why do we need support?**

We have recently secured funding from The National Lottery Heritage Fund to support *Defining a Decade*, a project that will shape a 10-year organisational strategic masterplan. This dynamic masterplan, accompanying robust delivery plans and a five-year business plan will embed the organisation's purpose of enriching life in Sheffield, fulfil its mission to connect people with the city's collections, and support its vision of creating welcoming and inspiring museums for everyone.

The Estate Management and Lifecycle Plan will provide a comprehensive framework to guide the investment, development, and long-term utilisation of our estate across all sites. This programme of work will be instrumental in supporting organisational decision-making by offering a clear, evidence-based view of the condition, performance, and future requirements of our buildings and infrastructure. It will also play a pivotal role in shaping our long-term priorities, that will be articulated through the 10-year masterplan.

By setting out costed, prioritised interventions, the plan will ensure that resources are directed where they will have the greatest operational, financial, and strategic impact. In doing so, it will strengthen and inform future funding submissions, reinforce the robustness of our business cases, and help secure the investment necessary to sustain our operations into the future. Ultimately, the Estate Management and Lifecycle Plan will act as a critical enabler, ensuring our estate is safe, resilient, and aligned to our organisation's vision, service needs, and long-term ambitions.

## **What we need**

To ensure the plan is robust, deliverable, and aligned with best practice, we require experienced consultant/s with at least 5 years' experience and expertise working with historic buildings.

Working closely with the Director of Finance and Resources and the Head of Operations, the first phase of work will involve familiarisation with the buildings and existing documentation, including Conservation Management Plans. It will also include assessing the condition of the buildings, reviewing significant mechanical and electrical plant, and evaluating the current building management arrangements.

Building on this understanding, the consultant/s will develop sketch impressions and accompanying narratives to illustrate new opportunities. They will identify and present potential investment options, highlight key considerations, and explore these through co-design sessions with key members from the Sheffield Museums team.

Advising Directors and Trustees on the high-level potential and indicative costs of proposed works to support informed decision-making, including recommendations on the phasing of development projects to maximise value and site potential while minimising

risk. Lifecycle cost estimates should be appropriate for long-term planning and include allowances for professional fees, contingencies, and inflation where relevant.

The primary final output will be a strategic report that sets out a clear and coherent roadmap for the sustainable development of our estate, supported by phased and prioritised recommendations.

### **Scope Summary (What is included)**

The appointed consultant/s will deliver a strategic Estate Management and Lifecycle Plan covering seven Sheffield Museums sites, namely:

- Abbeydale Industrial Hamlet
- Graves Gallery
- Kelham Island Museum
- Millennium Gallery
- Shepherd Wheel Workshop
- Weston Park Museum
- Off-site Collections Store (limited to condition only)

### **The work will include**

#### **1. Estate Analysis**

A comprehensive estate-wide review of all museums and the Collections Store, providing a clear assessment of building condition, mechanical and electrical plant and infrastructure, along with an overview of constraints, risks, and opportunities across the portfolio. Opportunities may include extending the life of existing plant or assets where feasible, rather than pursuing full replacement.

Condition assessments should comprise high-level visual surveys using a standard A–D grading scale, accompanied by a risk score (Likelihood × Consequence). No intrusive surveys are required unless expressly agreed in advance.

### **Condition Assessment Requirements**

Condition assessments must include:

- High-level, visual-only surveys of buildings, plant, and infrastructure.
- Use of the CIBSE (Chartered Institution of Building Services Engineers) guideline framework, applying a standard A–D grading scale.
- A risk rating for each identified issue, based on Likelihood × Consequence.
- A high-level review of environmental and energy performance at both site and building level, including:
  - Identification of carbon-reduction opportunities
  - Assessment of climate-resilience measures, including flood risk (e.g., for Kelham Island Museum, Abbeydale Industrial Hamlet and Shepherd Wheel Workshop)

- Identification of quick-win sustainability improvements
- Consideration of longer-term adaptation requirements
- Identification of opportunities for enhanced circularity and future-proofing.

## **Minimum Analysis Requirements**

**Assessments should reference and integrate:**

- Existing surveys, leases, conservation management plans and statutory documents
- Fitness for current purpose.
- Regulatory requirements: planning, listed building consent, scheduled monument constraints, building regulations.

## **2. Development of Investment Opportunities and Concept Options**

**For each site the consultant/s will:**

- Identify opportunities to develop, enhance or reconfigure the estate
- Provide a clear site sketch per location (no detailed design)
- Accompany each sketch with a concise narrative describing:
  - Operational, cultural, commercial and visitor experience factors (drawing on internal Sheffield Museums' expertise)
  - Accessibility, inclusion and compliance requirements
  - Opportunities for land use allocation, pedestrian and visitor flow, access improvements, and site connectivity
  - Spatial organisation and key adjacencies - Site boundaries, opportunities for enhancement, spatial constraints.
  - Phasing considerations and potential impacts
- Opportunities, constraints, and heritage considerations - heritage significance, consideration of listed status, conservation area requirements, and fabric sensitivity.
- Integration of sustainability and climate adaptation principles - by identifying quick-win opportunities to improve energy efficiency, reduce carbon emissions, utilise low-impact materials, and enhance future-proofing, alongside incorporating climate-resilience measures.
- Site boundaries, opportunities for enhancement, spatial constraints.

This should articulate the strategic implications of proposed directions without requiring detailed design development.

### 3. Implementation, Delivery, and Costing Plan

The consultant/s will develop a clear, prioritised, phased roadmap for the short, medium and long term. Prioritisation should consider factors such as statutory compliance, health and safety, asset condition, impact on collections, operational resilience, visitor experience and potential income generation.

#### Requirements

- A clear prioritisation framework in consideration of:
  - statutory compliance
  - health and safety
  - asset condition and operational resilience
  - impact on collections
  - potential income generation
  - visitor experience
- High-level capital cost estimates, including allowances for:
  - professional fees
  - contingency
  - inflation
- Lifecycle and maintenance cost projections over ten years
- A cost-benefit appraisal supporting value for money and long-term investment planning.

This should be underpinned by a transparent prioritisation framework considering urgency, impact, cost and dependencies. The implementation plan should align phasing strategies with operational needs and potential funding opportunities, identifying key actions, decision points, resourcing requirements and long-term estate management considerations.

#### Expected Outputs

The appointed consultant/s will produce:

- A strategic, high-level estate-wide report containing:
  - Site analyses and condition assessments against CIBSE guidelines to allow for planning
  - Prioritised capital and revenue investment recommendations
  - Initial masterplan concepts
  - Phased implementation roadmap
  - High level costings and lifecycle projections

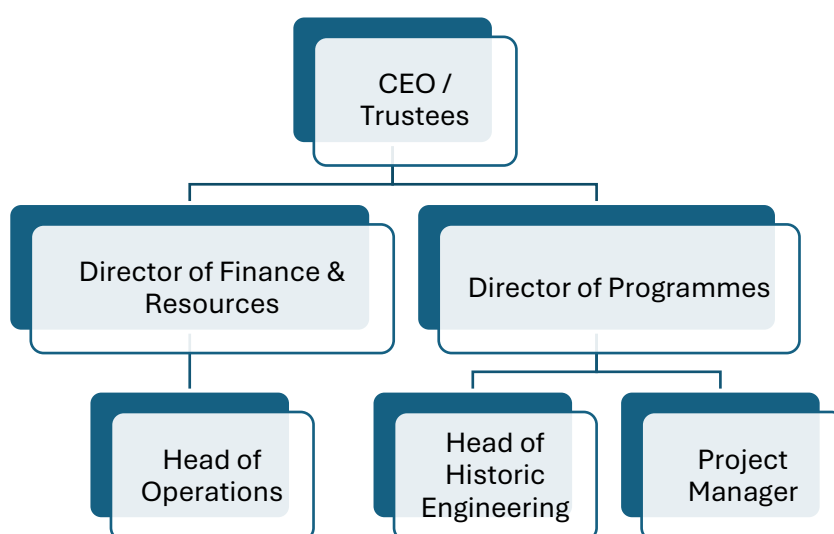
- To support investment planning, the report could also include the following summary tools:
  - Technical analyses
  - Estate condition summary dashboard
  - 10-year capital investment programme
  - Risk register and dependencies map
  - Site-by-site summaries
  - Prioritisation matrix

#### The consultant/s will:

- Lead co-design sessions and progress meetings with the Sheffield Museums Team (minimum: 3 face to face meetings + 1 familiarisation visit **per site** + final meeting to present the final report).
- Provide monthly progress updates to Directors/Project Manager
- Present findings and recommendations to the Executive, Heads of Service and Trustees.

#### Reporting

The Director of Finance and Resources is leading this work for Sheffield Museums, supported by the Chief Executive Officer, Director of Programmes and Trustees. The main point of contact will be the Project Manager (Defining a Decade) The consultant/s will work closely with the Head of Operations and Head of Historic Engineering and are expected to engage with Directors, Trustees, and partners within the local authority, as well as with other Sheffield Museums colleagues.



## **Experience required**

The consultant/s should demonstrate a strong track record in;

- Heritage estate management, museum or cultural sector master-planning, or capital project planning.
- Experience working with listed buildings, conservation areas, and complex multi-site estates.
- Capability in lifecycle costing, capital forecasting, and feasibility studies.
- Understanding of museum operations, visitor experience design, and collection care requirements or similar.
- Commitment to sustainable design, access, and inclusive practice.
- Advising cultural organisations on identifying priorities.
- Communicating strategic analysis findings in a supportive and useful way.
- Excellent communication and stakeholder engagement skills.

The consultant/s should be able to travel between all Sheffield Museums sites and attend meetings in person and online.

## **Quotation requirements**

Interested consultants should provide:

- Organisational background, an outline of your relevant experience and suitability for this work including 2 similar estate management plans or heritage/museum estate projects that you have delivered in the last 5 years (10-page limit)
- A plan for the work that demonstrates your approach to communication and effective working with internal stakeholders, and includes an outline methodology for the work, and a programme timeline (1000-word limit)
- Proposed team and CVs
- Fee proposal based on the above scope, with a breakdown of costs including day rates and expenses
- Contact details for two reference organisations where you have undertaken similar work in the last three years
- Evidence of your insurance as follows:
  - Public Liability – minimum indemnity sum in respect of each and every event - £1 million
  - Employers Liability - minimum indemnity sum in respect of each and every event - £1 million
  - Professional Indemnity - minimum indemnity sum in respect of each and every event - £1 million

## Timeline

Work must align with the timescales of the 18-month *Defining a Decade* programme. A detailed schedule will be developed collaboratively at inception, but key milestones are anticipated to include:

- Brief advertised: 16 March – 30 April 2026
- Optional site viewing: 15, 16, 21 April
- Evaluate Responses: 5 & 6 May
- Interview notifications: 7 May
- Proposed interview date: 14 May
- Appoint 18 May
- Contract: 19 May – 2 June
- Project site visits: 3 – 17 June
- Co-design sessions: w/c 27 July
- Post co-design Direction meeting: w/c 24 August
- Concept sign off: w/c 14 September
- Final report and presentation: w/c 26 October

## Site visits

You are welcome to visit our museums as a member of the public at any time during our usual opening hours to familiarise yourself.

1 hour site visits to view a selection of Mechanical and Engineering plant at Weston Park Museum are available by arrangement on 15<sup>th</sup>, 16<sup>th</sup> and 21<sup>st</sup> April. If you would like to arrange a site visit please contact [pamela.cunningham-hayes@sheffieldmuseums.org.uk](mailto:pamela.cunningham-hayes@sheffieldmuseums.org.uk)

## Budget

We anticipate that this work will be valued at c£45k excluding VAT.

Your fee should include all expenses and exclude VAT.

Please submit quotations to [pamela.cunningham-hayes@sheffieldmuseums.org.uk](mailto:pamela.cunningham-hayes@sheffieldmuseums.org.uk) by midnight on Thursday 30<sup>th</sup> April 2026.

## Contact Us

Questions should be directed to Pamela Cunningham-Hayes, Project Manager (Defining a Decade) [pamela.cunningham-hayes@sheffieldmuseums.org.uk](mailto:pamela.cunningham-hayes@sheffieldmuseums.org.uk)

## Evaluation Criteria

Criterion	Weighting
Quality of methodology & understanding of brief	30%
Relevant experience & technical expertise	25%
Quality of proposed team	15%
Cost/value for money	20%
Social value & sustainability (finance & environmental)	10%

## **Appendix 1**

An overview of the museums and collections can be found on our website

<https://www.sheffieldmuseums.org.uk/>

Buildings and their significance included in the Sheffield Museums estate for the purposes of this review include:

### **1. Millennium Gallery**

The Millennium Gallery is an outstanding venue for art, craft and design, in the heart of Sheffield's City Centre. Opened in 2001, the purpose built Gallery is the permanent home of Sheffield's unique Designated Metalwork Collection and The Guild of St George's Ruskin Collection and plays host to major temporary exhibitions of art, craft, and design as well as a large events/corporate hire space. The building was designed by architects Pringle Richards Sharratt. Fundamental to the design and flow of the Millennium Gallery is the internal 'avenue', from the entrance on Arundel Gate to the Winter Garden, off which the four galleries are located.

The building has components that are coming to the end of their initial 25 year lifecycle. An air handling unit replacement project will be complete by April 2026.

Documents that will be shared include:

- Site Plans

### **2. Graves Gallery**

Just across from the Millennium Gallery, you will find the Art Deco home of the city's visual art collection. Graves Gallery is located on the top floor of the Central Library building. Sheffield City Council, working with Sheffield Museums, are currently undertaking a feasibility study to understand the future potential of this building for the city centre. Central Library listing <https://historicengland.org.uk/listing/the-list/list-entry/1390682?section=official-list-entry>

Documents that will be shared include:

- Site Plans

### **3. Weston Park Museum**

Weston Park Museum tells the stories of Sheffield and its people, from prehistory to present day. Originally opened in 1875, it underwent a £19m redevelopment and refurbishment, and re-opened in 2006. The building comprises a series of connected structures from across this time period.

Listing <https://historicengland.org.uk/listing/the-list/list-entry/1001340?section=official-list-entry>

Documents that will be shared include:

- Site Plans

#### **4. Kelham Island Museum**

Kelham Island Museum comprises a series of buildings. The main building was the power station for the first electrified tram way in Sheffield and dates to 1898. Heritage Lottery Fund projects throughout the 1990s and 2000s brought all site buildings into use. The site is in the flood risk zone (with flood defences) and is complex, with a large visitor attraction, café, pub and tenants, plus offices, collections stores, and function spaces.

Listing <https://historicengland.org.uk/listing/the-list/list-entry/1392387?section=official-list-entry>

Documents that will be shared include:

- Site Plans

#### **5. Abbeydale Industrial Hamlet.**

This waterpowered agricultural tool making site dates to before 1750. The historic buildings and dam are maintained by Sheffield City Council. The café and modern workshops were built 2014 and should be included in the estate assessment. Open to visitors seasonally April-October, with the busy café open all year, offices, workshops, and 5 tenants operating all year round. A National Lottery Heritage Funded project has just been completed to improve visitor experience.

Monument listing <https://historicengland.org.uk/listing/the-list/list-entry/1004822?section=overview>

Grade I and II listing <https://historicengland.org.uk/listing/the-list/list-entry/1246418?section=official-list-entry>

Documents that will be shared include:

- Site plans
- Conservation Management Plans prepared in 2012.

#### **6. Shepherd Wheel Workshop**

Shepherd wheel dates to the mid-1500s and the maintenance of the buildings and dam is undertaken by Sheffield City Council. Sheffield Museums maintain and run the historic machinery. Operated at weekends, supported by the Friends of Porter Valley

Monument listing <https://historicengland.org.uk/listing/the-list/list-entry/1002931?section=official-list-entry>

Grade II\* listing <https://historicengland.org.uk/listing/the-list/list-entry/1255068>

Documents that will be shared include:

- Site plans
- Conservation Management Plan

#### **7. Collections Store**

This is a large secure warehouse space, shared with another service.

Documents that will be shared include Site Plans