

Fortifying the Future

PROJECT MANAGEMENT PLAN

November 2024



This plan sets out how Snodhill Castle Preservation Trust (SCPT) will deliver Fortifying The Future, a three-year project that aims to secure the future of Snodhill Castle.

The project is made possible with The National Lottery Heritage Fund. Thanks to National Lottery players, we will be able to establish the castle's unique place in our national story and engage more people in its future.

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Appendices:

Full project schedule (Excel spreadsheet)
Full project cost plan (Excel spreadsheet)
Risk Register (Excel spreadsheet)
Cash flow projection (Word document)

Version

Version 1
Date: 09.12.24

About Snodhill Castle

Snodhill Castle is a large, nationally significant C11 motte-and-bailey castle and a designated Scheduled Monument in Herefordshire. It was likely constructed around 1068 by William FitzOsbern as part of Norman efforts to control the Welsh Marches. It has connections with many prominent figures in medieval history including the De Chandos family who held it for 328 years, and Elizabeth I who gave it to her favourite courtier, Robert Dudley.

Standing remains include a keep, defensive walls, a massive tower and chapel. Below ground we've discovered a complex postern gate and potential main gatehouse.

In 2021, we discovered Stone and Bronze Age evidence suggesting a much longer history of occupation.

The presence of an ancient pear orchard alongside wood-pasture ranks as a UK BAP habitat of principal importance in England. Semi-natural broad-leaved woodland on the lower slopes includes veteran ash trees and the motte is home to ancient yew trees.

These varied habitats and the castle walls are used by a wide range of birds, at least two types of bat, slow worms, toads, a wide variety of invertebrates, mammals including deer, badgers and harvest mice.

Project context

SCPT was formed in 2016 to save the site and we now hold the castle under a 999 year lease. With the support of Historic England, we rescued the castle from a perilous state so that it is now a safe and beautiful place to visit. To maintain public access and conserve the ruins, we carry out constant vegetation management.

Recently, archaeological digs on the site have shown that Snodhill Castle is far more significant and unusual than previously known. Further research and archaeological investigations are needed if we are to properly understand Snodhill Castle's place in our national story.

Public interest in the site is growing, particularly since featuring on the BBC's Digging For Britain series. However, the lack of water supply, shelter, toilet facilities and internet access limit the activities that can take place.

Our trustees include local residents and experts in castle history and conservation. SCPT is currently over-reliant on a small number of people who will eventually retire, putting the organisation at risk. Trustees do not have access to a shared IT system which hampers the smooth running of the organisation.

In 2024, SCPT was awarded £201,104 by The National Lottery Heritage Fund for this project, which began in November.

Logic model

This model outlines in brief how the project is designed to deliver our objective of securing the future of Snodhill Castle



Approved purposes and activities

The National Lottery Heritage Fund has given the project funding to achieve specific Approved Purposes. The team will deliver the following activities in order to deliver them.

Approved purpose	Funded activities
Commission a consultant to undertake historical research and provide a report	Historical research
	Accessible archive
Commission a consultant to undertake an audience development review and produce an engagement strategy through consultation with target audiences	Audience review & engagement strategy part 1
	Audience review & engagement strategy part 2
Ensure high visibility acknowledgement of The National Lottery Heritage Fund and National Lottery players on site, online and in all activities.	Apply acknowledgment tools throughout
Create an accessible digital information management system, calendar and email group	Information management system
Carry out site specific surveys, including a commissioned habitat and ecology survey and conservation management plan	Habitat & ecology survey. Condition survey on standing remains. Statement of significance.
	CMP
Update current business plan and strategy	Business plan & strategy update
Undertake a skills audit and revise volunteer and trustee training and recruitment	Recruit trustees & volunteers
	induction process
	skills audit
	skills training
Hire a Project Officer, 0.5 FTE on a three-year contract to oversee the project.	appoint project officer
Secure necessary permissions and build facilities on site, including WiFi, field shelter, water supply and toilets.	set up non-potable water supply
	Install solar powered WiFi
	Install solar powered camera
	Install tap to donate equipment
	SMC pre-app
	SMC for shelters etc
Planning permission for shelters etc	

Approved purposes and activities continued

Approved Purpose	Funded activities
Collaborate with The Cart Shed and Family Place Foundation to deliver green care therapy, including (but not limited to), community digs, open days, skills-development and volunteering options	Develop collaborations
	SMC for Community Dig 1
	Community dig 1
	Other volunteering projects
	The Cart Shed project
	SMC for community dig 2
	Family Place Foundation project 1
	Community Dig 2
Commission accessible content for a stronger digital presence, developed in line with the Heritage Fund's guidance and requirements for digital outputs.	Digital content
Collaborate with New Model Institute for Technology and Engineering to use the castle as an educational resource and undertake a feasibility study	NMITE collaboration
Commission an independent and external consultant to undertake an evaluation throughout the project	Project evaluation
	Evaluation report
Project management	create project plans

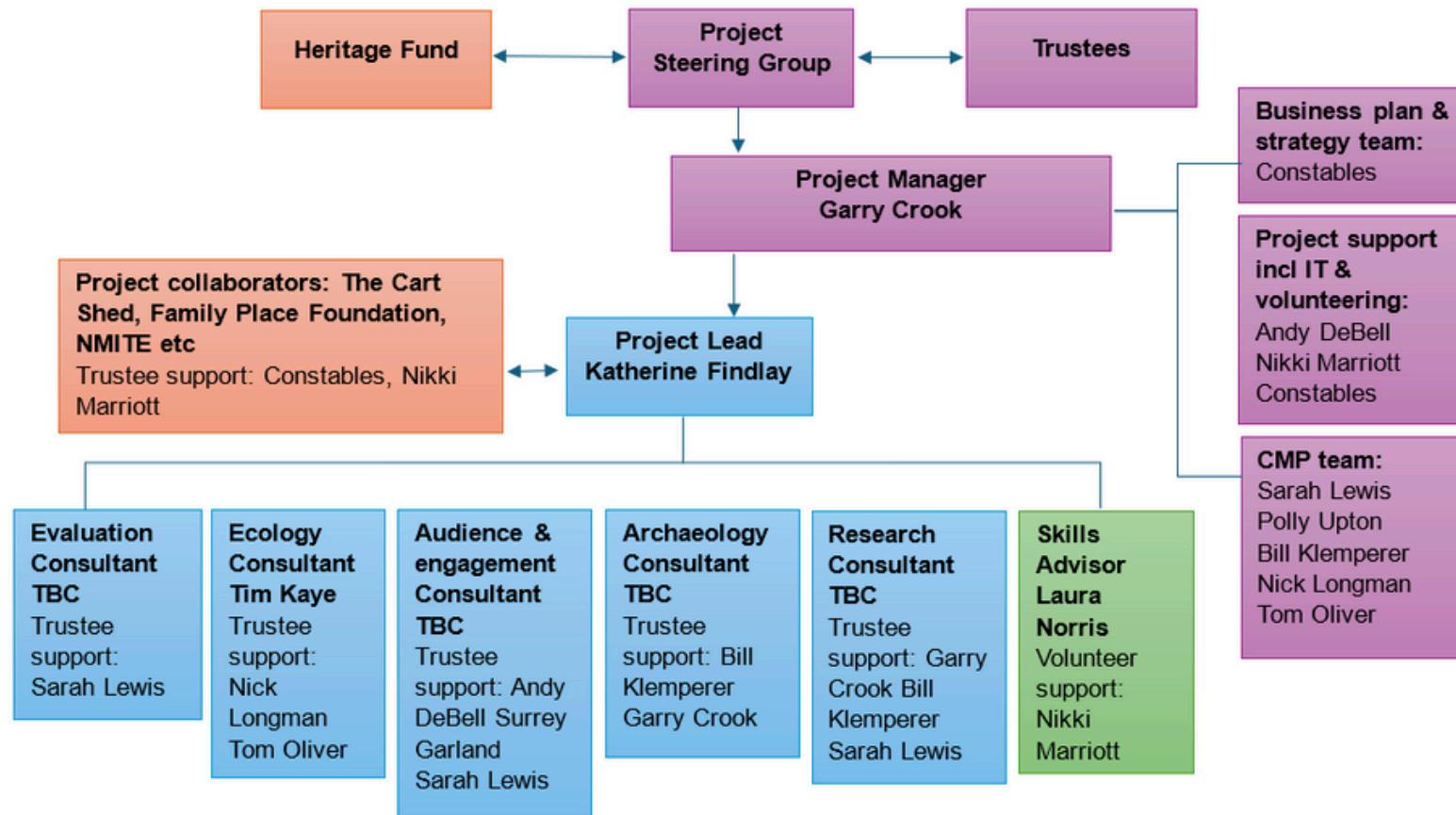
Investment Principles

In planning how to carry out the above activities, the team will ensure that the project contributes to the National Lottery Heritage Fund's Investment Principles:

- Saving heritage
- Protecting the environment
- Inclusion, access and participation
- Organisational sustainability

Project organogram

Key: External SCPT Contractor Pro bono



SCPT Constables: Garry Crook (Chair), Nick Longman (Vice Chair) Surrey Garland (Treasurer), Lou MacIntyre (Secretary), Sarah Lewis

Responsibility assignment matrix

Responsible Accountable Consulted/involved Informed

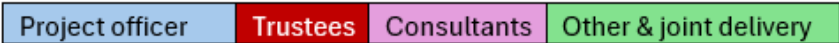
ACTIVITY	Project Manager	Constables/ volunteers	Project Lead	Contractor	Partner organisation	Trustees
Historical research	C	C	A	R	I	I
Accessible archive	A	C	R	N/A	I	I
Audience review & engagement strategy part 1	C	C	A	R	I	C
Audience review & engagement strategy part 2	C	C	A	R	I	C
Create acknowledgement plan and apply throughout	A	C	R	N/A	I	I
Information management system	A	R	C	R	N/A	I
Habitat & ecology survey	A	R	I	R	N/A	I
CMP	A	R	I	N/A	I	C
Business plan & strategy update	A	R	C	N/A	N/A	C
Recruit trustees & volunteers	A	R	C	N/A	C	C
Induction process	A	R	C	N/A	N/A	C
Skills audit	C	C	A	R	N/A	C
Skills training	C	C	A	R	N/A	C
Appoint project officer	A	R	N/A	N/A	N/A	I
Set up non-potable water supply	A	R	I	N/A	N/A	I
Install solar powered WiFi	A	C	R	N/A	N/A	I
Install solar powered camera	A	C	R	N/A	N/A	I
Install tap to donate equipment	A	C	R	N/A	N/A	I
SMC pre-app	A	C	R	N/A	C	I
SMC for shelters etc	A	C	R	N/A	C	I
Planning permission for shelters etc	A	C	R	N/A	C	I

Responsibility assignment matrix continued

ACTIVITY	Project Manager	Constables/ volunteers	Project Lead	Contractor	Partner organisation	Trustees
Develop collaborations	A	C	R	N/A	C	C
SMC for Community Dig 1	A	C	R	N/A	C	I
Community dig 1	C	C	A	R	N/A	C
Other volunteering projects	A	R	C	N/A	N/A	C
The Cart Shed project	C	C	A	N/A	R	I
SMC for community dig 2	A	C	R	N/A	N/A	I
Family Place Foundation project 1	C	C	A	N/A	R	I
Community Dig 2	C	C	A	R	N/A	C
Family Place Foundation project 2	A	C	A	N/A	R	I
Digital content	C	C	A	R	N/A	C
NMITE collaboration	A	C	A	N/A	R	I
Project evaluation	C	C	A	R	C	C
Evaluation report	C	C	A	R	I	I
Project administration	A	C	R	N/A	N/A	I
Project reporting	A	C	R	N/A	N/A	I

Schedule

An expanded schedule is appended to this document



TASK	2024	2025	2026	2027
Historical research				
Accessible archive				
Audience review/engagement strategy 1				
Audience review/engagement strategy 2				
Apply acknowledgment tools throughout information management system				
Habitat & ecology survey				
CMP				
Business plan & strategy update				
Recruit trustees & volunteers				
induction process				
skills audit				
skills training				
appoint project officer				
set up non-potable water supply				
Install solar powered Wi-Fi				
Install solar powered camera				

Finance

Outline budget

Project element	Total allocated
professional fees	117,038.00
recruitment	985.2
Event Costs	21,533.60
Digital Outputs	6,600.00
Equipment & Materials	11,794.57
Training for Volunteers	2,400.00
travel for volunteers	7,002.00
Other	5,000.00
Publicity & promotion	1,039.00
Evaluation	90
New Build work	8,155.00
Contingency incl FCR & inflation	19,466.63
TOTAL	201,104.00

A detailed cost plan and a cash flow forecast are appended to this document

Financial management

A spreadsheet detailing all expenditure and showing the live budget position has been created and is held by the Project Lead.

The budget spreadsheet is held in a shared folder so key trustees including the Treasurer can view the live spreadsheet.

The Project Lead will manage the day-to-day budget. All invoices will be sent to the Project Lead in the first instance to be logged on the budget spreadsheet.

The Project Lead will pass all invoices to the Treasurer for approval and payment.

The Project Lead will file all invoices to be collated and attached to grant draw downs.

The Project Lead will produce budget reports for trustees at regular intervals.

All decisions on expenditure will be made by the core group of trustees (the Constables).

If any significant adjustments to the budget are required, the Constables and the Project Lead will consult with the project's NLHF Investment Manager before any action is taken.

Procurement approach

The project needs to recruit a number of consultants in addition to the Project Lead and Ecologist who have been appointed.

Consultant/ supplier	Service	Anticipated Contract sum incl VAT	Advertising	Procurement
Historian	Documentary research	£7,200	Send brief to known specialists in the field	< £10 so we will invite responses from at least 3 providers if possible
Engagement strategy partner	Audience review & engagement strategy	£40,000	Advertise via Heritage Trust Network, Herefordshire County BID website, Leicester University museums jobs desk & LinkedIn Jobs	>£10k but <£50k we will seek a minimum of 3 quotes based on the brief
Specialist consultant	Evaluation strategy & report	£10,000	Advertise via Herefordshire County BID website, Leicester University museums jobs desk & LinkedIn Jobs, & send brief to known suitable providers	£10k so we will invite responses from at least 3 providers if possible
Archaeologist	Community Dig 1	£6,600	N/A as specialist supplier with unique knowledge required	Approach supplier (Tim Hoverd) to agree terms
Archaeologist	Community Dig 2	£6,600	N/A as specialist supplier with unique knowledge required	Approach supplier (Tim Hoverd) to agree terms, dependent on outcomes of dig 1

SCPT will support the local economy where possible and will encourage ways of working that minimise unnecessary travel.

SCPT has some contacts in all the relevant fields already. We will also seek contacts from our project collaborators and from local community groups that are currently delivering similar projects. We will send our briefs to these contacts in addition to advertising more widely where the contract sum is over £10,000.

Detailed briefs will be written for all services. Each brief will provide criteria on which responses will be assessed. Choices will be made accordingly but also based on interview in the case of Evaluation Consultant and Engagement Strategy Partner.

Governance and reporting

SCPT is a non-membership, charitable organisation with a CIO structure. It currently has 22 trustees, made up of local residents and individuals with a specialist interest in the site. The Chair of SCPT, Garry Crook is the Project Manager of Fortifying the Future and the Chair of the project's Steering Group. The freelance Project Lead, Katherine Findlay, reports to the Steering Group. The project team also includes trustees and consultants as shown on the organogram on p7.

Steering Group

The project Steering Group meets quarterly, prior to progress meetings with representatives of The National Lottery Heritage Fund (below). Its members are:

Garry Crook (SCPT Chair)
Surrey Garland (SCPT Treasurer)
Sarah Lewis (SCPT trustee)
Lou MacIntyre (SCPT Secretary)
Nick Longman (SCPT Vice Chair)
Andy DeBell (SCPT trustee)
Nikki Marriott (SCPT volunteer)

The Project Lead will prepare progress reports, financial statements and risk updates for approval by the Steering Group. In between Steering Group meetings, the Project Lead will liaise with the SCPT Constables.

Reporting to The National Lottery Heritage Fund

The project has been assigned an Investment Manager, Amy Hitchings, and a RoSS consultant, Kate Measures. The project team will meet with them quarterly. The project team will present progress reports (using the Heritage Fund's Progress Report Form), financial statements and risk updates as agreed by the Steering Group. At the end of the project, the team will produce a final evaluation report based on continuous evaluation throughout the project.

Acknowledging our grant

The project team will acknowledge the support of The National Lottery Heritage Fund using these methods:

Activity	Acknowledgement statement	Acknowledgement stamp	Heritage Fund quote	Heritage Fund 'About us' statement/notes to editors	Heritage Fund article
PR activity: for example, press releases, interviews	✓	✓	✓	✓	
Digital: for example, websites, new digital material	✓	✓			✓
Social media channels: Facebook, Instagram	✓	✓			
Events: material including digital invitations & tickets, signage		✓			
Corporate materials: for example, annual reports	✓	✓	✓		
Signage for new structures or outside spaces		✓			
Funding of staff or placements: job descriptions or job adverts	✓	✓			

The project team will pass all proposed communications to the Investment Manager for approval by the MarComms team. We will refer to the latest version of the Acknowledgement Toolkit when designing new materials and we will refrain from using acronyms to refer to the National Lottery Heritage Fund.

Acknowledging our grant continued

Acknowledgement statements

Full version:

Using money raised by National Lottery players, The National Lottery Heritage Fund supports projects that connect people and communities with the UK's heritage. Fortifying the Future is made possible with The National Lottery Heritage Fund. Thanks to National Lottery players, we have been able to establish the castle's unique place in our national story and engage more people in its future.

Shortened version:

Fortifying the Future is made possible with The National Lottery Heritage Fund. Thanks to National Lottery players, we have been able to establish the castle's unique place in our national story and engage more people in its future.

Acknowledgement stamps

The project will use the English language versions of The National Lottery Heritage Fund's stamps:



Communication

Activity	When/how often	Audiences	Channels	Goal	Responsible
Formal reporting	quarterly	NHLF	quarterly report template	Progress monitoring & evaluation and exchange of advice to ensure project success & minimise risk	Project Manager & Project Lead
Informal updates	Quarterly On achievement of milestones	trustees	Digest of quarterly report WhatsApp updates	Update & involve trustees who are not on the project board	Project Steering Group
Partner liaison	As required	NMITE, Cart Shed Family Place Foundation Herefordshire County BID Collaborations developed within the project	Personal interaction Digest of quarterly report where appropriate Informal updates Shared press releases	Facilitate collaborations. Develop new collaborations. Identify & develop synergies.	Project Lead supported by Steering Group
Public awareness raising	On achievement of milestones & in advance of project activities e.g. community digs, open days, volunteering projects, consultation events	Lottery Players Residents Collaborators Potential audiences Site users Donors Specialist interest groups Heritage Trust Network	Herefordshire County BID news desk Visit Herefordshire SCPT Website Social media posts Dorstone Forum Peterchurch online community group Hay on Wye community notice board Bredwardine Forum Parish magazines (The Link & Golden Valley News) Hereford Times Wye Local Local radio	Acknowledge funding. Increase access to heritage. Engage wider audiences with the project. Fund raising.	Steering Group

Communication continued

Activity	When/how often	Audiences	Channels	Goal	Responsible
Volunteer/trustee recruitment	On-going	Potential trustees & volunteers HVOSS & NVCO Armed Forces community	Social media posts SCPT Website Local radio Dorstone Forum Peterchurch online community group Hay on Wye community notice board Bredwardine Forum Parish magazines (The Link & Golden Valley News)	Develop volunteering partnerships Recruit new volunteers & trustees Develop resource for sub-groups to help deliver project	Steering Group – Volunteer's subgroup
Events advertising	In advance of project activities e.g. community digs, open days, castle tours, citizen science days, volunteering events.	Lottery Players Residents Collaborators Potential audiences Site users Donors Specialist interest groups.	Herefordshire County BID news desk Visit Herefordshire SCPT Website Social media posts Dorstone Forum Peterchurch online community group Hay on Wye community notice board Bredwardine Forum Parish magazines Hereford Times Wye Local Local radio	Acknowledge funding. Increase access to heritage. Engage wider audiences with the project.	Steering Group – Secretary & Treasurer Ecologist
Academic/specialist knowledge sharing	Around community dig & research projects	Special interest groups e.g. habitat, local history, archaeology, academics, students, universities, Hereford Museum & Art Gallery, Herefordshire Archaeology &	Individual contacts Seminars & talks to groups. Website discussion forum. Publication following research & archaeology projects.	Engage wider audiences Develop collaborations Grow knowledge of site's ecological & heritage value	Steering Group – research subgroup

Post project

We will maintain the benefits delivered by Fortifying the Future and continue to build SCPT resilience by:

- ▶ Looking at our structure and considering a paying membership that would improve SCPT's financial resilience.
- ▶ Exploring other avenues for grant aid that could support our work.
- ▶ Continuing to explore, promote and communicate the archaeological, historic and ecological interest of Snodhill Castle through site tours, the on-line information, archive and discussion forum created by the project, social media, building links with archaeological departments in universities, academic publication and seminars, and pushing for the castle to feature in the new Hereford Museum & Art Gallery.
- ▶ Continuing to promote the castle in the context of the Welsh Marches by working with other trusts and sites to increase access to heritage and contribute to the local economy.
- ▶ Using the enthusiasm & knowledge flowing from collaborations, created by the project and identified by the engagement strategy, to sustain partnerships and develop new ones – driven by sub-groups of trustees and volunteers.
- ▶ Fundraising to invest in on-going future professional support for our website and the IT resources created by the project.
- ▶ Quinquennial review of the strategy and business plan by a sub-group of trustees & volunteers; and ensuring that future development and financial decisions are only made in the context of these documents.
- ▶ Quinquennial review, by a sub-group of trustees & volunteers, of the site's condition, our management and maintenance plans and prioritisation of resources to deliver them.
- ▶ Always making decisions about the future management and use of the site in reference to the CMP.
- ▶ Continuing to work towards filling SCPT skills gaps through recruitment and training, monitoring this on a quinquennial basis and continuity planning for the future.
- ▶ Celebrating the interest, value and beauty of Snodhill Castle and the work of our volunteers, at events.