



Ripon Museums Trust

Fairer Futures

Tender Brief



Multi-disciplinary Design Team Brief (including conservation management plan)

1. Introduction

Ripon Museum Trust (RMT) was established in 1982 and runs three museums in the heart of Ripon. We are a small Registered Charity and Limited Company. RMT tells the interlinked story of poverty, law, crime, punishment and justice - using a Grade II Victorian Workhouse Museum, Grade II* Liberty Gaol and Police Station, Grade II* Georgian Courthouse and a collection of 9000 objects to explore our themes. Community engagement helps us share stories of this unique heritage prompting people to act for a fairer society. We tell the story of the buildings themselves, the people who lived and worked in them and across all three sites. We put learning at our heart - delivering a changing programme of exhibitions, events, school visits and informal group learning. **Learning is a key Value for RMT – whether directly delivering learning activities, supporting learning within our communities or as continuous organisational learning.** RMT is an Accredited Museum and a Band One National Portfolio Organisation (NPO) with Arts Council England (ACE).

Our Trust's Vision is to use our Heritage Assets to Inspire People to Seek a Fairer Society. Our Museums' Mission is to use the unique trio of the Workhouse, Prison & Police and Courthouse Museums, collections and the stories they tell to help people explore big issues such as fairness, equality, justice and welfare. Through excellent engagement, programming and outreach, together we will inspire people to become compassionate and active citizens, shaping society for the better. We will work for greater participation in our heritage which will enrich lives and improve wellbeing. Volunteering is integral to our organisation; at our core we work as one team. We will make a positive impact on Ripon and the region's cultural and economic capital.

Ripon Museum Trust is an equal opportunity employer and adheres to Fair Recruitment. We welcome applications from all suitably qualified persons regardless of their race, sex, disability, religion/belief, sexual orientation, gender or age. We have an Equality and Diversity Policy, Safeguarding Policy and procedures and Data Protection Policies. We are committed to reducing our carbon footprint and have an Environmental Policy.

RMT wishes to appoint an experienced consultancy team who will progress the Trust's 'Fairer Society' Vision in all aspects of their work, making a step change in community participation with our heritage and themes, developing a strong sense of place and meeting National Lottery Heritage Fund (NLHF) requirements. The consultants should seek appropriate ways to involve our large volunteer community from the very start as an integral part of delivering the Project, supporting involvement, health, wellbeing and teamwork.

2. The National Lottery Heritage Fund project

Our 'Fairer Futures' Project is worth £2.25M and is a substantial first step to delivering our 'Master Plan' for the Trust's future. Delivery of this Project will make significant strides towards achieving our Vision, transform the visitor experience and our engagement work with communities. It will create inclusive new spaces in the Workhouse Museum, open up previously unseen rooms and make our heritage accessible to a wider more diverse audience across all three museums. The Project will use joined up stories of the people who lived, worked and suffered at our three sites. We will make better use of our outdoor spaces and of digital techniques for more immersive engagement. The Project will secure our future and lower our carbon footprint through environmentally sustainable building improvements. The idea for our Project was born out of unease with growing social inequalities which have been

exacerbated by the pandemic. A powerful new Vision for the use of our heritage emerged; to use it to inspire people to seek a fairer society. Over the last 3 years we have continued to develop these ideas and we have consulted widely. Our Project has six key strands:

- **Conservation** of key areas of the Workhouse i.e. Main Block (recently acquired with a Heritage Lottery Fund grant). Conservation work will provide us with new spaces for activities, interpretation and learning. A lift will give access to the former dormitories which will be restored. We will prioritise eco-friendly design; a new roof, an air source heating system and improved insulation will all reduce our carbon footprint and help us become more resilient. Access to and conservation of these areas will ensure preservation of the stories and heritage for the future.
- New **interpretative techniques** will connect stories and visitor experiences across all three museums. With communities we will tell multi-layered stories of those who lived and worked here, bringing the story up to date. We will create a better-quality visitor experience, use digital and other interpretation for outdoor spaces at the Workhouse, improved internal spaces for learning, volunteering and other programming.
- **Community engagement** and co-production will build on our work with people whose voices are often invisible in history. There will be exciting opportunities for new activities at all our museums engaging new people and communities and for placemaking. These build on our work as a NPO and the unique projects we have already delivered.
- Our work to improve **wellbeing** will be built into our activities and reflects our ambition to become a place that demonstrably improves people's wellbeing.
- **Volunteering** is at the heart of what we do, and we will expand and build on this work.
- The value of our work on **placemaking** will increase by generating community wellbeing. We'll build on successful partnerships to develop activities to better explain our heritage. The Project will feed into master planning for the regeneration of Ripon's economy and bringing a wider sense of history and place.

3. Scope

The former Ripon Union Workhouse is situated off Allhallowgate, Ripon. The Ripon Workhouse Museum is located within the former Gatehouse Block and Main Block, with a workhouse garden in the north-east of the site. The main block and gatehouse are both Grade II listed buildings and lie within the Ripon Conservation Area.

The Trust seeks to appoint a comprehensive multi-disciplinary team to design and lead on the construction/refurbishment works at Grade II Listed Ripon Museum Trust as part of the Fairer Futures project so that the completed works maximise the contribution that the architectural features, the evolution of the building and feel of the built heritage to achieve RMT's overall vision for a Fairer Society and to deliver:

- Within the overall capital and revenue budget set for Fairer Futures project.
- To the relevant professional standards for the industry and cultural sector.
- Ultimately to RIBA Stage 6 but with a break clause at RIBA Stage 3 as noted below.
- To produce a Conservation Management Plan (CMP).

The works include: repairs and improvements to the external fabric; refurbishment and conversion of the building to provide improved activity, museum and ancillary accommodation; new mechanical and electrical services; and an extension to accommodate a new lift.

The team will consist of, but not necessarily be limited to:

- Conservation Accredited Architect
- Design Team Leader
- Principal Designer
- Conservation Management Plan Consultant (a additional fee of £9,600 excluding of VAT is ring fenced). This is to be managed by the Architect.
- Structural Engineer

- Services Engineers (mechanical, electrical and plumbing) with expertise in renewable and low carbon technologies
- Access Consultants- To consider both physical and interpretation design
- Services necessary to satisfy planning and other statutory agencies

Please note that the project manager is already in post and the quantity surveyor will be a separate appointment.

Although this Brief is primarily written with reference to the Design Team Leader, across this multidisciplinary team we anticipate that the following services will be required at the various RIBA and project stages. All references should be read as applying to the team as a whole, mobilising and managing the specialist disciplines as they are required to present coherent and fully integrated proposals and reports at all stages.

The Outline Condition Survey sets out the current situation and the capital works which have been identified as part of this project (refer to Appendix A). It also includes a summary of the relevant background documents for the site. The next stage of work will be to develop the recommendations in this report and to co-ordinate design work with the appointed Interpretation and fit out consultants.

The appointed team will also need to review and write the Conservation Management Plan (CMP) for the Workhouse Museum. RMT also has a Conservation Management Plan 2017 written as part of an earlier and completed project on another building on the site which will be made available to the successful consultants. There will be some cross-over issues in terms of historic design and condition. There are also other specific surveys related to aspects of the fabric of the Workhouse which will all be made available.

The anticipated construction cost is in the order of £789,400 exclusive of VAT and exclusive of preliminaries and contingency

Fees are required for RIBA stages 1-6, but the initial appointment would only be up to the completion of RIBA Stage 3. Reappointment for the Delivery Phase is subject to a break clause which is dependent on securing the funding, along with performance during the development phase.

RIBA Stage 1 – Preparation and Briefing

- 1.1 Receive an initial brief from the Client and project manager based on the National Lottery Heritage Fund Round 1 submission covering the vision, aims and objectives of the project, business plan, project budget, outline accommodation schedule and the options considered to date. Take note of the Client's policies for environmental sustainability, inclusive design, heritage skills training and community engagement. Include in a Project Definition Report.
- 1.2 Establish and chair regular design team meetings through the Preparation Stage in order to monitor progress. Circulate minutes of the meetings to the Client's Technical Project Manager and others. The minutes shall record the action and indicate who is responsible for taking that action.
- 1.3 Carry out an inspection of the site and a review of the design exploration to date, including a review of existing documentation and the stage one application. Include the following in the Project Definition Report:
 - advice on matters relating to statutory and legal requirements;
 - initial response to the present condition and use of the building;
 - initial response to the sketch schemes prepared to date, with regard to the Client brief.
 - develop the recommendations in the Outline Condition Statement
- 1.4 Prepare a Conservation Management Plan which establishes the importance and value of the heritage encompassed within the Fairer Futures project, states clearly the current and future risks to that heritage and proposes how that heritage should be cared for in future both to mitigate these threats, to adapt to climate change and to meet the needs of the proposed audiences (as referenced by the Business Plan, Activity Plan and Interpretation Plan) once the Fairer Futures investment has been made and supports, to the maximum extent possible, RMT's Fairer Society agenda.

- 1.5 In consultation with the Client and design team members, prepare detailed briefs and secure competitive quotes for site surveys, investigations and materials testing, etc. Obtain records of existing services. Arrange for the carrying out of all such surveys and investigations authorised by the Client, interpret the results and, if necessary, make recommendations to the Client.
- 1.6 Develop the project brief, agree reporting procedures and meeting schedule and obtain existing information. Include in the Project Definition Report.
- 1.7 Provide material for a RIBA Stage 1 public consultation and access consultation. Make amendments to the brief as agreed with the Client, in response to the outcome of public consultation activities.
- 1.8 Undertake risk assessments and contribute to the Project Manager's risk management process. Include in the Project Definition Report.
- 1.9 Access consultant to work closely with wider project team to explore the needs and requirements of a range of audiences. To make clear recommendations after a review on how access can be improved.
- 1.10 Undertake a review of current infrastructure for energy usage and develop baseline data. Identify ways this can be improved to reduce RMT current environmental impact.
- 1.11 Undertake value management exercises. Include in the Project Definition Report.
- 1.12 Submit Project Definition Report and obtain the Client approval to proceed to Stage 2.

RIBA Stages 2 and 3 - Concept Design and Spatial Coordination

- 2.1 Chair regular meetings with the design team and others throughout these stages to monitor progress. Circulate minutes of the meetings to the Client's representative and others. The minutes shall record the action to be taken and indicate who is responsible for taking that action.
- 2.2 Reaffirm the Client brief and budget in the light of the Stage 1 review.
- 2.3 Present the condition survey, Conservation Management Plan and schedule of further surveys required in a report for the Client and funders.
- 2.4 In co-operation with other members of the design team, develop RIBA Stage 2 Concept Design and submit to the Client including a review of programme and costs. Incorporate advice on energy conservation and energy targets.
- 2.5 Provide to the Client all the information required (to RIBA Stage 2) by the National Lottery Heritage Fund for the Mid Term Review (currently scheduled for Summer 2023), assist with that review process and take part as required in the Review meeting.
- 2.6 Prepare visual information for Client, stakeholder and public consultation. Provide RIBA Stage 2 Concept Design Report and present to the Client, National Heritage Lottery Fund and other stakeholders at a RIBA Stage 2 Review meeting.
- 2.7 Obtain Client approval to proceed to RIBA Stage 3 Developed Design.
- 2.8 In co-operation with the other members of the design team, develop the scheme design within the approved cost and submit to the Client for approval, giving details of proposed specification and services.
- 2.9 Consult as necessary with the Planning Authority and any other statutory authority or relevant advisory body as required, on matters relating to the proposed Works.

- 2.10 In liaison with the other members of the design team, preparation of a cost plan based on the approved cost and the anticipated start and completion dates. Provide advice regarding options for the procurement of the Works.
- 2.11 Provide presentation quality drawings, exhibition boards and materials to facilitate RIBA Stage 3 Developed Design, public consultation. Attend consultation events as required by the Client and partner organisations. Incorporate outcomes as agreed with the client.
- 2.12 Write the Conservation Management Plan (CMP) for the Workhouse Museum site as specified in National Lottery Heritage Fund guidance and produce a final CMP (including Gazetteer) for the Delivery Phase application – currently scheduled for November 2023. The CMP should be completed prior to the design work so that it will inform it. Consultation on the CMP should be undertaken and this should take place prior to the public consultation on the building. The CMP should consider all areas that are impacted by the project changes and brief impact statements may be required for the Trusts other two buildings.
- 2.13 Provide RIBA Stage 3 Developed Design Report and present to the Client, and other stakeholders at a RIBA Stage 3 Review meeting prior to the submission of the Delivery Phase application.
- 2.14 Undertake further scheme development to meet requirements for submissions of Planning and Listed Building Consent. Prepare a detailed specification for the works of repair and conversion. Prepare a design and access statement, heritage impact assessment. Submit the Planning and Listed Building Consent applications.
- 2.15 Lead on the preparation of a ten-year Management and Maintenance Plan (MMP) for the project, working with the QS and wider team to include the preparation of costed schedules of cyclical maintenance and testing to be undertaken by volunteers, tenants /occupiers and contractors and a guide to managing energy efficiency and maintaining a low carbon footprint in the newly restored building.
- 2.16 Prepare and present such other information as might be required to complete the National Lottery Heritage Fund and other funding applications and to respond to assessor's queries.
- 2.17 Obtain Client approval to proceed to RIBA Stage 4 Technical Design subject to the approval of all funding and the confirmation of the client that the project and appointment are to proceed.

Subject to a Break clause – scope in Delivery Phase.

RIBA Stages 4 - Technical Design

- 3.1 Review the National Lottery Heritage Fund stage two award grant conditions and note the approved purposes.
- 3.2 Establish and chair regular meetings with the design team and others in order to monitor progress and to take any action necessary to correct any deficiencies in design information.
- 3.3 Circulate minutes of the meetings to the Client's Project Manager and others. The minutes shall record the action to be taken to rectify any deficiencies and shall indicate who is responsible for taking that action.
- 3.4 In co-operation with the design team prepare a detailed programme for the preparation of design and production information leading up to obtaining tenders for the Works. Provide a copy of the programme to the Client's representative for Client approval.
- 3.5 Provide presentation quality drawings, exhibition boards and materials to facilitate RIBA Stage 4 Technical Design, public consultation. Attend consultation events as required by the Client and partner organisations. Incorporate outcomes as agreed with the client.

- 3.6 Provide RIBA Stage 4 Technical Design Report and present to the Client, and other stakeholders at a RIBA Stage 4 Review meeting.
- 3.7 Ensure the timely exchange of design or other information between the members of the design team.
- 3.8 Establish regular reporting procedures with the Client's representative, identifying those matters which require approval and, where necessary, provide assistance to obtain those approvals.
- 3.9 Make recommendations to the Client on the need for specialist consultants or contractors to design, or to design and execute, any sections of the Works or for specialist suppliers to provide any materials or equipment and obtain the Client's approval and take any action necessary to implement the Client's decision.
- 3.10 Co-ordinate all design work, ensure that the designs are fully integrated and are tested throughout the design phase against costs targets and planning or other controls and take any action necessary. Ensure record of access considerations are kept throughout design process and why key decisions are made.
- 3.11 Ensure that the designs for the Works fully comply with all Statutory Requirements or Regulations including, but not confined to requirements concerning Health and Safety, Planning, Fire, Building Control, etc., and take any action necessary.
- 3.12 Make all necessary submissions to statutory authorities to satisfy Planning or Listed Building Consent conditions and to obtain approvals. Ensure that all utilities and other necessary services are in place both for the construction phase and for permanent operation following completion of the Project.
- 3.13 Give the Client's representative sufficient notice of all approvals, decisions or other matters which require action by the Client and where appropriate assist the client by providing information and making recommendations.
- 3.14 Ensure that life cycle costings and environmental assessment techniques are applied to the design for the Project and adopt solutions giving the best overall value for money and, where this may result in the cost limit for the project being exceeded, make recommendations to the Client and obtain instructions from the Project Manager on how to proceed.
- 3.15 Ensure that the specifications prepared for the Works specifically exclude the use of materials accepted as being deleterious at the time and subsequently ensure that such materials are not used in connection with the Works. Prioritizing environmentally friendly design and materials. Reducing carbon footprint in the supply of materials. To provide information about carbon footprint to the Client.
- 3.16 In co-operation with the other members of the design team, complete the design of the Project up to tender stage.
- 3.17 Discuss with the Client, QS and project manager the need for site inspection staff and obtain instructions.
- 3.18 Consider the most suitable options for the procurement of the Works. Advise on the most appropriate form of Contract to be used. Following discussion with the project manager and other members of the design team, make recommendations to the Client and obtain instructions.
- 3.19 Advise the client on the content and assessment criteria for the Pre-tender Qualification Questionnaire. Assist the Project Manager in the implementation of the first stage selection process.
- 3.20 In liaison with the other members of the design team, make recommendations to the Client on the suitability of contractors who may be invited to submit a tender for the main works and any specialist works and obtain instructions.

- 3.21 In liaison with the other members of the design team, ensure that all drawings, specifications, schedules, bills of quantities or other documents necessary for the placing of contracts are completed and are fully coordinated, are in accordance with the brief approved by the Client and are available on the programmed date.
- 3.22 Ensure that a pre-tender cost check is prepared based on the tender documentation and inform the Client of the result of that check.
- 3.23 Agree with the Client and their Project Manager, final arrangements for the obtaining and assessment of tenders.
- 3.24 Undertake risk assessments.
- 3.25 Undertake value management exercises.
- 3.26 As required in coordination with the Project Manager, arrange for tenders to be returned direct to the Client in accordance with the Client's tendering procedures.
- 3.27 Assist the Client's Project Manager to deal with all enquiries from the contractors during the tendering period and ensure that any clarification on the content of the documentation given to a tenderer is copied to other firms tendering.
- 3.28 Copy all correspondence regarding the obtaining of tenders direct to the Client and Project Manager.
- 3.29 Examine tenders received and, in liaison with the Project Manager and other members of the design team, make recommendations to the Client and advise on any corrective design action which may be required if the lowest tender is higher than the approved cost for the Works and obtain the Client instructions.
- 3.30 Together with the Project Manager and QS ensure that any tender under consideration for acceptance has been subjected to an arithmetical and technical check and that any errors have been resolved in accordance with the Client procedure.
- 3.31 Obtain the Client's instructions regarding the acceptance of a tender.
- 3.32 Together with the Project Manager and QS obtain the Client's approval to proceed to Stage 5 Construction.

RIBA Stage 5 – Construction

- 4.1 As determined by the contract and construction strategy and the appointment of contractor, undertake the role of Contract Administrator.
- 4.2 In liaison with the other members of the design team, provide the Client with drawings or other documents necessary for entering into the contract.
- 4.3 Undertake risk assessments.
- 4.4 Undertake value management exercises.
- 4.5 Provide such assistance as the Client's Project Manager may require in order that they can agree a detailed programme for the Works with the Contractor which specifies completion by the agreed date.
- 4.6 Attend the meetings with the Contractor or with others.
- 4.7 Chair regular meetings with the design team to review design information and monitor the distribution of that information to the Contractor and the other Consultants as may be necessary and circulate minutes of the

meeting to the Client's representative and to the other Consultants. The minutes shall record the action to be taken and shall indicate who is to be responsible for taking that action.

- 4.8 Until completion of the Project, continue reporting to the Client and Project Manager in accordance with procedures established under Stage 3.
- 4.9 In compliance with the selected contract form and construction method, collaborating with the other members of the design team, administer the terms of the Works contract during operations on site and relating to the completion of the Works.
- 4.10 In compliance with the selected contract form and in liaison with the Client and other members of the design team, observe contract Change Control procedures. Adhere to the Client's authorisation levels prior to issue of Architect's Instructions.
- 4.11 Support the Project Manager to ensure that the QS maintains cost management procedures in order to ensure financial control and issues monthly cost reports to the Client's representative.
- 4.12 Until completion of the project, report to the Client's Project Manager at monthly intervals on the progress of the Works.
- 4.13 In conjunction with the Principal Designer ensure that rigorous safety policies are in place and are implemented by the Contractor and sub-contractors working on the site and that there is adequate protection for the public and others and that Health and Safety statutory requirements or regulations are fully observed.
- 4.14 Ensure that rigorous quality management procedures are in place throughout the construction phase. Arrange safe access to parts of the site for public learning and enjoyment (ie. site tours) where possible, and in consultation with the Client Project Manager.
- 4.15 Attend regular meetings with the Contractor and the other members of the design team as necessary in order to monitor the progress of the Works and the production of design information to the Contractor. Provide written reports and monitoring statements as required to satisfy the requirements of the funding bodies and support the Client's Project Manager/QS in making interim grant claims.
- 4.16 Visit the site at regular intervals during the construction of the Works in order to inspect the quality of the work and to monitor progress and ensure that the Works are completed fully in accordance with the contract documents.
- 4.17 Assist the Client to ensure that adequate records and photographs are available at all times throughout the construction phase, to record day to day progress of the Works for client and public viewing.
- 4.18 Inform the Client of any contractual difficulties which may arise during the course of the contract and obtain the Client's instructions.
- 4.19 Liaise as necessary with the other members of the design team/QS and issue interim payment certificates in accordance with the terms of the construction contract.
- 4.20 Together with the Project Manager, inform the Client four weeks prior to the anticipated date of completion of the Works. Assist the Client through the provision of documentation to obtain appropriate insurance ahead of handover and to support any legal transactions.
- 4.21 Instruct contractor to rectify all defects. Issue Certificates relating to the practical completion of the Works.

RIBA Stage 6 - Handover

- 5.1 Ensure that the Works are cleaned, tested and commissioned prior to handover to the Client.

- 5.2 Attend a Client handover meeting and in conjunction with the contractor ensure that the End User understands and accepts the building condition at practical completion. Make arrangements for monitoring and, if necessary, rectification of defects during the Defects Liability Period and ensure that the Client understands the process.
- 5.3 In liaison with the other members of the design team and contractor, organise and attend a Client handover briefing to ensure that all services and systems operations are demonstrated to the Client and End Users, and that all documentation requiring sign off at handover (e.g. Operation / Maintenance Manuals) is issued to the Client within 4 weeks of project completion.
- 5.4 In liaison with the other members of the design team, provide the Client with a set of record drawings and formal written guidance on the operation and maintenance of the Project and its services. Ensure that the Contractor provides all manuals and completes the Health & Safety files, in the formats required.
- 5.5 Issue a list of defects to the Contractor at the appropriate time in accordance with the terms of the Works contract.
- 5.6 Ensure that the Contractor rectifies the defects within a reasonable time and issue a Certificate to the Contractor when all defects have been made good.
- 5.7 Liaise with the other members of the design team and QS regarding final valuation of the Works and report the final cost of the Works to the Client.
- 5.8 Liaise with other members of the design team and QS and issue the Final Certificate and any other documentation required by Client in satisfying the completion requirements of the National Lottery Heritage Fund and other funders.

4. Timetable

The Development Phase work should be carried out from appointment – November 2023 with a draft RIBA2+ plan available by the Mid Term Review currently planned for August 2023 (or other date for mid-stage review as agreed with National Lottery Heritage Fund), and a final RIBA 3 plan submitted in time for the collation of the Delivery Phase application. The programme will be worked up in further detail with the appointed team but there is currently a desire to work to a November 2023 second round submission which it is noted is challenging and will require further discussion. The programme has a hard deadline of completion by February 2024 due to the grant expiry date.

The Delivery stage will be carried out dependent on NLHF Permission to start before currently projected as May 2024 – Spring 2026. It is important to note that planning and listed buildings consent will be required prior to NLHF committee review if not earlier.

5. Fees

There is a budget of £55,717 (excl VAT) for the Development Phase of work (RIBA stages 2 and 3) and £87,800 (excl of VAT) for the Delivery Phase (RIBA stage 4) to completion and agreed snagging period. The fee is inclusive of all travel/subsistence.

The budget for the construction is currently £789,400 (excl of VAT) *not including* preliminaries or contingencies.

The budget for the fit out of interpretation is currently £218,000 (excl of VAT) and £54,500 (excl of VAT) for digital fit out.

A consultant is also sought to create a Conservation Management Plan for RMT and the fee for this is £9,000 (exclusive of VAT). This is either to be provided within the consultancy business tendering for the work or additionally to be procured (subcontracted) by the Design consultancy business tendering for the work.

6. Timescales

Brief supplied	January 4 th 2023
Deadline for questions	5pm 27 th January 2023
Submission	12pm 6 th February 2023
Interviews	w/c 20 th February 2023
Consultants appointed	w/c 6 th March 2023
Development Phase contract completed (break clause)	November 2023

7. Submission requirements:

- Proven track record within the last 3 years of managing this kind of heritage and conservation project (with National Lottery Heritage Fund funding) at a similar value to time and budget – list out projects involved in within last 3 years and the role the consultancy played within those projects.
- A full statement on your proposed approach to completing the work, including a methodology. This should set out your approach to ensuring that the work is delivered on time, within budget and to the quality required.
- Programme including key milestones (this will be more detailed for the development phase than the delivery phase)
- Overall cost, with a breakdown of costs for all team members relating to each stage of work, including daily charge out rate for each team member and anticipated expenses. Travel time for site visits should be clearly set out and are included in the total fee.
- CVs (4 pages each max) and contact details off each member of the team (including Conservation Management Planner) to be assigned to undertake the role, including a short summary demonstrating their suitability, qualifications and experience including membership of relevant professional bodies and adherence to professional standards.
- Details of three technical referees for work of a similar nature within the last 3 years
- Details of any specialist skills or added value (relevant project experience) or access to such skills and/or services at short notice for example please state the consultant who will prepare the Conservation Management Plan.
- Environmental Policy including the supply of goods and services and reducing carbon footprint.
- Provide evidence of Insurances required – Professional Indemnity of £2m, Public Liability of £5m, Employers' Liability £5 million
- State availability for interview in w/c 20th February 2023
- Maximum Tender page length 15 pages (excluding CV's)
- Tenders must be signed by CEO, business owner or equivalent senior representative of the Consultancy.

Please contact our appointed project manager Elanor Hazlehurst on 01543 414 77 or via email at elanor.hazlehurst@greenwoodprojects for all enquires or site visits requests. Please return all submissions to Elanor Hazlehurst via elanor.hazlehurst@greenwoodprojects.com by **12pm February 6th 2023**.

8. Selection Information

Submissions will be assessed on; appropriate experience; a clear understanding of the requirements of the project; a proven track record of successful delivery of similar projects; an approach which is both imaginative and practical and represents good value for money. We would also like to see evidence of good team working and of successful completion of National Lottery Heritage Fund funded projects.

- Selection will be based on a Price/Quality Scoring split of 30%/70%.
 - Experience – 30%
 - Approach – 40%
 - Price – 30%
- Panel Interviews
- References
- National Lottery Heritage Fund Sign Off

Please see below for an outline of the evaluation criteria:

Evaluation Criteria	Rating (0-5)	X	Weight	=	Total
Related Project Experience					
a. Qualifications and experience of the proposed team. As detailed on CV's supplied		X	3	=	
2. Proven track record within the last 3 years of managing this kind of heritage and conservation project (with National Lottery Heritage Fund funding) at a similar value to time and budget – list out projects involved in within last 3 years and the role the consultancy played within those projects.		X	3	=	
Proposed Methodology					
a. A full statement on your proposed approach to completing the work, including a methodology. This should set out your approach to ensuring that the work is delivered on time, within budget and to the quality required.		X	5	=	
b. Identification of opportunities, risks or constraints and associated mitigations through the programme proposed and methodology		X	3	=	
Price					
Fixed and Firm Cost with full breakdown of day rate, resource allocation and expenses					
Grand Total					

Price Evaluation

Price will count for 30 marks and will be evaluated on the basis of each Tenderer's tendered prices as set out.

The lowest overall tendered price will score full marks for price.

The marks for price for each other Tender will be calculated by the following formula:

$$\text{Maximum marks for Price} \times \frac{\text{Price of lowest priced Tender}}{\text{Price of Tender being evaluated}}$$

9. Additional Information

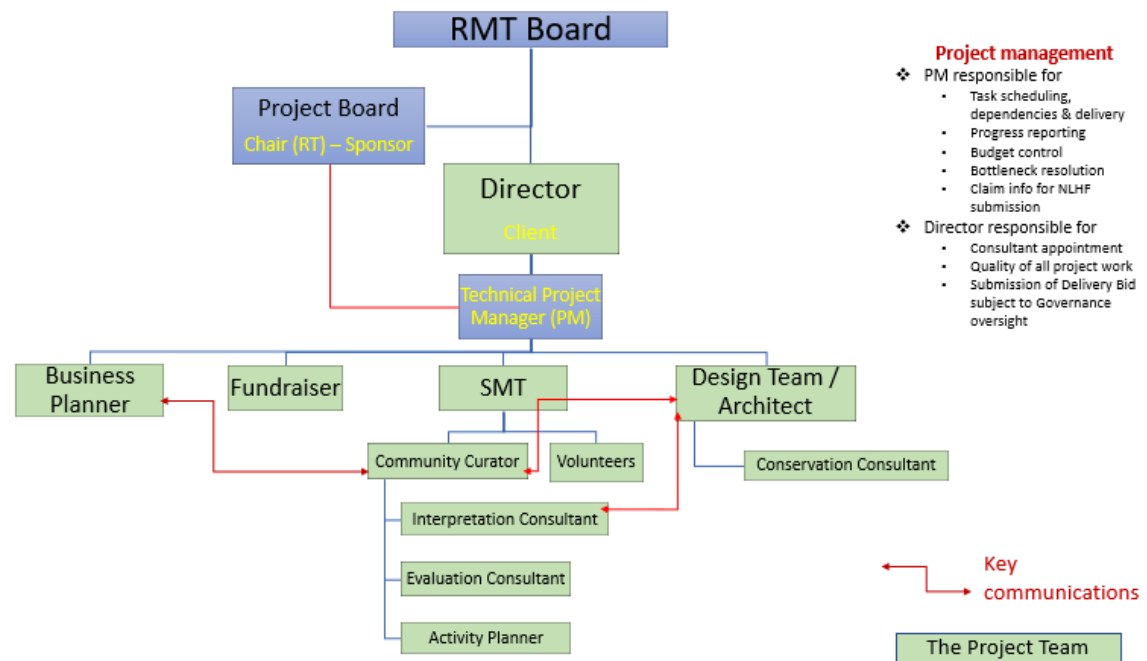
Tenderers must keep their tenders open for 90 days. RMT is committed to procuring goods, works and services locally whenever possible and in an environmentally responsibility manner. We are committed to equality and diversity and will assist tenderers to gain access to the process. We will use guidance from the NLHF for the creation of Briefs and Contracts.

10. Form of appointment

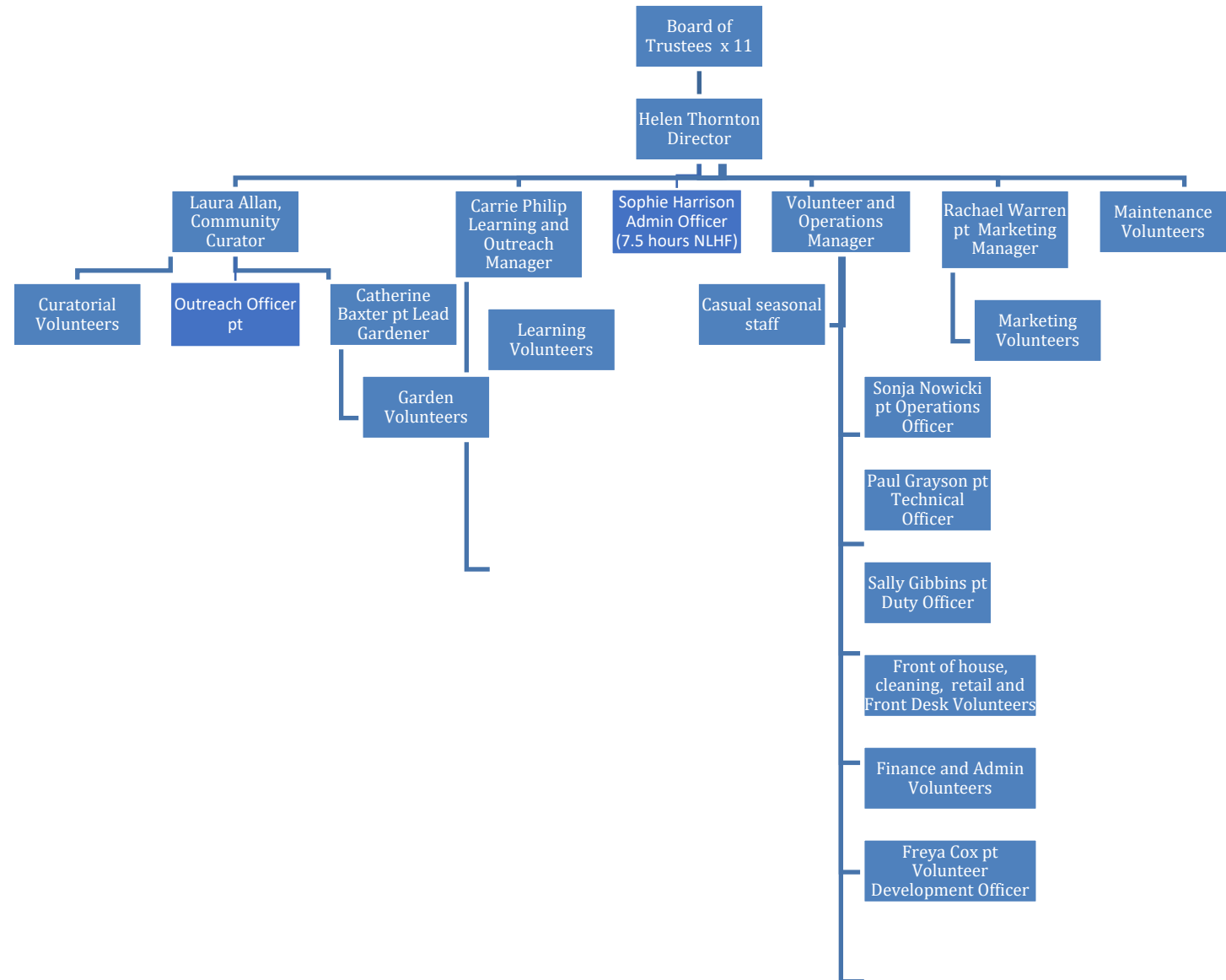
Break clause

11. Appendices

Project organisational chart.
RMT staff organisational chart.
Outline Programme
Outline Condition Survey



APPENDIX G – Key responsibilities of RMT staff July 2021



Key responsibilities

Director ft

- Strategic direction
- Financial and performance management
- External relationships (ACE etc)

Volunteer and Operations Manager ft

- Management and development volunteers
- Visitor Services, access and facilities management
- Environmental Action Plan lead

Learning and Outreach Manager ft

- Learning Programme development
- Developing new approaches to learning including digital
- Manage Learning Volunteers

Community Curator ft

- Community Engagement
- Collections Management
- Manage Curatorial Volunteers

Marketing Manager pt

- Marketing and PR Strategy
- Social media and digital content

Lead Gardener pt

- Develop and manage three historic gardens
- Manage Garden Volunteers

Operations Officer pt

- Front line and administrative operations

- Income development

Volunteer Development Officer pt

- Support for volunteers with additional needs
- Mental Health and Wellbeing for all volunteer teams

Technical Officer pt

- Informational Technology hardware and software support

Learning Officer pt

- Delivery of learning sessions/digital to schools and other learners
- Programme administration

Outreach Officer pt

- Delivery of outreach sessions to community groups
- Community engagement

Duty Officer pt

- Front line customer services and rotas
- Visitor data

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Date: Thu 05/01/23

Task Split Milestone Summary Project Summary Inactive Task Inactive Milestone Inactive Summary Manual Task Duration only Manual Summary Follow-up Manual Summary Start-only Finish-only External Tasks External Milestone Deadline Progress Manual Progress

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**MAIN BLOCK, RIPON
WORKHOUSE MUSEUM -**

OUTLINE CONDITION SURVEY



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I. Introduction

The former Ripon Union Workhouse is situated in the city of Ripon, North Yorkshire at NGR SE 3134 7155, off Allhallowgate. The Ripon Workhouse Museum is located within the former gatehouse block and Main Block, with a workhouse garden in the north-east corner of the site. The main block and the gatehouse are included on the List of Buildings of Special Architectural or Historic Interest as Grade II (refer to Statement of Significance in Appendix B for list entry description).

The Main Block was acquired by the Trust in 2017, with a HLF grant. At the time of the acquisition, the previous owners had not undertaken repairs to the external fabric for a number of years and therefore urgent repairs are now required to safeguard the historic building.

This report summarises the findings of previous condition reports, along with a brief visual inspection of the Main Block, attached kitchen block and Woodshed at the Ripon Workhouse, prepared by Woodhall Planning and Conservation on behalf of the Ripon Museums Trust, in January 2021.

This work was carried out to inform a feasibility study for Site and the preparation of a preliminary cost plan. As a result of this initial work, the scope of the NHLF grant application has been refined.

It should be noted that although the summary of condition includes the Woodshed, this does not form part of the proposed Capital Works. Recommendations for the scope of the repair and restoration work to be included in the NHLF grant are set out in Section 6.

2. Summary of previous reports

In 2007, Woodhall Planning and Conservation prepared a Conservation Management Plan for the Vagrant's Block and external features at Sharow View. At that date the Main Block was in separate ownership and therefore only an outline assessment of the Main Block was included in the report.

In 2011, various reports on the condition of the Main Block were carried out including:

- August 2011 Jacobs Engineering UK Ltd – roof and structure condition survey
- September 2011 Peter Cox Survey of roof timbers
- September 2011 Biker Contracts Ltd – Drainage CCTV survey

In 2014, prior to acquisition, the Trust commissioned a number of reports about the Main Block, including:

- J M Witherick and Associates carried out an Asset Condition Assessment of the Main Block (Sharow View).
- May 2014 – Woodhall Planning and Conservation – Statement of Significance of Sharow View (Main Block) – *refer to Appendix B*

April 2018 – Asbestos Re-inspection Survey by A1 Environmental Services Ltd.

These reports identified that extensive repairs were required to the fabric of the building and in particular:

- Roof: numerous broken and slipped slates, with extensive temporary and unsightly patch repairs to the inner slopes, defective sandstone ridges, defective stone cappings to parapets and verges. Re-roofing with underlay recommended and replacement of all slating battens. Treatment of roof timbers for common furniture beetle
- Brickwork and chimneys: defective mortar pointing. Chimneys leaning and out of plumb and need to be rebuilt
- Settlement of front elevation (*NB remedial works were undertaken to this part of the building prior to acquisition*)
- Defective rooflights in need of replacement
- Defective cast iron rainwater goods in need of replacement
- Repairs to windows
- Asbestos in floor tiles and stair nosings, fuse boards and joints in boiler room pipework

Since their acquisition in 2017, whilst the Trust has addressed some localised issues with water ingress with patch repairs to the lead gutters and roof and repairs to some of the windows, they have been unable to fund the extensive programme of re-roofing and external repairs.

Internally, they arrange for routine inspections of the M&E services. These inspections have highlighted the need to upgrade the services, including the fire alarm and heating system. The existing heating system is very inefficient and the boiler is very expensive to run and the heating engineer has identified that it is in urgent need of replacement.

In line with their environmental policy, the Trust is keen to improve the thermal performance of the building and to minimise their energy use and in particular fossil fuels wherever possible.

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3. Outline Condition – Woodshed

Roof

Slipped slates. Numerous tangles

Parapet - open joints in coping.



East elevation

Some open joints at low level and odd at high level

One eroded brick to replace

Felt over lintol to replace. Check lintol

Rotation of brick on south-east corner

Clear vegetation growing at base of wall

Interior (east end)

Painted concrete floor

Ceiling boarded out between the ties of the trusses

Exposed brickwork painted with applied timber moulding to form a small cornice detail between the ties of the trusses

Electric heating and exposed painted conduits

Store 1

Ceiling underdrawn with plastic

Purlin spans East/west

Brickwork painted with paint flaking off in areas

Embedded horizontal timber at eaves level which has been limewashed on West wall

Exposed concrete floor limited access due to stored items

Store 2

Exposed rafters and purlins roof

Six rafters. slates with the remnants of some torching visible

Walls limewashed in a light yellow/brown colour and an exposed brick floor

Extensive efflorescence around window on south wall

Workshop

Inserted suspended ceiling with hatch in the centre

Chimney breast on South wall

generally limited inspection due to all of the stored material

Timber boarded floor exposed

Walls are painted evidence of cracking particularly on the east wall where timber is stored on brackets built into the wall

Paint flaking to expose red ochre below

High level vent in west wall

Vertical boarded timber doors in north wall. Flight holes in door and frame

Window with Perspex sheet over. Cill decayed internally. 1 broken pane

1 incorrect pane

North elevation

Blocked opening to store adjacent learning room - assume metal plate lintol.

Some corrosion evident and rust jacking in bed joints

Mortices and scar on brick, provide evidence of previous leanto structure

Louvred vent to learning room (roof void)

Some eroded bricks and open joints in 5 courses band approx 8 courses above ground level plus 4 bricks to piece in

Scar where yard wall taken down and straight joint

Slipped slates on hip to workshop

West elevation

Moss on slates and open joints in ridge tiles

Some open joints

Cracking at southern end and where yard wall taken down

South elevation - workshop

Cracking at east end

2 pintles from gate extant

Eroded bricks to replace and piece in at base

Rake out and repoint all

Reslate hip - numerous slipped and damaged slates

Raking cracking at east end - spreading?

East elevation - workshop

Numerous open joints

South elevation

Open joints at low level

Open joints to east of store 1 window

4. Outline Condition – Main Block

Exterior

General

Roof and high level masonry in poor condition. Water ingress through valley gutters. Eroded stone ridges. Moss on slates and verges. Slipped and damaged slates. Vegetation and open joints in copings. Eroded coping stones



Rainwater goods in poor condition

Extensive use of hard cement mortar, including cement render patch repairs in several locations.

Extensive soiling/blackening of stone dressings

Decay in timber window cills. Repairs and redecoration required to external doors and windows

Double gable to east:

Open joints and vegetation around valley gutter. Unusual projecting hopper detail but no apparent overflow provided

Extensive repointing required - open joints and hard cement mortar

Some eroded bricks to replace

First floor window - cill paintwork very poor. Decay in cill and base of frames and casements

Rainwater goods generally corroded - replace

Open joints in concrete flag margin and some re-levelling required

Master's House - East elevation

Decay in 3no. first floor windows

New cills required to 2no. ground floor windows

Eroded and open mortar joints in lower courses (GF cill and below)

South elevation

East extension – GF and FF windows decayed

Male east wing - repair 4no. FF windows. Rake out and repoint Nb crack at east end of elevation

Master's House - Cills to 3no. FF windows & 2no. GF windows decayed. Vegetation growing in stonework around entrance

Female wing - 3no. FF window cills decayed



Interior

Central block -Head of stair inner bead decayed. Plaster below poor. Ceiling cracked

Internal rainwater pipe

Woodchip on walls.

Stone steps with vinyl over (asbestos content).

Generally, modern (inserted) ceilings at first floor level

Cracks at high level to south of east stair (FF in Master's House)

Cracks and water penetration evident along FF corridor in east wing (below valley gutter)

Modern doors generally – some fire doors do not close properly

Fragment of historic wallpaper at FF level in SE corner of west wing

Poor acoustic separation between ground and first floors

Water ingress through windows

First floor areas generally in need of refurbishment and redecoration





Sun Room

Modern lightweight structure with mineral felt covered flat roof, timber cladding and large single glazed windows.

Designed as a covered link corridor between the Main Block and Infirmary it has very poor thermal performance.

The windows have low cill heights and the glazing is not safety glass and due to the large size, there is some flex in the glazing

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5. Outline Condition – Kitchen Block

Roof: uneven ridge and slopes, with defection evident between trusses. Eroded bedding below ridges. Moss between slates. Slipped and damaged slates. Open joints and vegetation in copings. Eroded copings. 2no. glass slates on east elevation to be retained
Timber ridge ventilator decayed



Hard cement mortar, with open and eroded joints and bricks
Efflorescence on chimney breast
Rainwater goods in very poor condition



Decay in timber windows
If basement to be used, restore lightwells to 5no. basement windows and provide 5no. new timber windows. Provide drainage at base with metal grilles over lightwells. Internally, allow

for opening up floor in the area of the basement stair and for reinstating stone steps to basement, with lockable floor hatch over.

If boiler house to be relocated, remove low level vent and infill opening with brickwork.

Replace high level vent with new 2-light timber framed double glazed casement.

Remove climber and trellis on east elevation and point up voids where removed

Issues with water ingress to interior, around chimney

Damage to quarry tile floor



6. Recommendations for Capital Works to be included in NHLF application

External

- Allow for re-roofing Main Block, Kitchen block, sorting and salvaging slates for re-use. Allow say 50% replacement slates and ridges. Provide insulation, breathable membrane and new rainwater goods (cast iron gutters, downpipes and hoppers). New lead valleys including timber decking to gutter, lead flashings etc
- Lift and rebed stone verges allowing for 10% replacement.
- Check condition of stone finials to south gables. Provide new stainless steel insect mesh to louvred openings in gables and ventilators
- Chimneys - repoint stacks 100%. Check chimney pots and replace mortar haunchings
- Repair and redecorate all external joinery (windows, doors, fascias, barge boards, ventilators etc)
- Redecorate metal grilles, rainwater goods and hoppers, soil vent pipes
- Remove redundant fixtures and fittings
- Consider light/gentle cleaning of stone dressings
- Allow for some replacement of eroded stone dressings
- Remove vegetation growing at base of all buildings
- Assume 100% rake out and repoint with lime mortar to all elevations
- Allow for removing cementitious mortar infill and cutting out eroded bricks and for piecing in approx. 200no. bricks in various areas – where mortar infill or eroded bricks removed
- Replace ironmongery to all external doors and provide new suited locks. Allow for repairs to doors – splice repairs to base of door frames etc
- Provide new insulated flat roof covering and rainwater goods, insulated timber cladding and new timber framed double glazed windows to the Sun Room
- Improve access to first floor with construction of extension to accommodate lift

Internal

- Take down modern suspended ceilings above former dormitories (FF West Wing). Allow for repairs to lath and plaster ceiling above. Allow for joinery repairs to roof trusses.
- Allow for repairs to cracks in FF ceilings in various locations
- Allow for upgrading the acoustic separation between ground and first floor areas
- Remove inserted partitions and ceilings to suit restored spaces
- Allow for some plaster repairs to walls
- Provide metal framed secondary glazing set in timber sub frames
- Allow for redecoration or touching up of decorations to main visitor areas.
- Removal of asbestos floor tiles, stair nosings etc and provision of new floor coverings,
- Quarry tile floor in kitchen and scullery and parquet floors in master's quarters to be retained and made good where later partitions removed
- Allow for removal of asphalt covering in GF room to north of east stair (*former Grocery Store/Pantry*)– problem with water rising and ponding on floor. Investigate and allow for new concrete floor with quarry tile finish?
- Review passive fire protection and upgrade as necessary, including fire doors, means of escape and service penetrations
- Dispose of existing gas boilers and allow for new ground source or air source heat pump, with plant located in cellar below kitchen block

- New M&E installations throughout Main Block (including kitchen block and sun room), to suit new heat pump. Heating and security systems to be zoned. New fire alarm system, security system, Cat 6 data infrastructure.
- Relocate meters and consumers units from GF room to Store /cellar (below kitchen block)

External Works

- Master's Garden: take down brick pier at south end of existing east wall, reclaiming bricks for re-use. Extend wall southwards, detail to match existing and with new stone capping. New brick walls as shown on plan (assume 1.8m high, including stone capping). Allow for raking out and repointing retained section of wall in lime mortar

Appendix A – Reference Plans (existing and proposed)

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