

Project Manager Brief

RIBA Stage 4 – Technical Design, Procurement & Funder Readiness

Saving the Home of Auld Lang Syne

Robert Burns Ellisland Trust (RBET)

1. Project Background

The Robert Burns Ellisland Trust (RBET) is delivering Saving the Home of Auld Lang Syne, a major heritage regeneration project at Ellisland Farm, Dumfries & Galloway — the home where Robert Burns wrote many of his greatest works, including Auld Lang Syne.

The project involves:

- The sensitive repair, conservation and adaptation of A-listed historic buildings
- Selective new-build elements, including off-grid infrastructure
- External landscape and setting works
- Creation of a new museum and interpretation space within a former farm building
- Future commissioning of interpretation and exhibition designers
- A strong emphasis on historical authenticity, including taking one building back to the period of Burns' occupancy

The project is guided by an existing Conservation Plan, which pre-dates the current project and must be treated as the primary guiding document for all design, technical, and procurement decisions.

The Trust has an adopted Interpretation Plan, completed activity and business plans, and is working towards major capital fundraising, including local authority, Scottish Government, and National Lottery Heritage Fund (NLHF) Delivery Stage funding.

2. Current Project Stage

- RIBA Stage 3 (Developed Design) is complete / nearing completion
- Extensive surveys and investigations have been undertaken during RIBA Stage 3, including building condition, heritage, and site-based surveys
- The project is fundraising to proceed to RIBA Stage 4 (Technical Design)
- Procurement of the building contractor is anticipated during or following RIBA Stage 4
- The architect (Lead Designer) and Quantity Surveyor propose to manage the operational aspects of procurement

RBET wishes to appoint a client-side Project Manager to support RIBA Stage 4, procurement governance, and funding readiness.

This appointment is dependent on funding.

3. Purpose of the Appointment

The Project Manager will provide senior client-side project management support during RIBA Stage 4 to:

- Protect the Trust's interests as client
- Ensure the technical design is fully coordinated, compliant, and affordable
- Ensure that all work is fully aligned with the Conservation Plan
- Integrate additional conservation research and existing survey information into the evolving design
- Ensure procurement is transparent, funder-compliant and defensible
- Support fundraising and Delivery Stage readiness

This is a strategic client-side role, working closely with the Trust's Director and senior consultants.

4. Scope of Services

A. Client-Side Leadership & Governance

- Act as the Trust's day-to-day project management lead during RIBA Stage 4
- Establish and manage a clear RIBA Stage 4 programme, including:
 - Design fees
 - Building Warrant and listed building consent conditions
 - Procurement milestones

- Ensure that the Conservation Plan is embedded in decision-making, change control, and approvals
- Provide clear reporting to the Trust and trustees

B. Design Team Oversight & Coordination

- Attend and contribute to design team meetings, chairing where appropriate
- Ensure effective coordination between:
 - Architect / Lead Designer
 - QS
 - Engineers
 - Conservation specialists
 - Landscape consultants
- Ensure that existing RIBA Stage 3 survey information is properly understood, coordinated, and fully reflected in the technical design
- Monitor the quality, completeness and integration of technical design outputs
- Ensure heritage and conservation requirements are fully embedded and not compromised

C. Integration of Conservation Research

- Manage the interface between:
 - The existing Conservation Plan
 - Newly commissioned conservation research
 - The architectural and technical design team
- Ensure research findings and conservation policies are:
 - Properly interpreted
 - Incorporated into drawings, specifications and methodologies
 - Reflected consistently across all disciplines
- Support the ambition to authentically restore one building to the Burns period

D. Cost, Risk & Value Management

- Work closely with the QS to:
 - Track the cost plan through RIBA Stage 4
 - Ensure transparency of assumptions, allowances and exclusions
 - Monitor and manage heritage-related risk and contingency
- Ensure that cost decisions respect the priorities and policies set out in the Conservation Plan
- Maintain and update the client risk register

- Support value-based decisions aligned with conservation and interpretation priorities

E. Procurement Oversight, Compliance & Funder Assurance

While the operational management of procurement will be undertaken by the Quantity Surveyor and Lead Designer, the Project Manager will play a key role in ensuring that procurement is:

- Fully aligned with the requirements of current and potential funders, including:
 - Local authority capital funding
 - Scottish Government funding
 - National Lottery Heritage Fund (NLHF) Delivery Stage
- Consistent with the Conservation Plan and heritage obligations
- Transparent, auditable and compliant with best practice for charitable and publicly funded projects

The Project Manager will:

- Advise the Trust on the overall procurement strategy, ensuring conservation requirements are properly reflected
- Review and comment on tender documentation to ensure:
 - Conservation Plan policies are clearly embedded
 - Existing survey information is appropriately referenced
- Support the Trust in agreeing tender evaluation criteria that reflect heritage quality as well as cost
- Provide independent client-side assurance on the tender process and recommendation for appointment

F. Fundraising & Delivery Stage Readiness

- Work closely with the Trust and local authority partners to support:
 - Capital funding bids
 - NLHF Delivery Stage application
- Ensure that RIBA Stage 4 outputs demonstrate:
 - Alignment with the Conservation Plan
 - Robust use of existing survey evidence
 - Clear readiness for delivery

G. Interface with Interpretation & Future Phases

- Ensure technical design allows for:
 - Future interpretation and exhibition design

- Integration of stories across buildings and landscape
- Maintain alignment between:
 - Conservation Plan
 - Interpretation Plan
 - Architectural and landscape design
- Support a smooth transition into later delivery and interpretation stages

5. Deliverables

The Project Manager will provide:

- RIBA Stage 4 Client Programme
- Updated Project Risk Register
- Procurement oversight and compliance notes
- Funder-ready procurement and delivery inputs
- Brief monthly written progress reports (1–2 pages)

6. Time Commitment & Fee

- Equivalent of 2 days per week (variable to the demands of the project) Approximate total input: circa 48–52 days
- Appointment to be on a fixed fee basis, with a clear scope and cap
- Any additional services to be agreed in advance

7. Skills & Experience Required

Essential:

- Senior client-side project management experience
- Strong heritage experience, ideally involving A-listed buildings
- Demonstrable experience working with and applying Conservation Plans
- In-depth understanding of RIBA Stage 4 and procurement
- Experience of publicly funded / NLHF-supported projects
- Excellent communication and reporting skills

Desirable:

- Experience of NLHF Delivery Stage
- Familiarity with Scottish planning, listed building and procurement contexts

- Experience integrating extensive survey evidence into technical design

8. Reporting & Relationships

The Project Manager will report to the Director of the Robert Burns Ellisland Trust and work collaboratively with the architect (Lead Designer), QS and wider consultant team.

9. Appointment Period

The appointment is for RIBA Stage 4 only, with no automatic extension into delivery.

However, the trust reserves the right to continue the appointment into RIBA future RIBA stages, by mutual agreement.

Joan McAlpine
Business Development Manager
Robert Burns Ellisland Trust
(Scottish Charitable Incorporated Organisation SC049973)