



## CATHEDRAL CONSERVATION MANAGEMENT PLAN BRIEF

**Role:** Production of a Cathedral Conservation Management Plan (CCMP) which sets out the significance of the place and how this should be retained, and if possible enhanced, in any future use, alteration, repair or management.

**Location:** Home or company based; ability to travel to Bury St Edmunds for meetings and workshops

**Reporting to:** Project Manager

**Time frame for work:** October 24 – May 2025

### Executive Summary

1. Thanks to National Lottery players, St Edmundsbury Cathedral (the Cathedral) has received a Development Phase grant from the National Lottery Heritage Fund (Heritage Fund) in support of the project *The Abbey of St Edmund: A Millennium of English History in West Suffolk* (the Project).
2. The Cathedral is the lead partner, working with project partner English Heritage and project partner West Suffolk Council (the Council) to develop and deliver the Project. The ruins of the Abbey are within the guardianship of English Heritage. The Council owns and maintains the grounds of the Abbey Gardens site where the Abbey is situated. The Cathedral site, where a visitor centre will be situated, is within the wider Abbey area and is an important physical link between the Abbey and the Town.
3. St Edmundsbury Cathedral, West Suffolk Council and English Heritage (the Project partners) have come together as members of The Abbey of St Edmund Heritage Partnership (comprising 29 organisations and individuals who care about the Abbey) to develop and deliver the Project.
4. The Project Board (a sub-committee of the Chapter of St Edmundsbury, and which is independently chaired and comprises representatives of the Cathedral, English Heritage, West Suffolk Council and The Abbey of St Edmund Heritage Partnership) is responsible for the oversight and management of the Project, and for ensuring that the terms of the Heritage Fund grant agreement (especially its agreed purposes) are followed.
5. As part of the Development Phase, which runs from June 2024 to February 2026, the Project Board wishes to appoint an Conservation Specialist to produce a Cathedral Conservation Management Plan (CCMP) which sets out the significance of the place

and how this should be retained, and if possible enhanced, in any future use, alteration, repair or management.

6. The appointed consultant will be required to work closely with the Cathedral Architect and the Cathedral Archaeologist, as well as the Project's Lead Consultant, Archaeology Consultant and Project Manager.
7. To note that the Project Board might need to ask the successful bidder to update the CCMP in the delivery phase of the Project, should anything new be discovered during the development phase.

### **About the Project**

8. The Project will deliver urgent conservation of the highly vulnerable Abbey remains. It will open up access to the site through improved and expanded footpaths through gateways between the Cathedral site and the Abbey site. There will be a visitor centre, in reused and extended existing cathedral buildings, which face the town's main public square, and in which there will be a 120 sqm dedicated interpretation room. The visitor centre will also include an orientation area, tourist information and tour guide gathering point, a shop and toilets.
9. The Cathedral Conservation Plan is made possible through this Project, although – exceptionally in all the externally commissioned pieces of work – its principal focus will be on the Cathedral site, albeit within the wider context of its position (and historical role) within the wider Abbey site.
10. Further information is available on the website [stedscathedral.org/abbey-st-edmund](https://stedscathedral.org/abbey-st-edmund)

### **The Commission**

#### **Aim**

11. Produce a clear, accurate, well illustrated, well researched, well signposted and intelligible Cathedral Conservation Management Plan (CCMP) which sets out the significance of the place and how this should be retained and if possible enhanced in any future use, alteration, repair or management. A key element of the CCMP will be its relationship with the Abbey of St Edmund, which is the focus of the Project and for which the Cathedral is the lead partner.

#### **Objectives**

12. The CCMP is needed to help the Cathedral:
  - a. Understand the cathedral building and site and its use by the community (by drawing together information including documents and physical evidence in order to present an overall description of the place through time. This

includes a brief description of the Cathedral and Site today, how it is used and perceived, and identifies areas for further research).

- b. Assess its significance (both generally and for its principal components, on a local, national and international level).
- c. Identify potential and constraints (by identifying issues affecting the significance of the site and building remains, or which have the potential to affect them in the future).
- d. Assist in applications for permissions and grants.
- e. Develop management policies (to ensure that the significance of the Cathedral and Site is retained in any future management, use or alteration - if possible this significance should be enhanced through implementation of these policies).

#### Outputs/Deliverables:

13. Preliminaries and Introduction - list of illustrations, executive summary, purpose of the CCMP and its relationship to other key documents, process by which the CCMP has been compiled.
14. Understanding the place and community - location and setting, Cathedral and community, history and archaeology of the buildings and cathedral site, the cathedral and site today.
15. Assessment of significance - articulating the various levels, a summary of the formal designations, a detailed breakdown of what is of significance.
16. Defining potential and constraints - issues affecting the Cathedral, its context and contents; an exploration of potential areas of conflict; impact assessment.
17. Conservation and management policies - these will have been identified during the process of preparing the CCMP, they should be general to the place as a whole and specific to particular areas, include guidelines relating to how the value of particular parts or aspects should be retained or enhanced.
18. Sources.
19. Appendices – depending on available material.

#### Tender Requirements

20. The tender should be no more than 8 pages and include the following:
  - a. proposed methodology and timescales;
  - b. details of comparable experience, especially for Heritage Fund-funded projects;
  - c. a fixed-price quote, explaining daily rates and VAT (if applicable), and any additional costs which would be charged in addition to the quote (for example, travel to Bury St Edmunds);
  - d. confirmation that the consultant/agency has the capacity to complete the work within the brief and to the agreed timescale;

- e. three references.
21. We are seeking the consultancy which will deliver a high quality CCMP for the most cost effective fee.

**Timescale**

22. We would like our consultant to start by October 2024 and have the completed all the outputs/deliverables by May 2025.

**Tender evaluation / weighting**

23. Selection of the successful consultancy/agency will be based on:
- a. Proven experience of similar work at an equivalent level of complexity and significance, and demonstrable success at that level (25%) – please note this will represent the first sift and tenderers not meeting this requirement will not progress further;
  - b. understanding of the brief, assessment of key issues and how objectives will be met (40%);
  - c. methodology (15%);
  - d. value for money/tender price (20%).

**Scoring System**

24. Parts a to c in para 22 above will be assessed using the scoring mechanism below.

<b>Score</b>	<b>Meaning</b>
0 Point	Failed – to respond to the brief correctly.
1 Point	Poor – Insufficient information and evidence provided to demonstrate that the tenderer has the ability, understanding, experience, skills, and resource required to provide the consultancy services.
2 Points	Acceptable - Response demonstrates some lack of understanding of requirement or evidence of ability to deliver; low risk that relevant resources will not be available.
3 Points	Good – Response provides clear evidence that resources and/or relevant experience are available and provides confidence that relevant ability, understanding, experience, skills, resource and quality assurance measures are available.
4 Points	Excellent – Above average response giving real confidence that the tenderer will provide excellent resources with relevant experience. Response identifies factors that will offer potential added value and provides supporting evidence.
5 Points	Outstanding - Exceptional demonstration by the tenderer of the relevant ability, understanding, experience, skills, resource and quality assurance measures required

to provide the consultancy services. Response identifies factors that will offer potential added value and provides detailed supporting evidence.
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25. Part d in para 22 above will be scored with the lowest bid scoring 5 (maximum score). The Project Board are not required to appoint the cheapest bid but needs to include price within the evaluation to ensure a robust process and evidence of pursuing value for money through procurement. The Project Board will not cover costs associated with preparation of tender materials.
26. Clarification interviews might be held, or the Project Board might decide to appoint on the basis of the submissions alone.

### **Budget**

27. There is an indicative budget for this work of £20,000 including expenses, but excluding VAT.

### **Available Documentation**

28. Available on our website are:
  - a. a summary of the Heritage Fund Development Stage application;
  - b. the RIBA 1 Report;
  - c. the 2018 Abbey of St Edmund Conservation Plan;
  - d. the 2018 Abbey of St Edmund Heritage Assessment.
29. More detail about what we will expect to see in the CCMP is contained in Appendix One, a short document produced early this year by the Cathedral Architect and the Cathedral Archaeologist.

### **Management of the commission**

30. Day to day management of the commission rests with the Project Manager.
31. Accountability will be to the Project Board and Chapter.

### **Submission**

32. The closing date for submission is 12 noon on Friday 13 September 2024.
33. The principal contact for the tender process will be Sarah-Jane Allison, Chief Operating Officer at St Edmundsbury Cathedral [Sarah-JaneAllison@stedscathedral.org](mailto:Sarah-JaneAllison@stedscathedral.org)
34. Tenders must be marked 'The Abbey of St Edmund: A Millennium of English History in West Suffolk – Cathedral Conservation Management Plan Tender.'
35. Short-listed candidates may be invited to attend an interview process.

## ST EDMUNDSBURY CATHEDRAL: OUTLINE FOR CONSERVATION MANAGEMENT PLAN

### 1. Preliminaries

1.1 Statement that the Chapter has formally adopted the CMP and is committed to using it. To include a message from the Chapter regarding its vision for the future of the Cathedral and how the CMP relates to this.

1.2 Executive summary of the key points in the CMP.

### 2. Introduction

2.1 Authorship of the CMP, date, reason, purpose. To set out the status of the CMP and its relationship to other key documents eg the log book, inventory, quinquennial inspection reports. To outline the process by which the plan has been compiled, including a summary of consultees and participants, and a summary of the main sources, cross referenced to the bibliography and appendices as appropriate.

### 3. Understanding the place and community

3.1 Provide the basic information needed for the discussion of values and significance which follows. To include: The location and setting of the Cathedral; a brief summary which sets the Cathedral within its spatial, environmental, social, archaeological and historical context, serving as an introduction to what follows.

3.2 The Cathedral and the community: explains the primary mission and role of the Cathedral and the various activities which take place within it, including mission and worship, community uses, outreach, education, music, maintenance, visitors and visitor management. This information focuses on how people interact, and interacted in the past, with the Cathedral; the human dimension(s) of the place.

3.3 Description of the building(s) and site This can be divided into two parts:

- The history and archaeology of the building(s) and site: provide an overview of the broad phases of change affecting the place, including its immediate environment, from the earliest archaeological remains and/or historical records through to the present, including previous use of the site and the various rebuilding and restoration campaigns which have affected the Cathedral and site. It will include a brief timeline as an introduction, with photographs, maps, prints and paintings judiciously used to illustrate this development. In many cases it may be felt appropriate to confine most of the detail to one or more appendices, offering a very brief summary within the CMP itself.
- The Cathedral and Site today: a concise description of the entire Cathedral complex as it can be seen today, covering the Cathedral church, the precinct and associated structures and monuments, illustrated with photographs, maps, and plans. It includes an overview of the Cathedral's fixtures and fittings, collections and library. Where there is a large amount of detailed information, this will be summarised in appendices, and/or reference can be made to other documents.

### 4. Assessment of significance

4.1 An understanding of significance is the whole basis of the process and should influence everything else. This means that practical decisions take as their starting point the values of the place. In a Cathedral there are likely to be real conflicts between different values or types of significance; part of the skill of managing a Cathedral lies in reconciling such conflicts. The more explicitly values are articulated, the easier it is to recognise – and reconcile – potential conflicts. The first step involves articulating the various levels of significance of the Cathedral and precinct. Significance is essentially a hierarchical concept, using ascending levels of value. These follow guidelines established by James

Kerr (The Conservation Plan, 1996 and 2000 editions) and adopted by the Heritage Lottery Fund, Historic England and others. The levels of significance are:

- Exceptional – important at national to international levels.
- Considerable – important at regional level or sometimes higher.
- Some - of regional significance for group or other value (eg a vernacular architectural feature).
- Local - of local value.
- Negative or intrusive features, ie those which actually detract from the value of a site. A lower designation of significance does not imply that a feature is expendable. Furthermore there are many instances where parts or aspects of the place may be susceptible to enhancement or reduction of significance as currently perceived, especially where there is a lack of information or understanding at the moment.

The Assessment of Significance can then be organised in the following way:

- A summary of the formal designations (Listed Historic Buildings, Scheduled Ancient Monuments, Conservation Area, Site of Special Scientific Interest, Tree Preservation Orders, &c) and what these designations indicate about significance;
- A detailed breakdown of what is of significance, on either a spatial, typological or chronological basis (or a combination of these), relating significance to the physical reality of fabric, contents, landscape, archaeology &c in a systematic way. This will include the significance of such things as liturgical use and developments, musical tradition, community and amenity value, &c.

## 5. Assessment of potential and constraints

5.1 There may be factors and issues which need addressing which affect, or have the potential to affect, the significance articulated in the previous section. Examples might be radical reordering proposals, new regulations on access for people with disabilities, or on energy conservation. Furthermore, a lack of resources (or the allocation of resources) may be affecting some of the ways in which the place is significant. This section sets out a consideration of all the issues impacting, adversely or otherwise, on what has been established (in the previous section) as being significant about the Cathedral. It includes:

- Issues affecting the Cathedral, its context and contents: this is an analysis of those specific ways in which the significance of the place is vulnerable, identifying issues that are current now, that have had an impact in the past, and that are likely to have an impact in the future. These might include structural problems, lack of resources, patterns of worship, or new legal requirements. It will also explore where there might be potential for enhancing the Cathedral and its significance.
- An exploration of potential areas of conflict: these are likely to arise from perceived conflicts of values. This might arise, for example, from a desire to create flexible space within the Cathedral, or to enhance the significance of the musical tradition by installing new organs or moving or extending older ones which clash with the significance of the existing instruments themselves, or with an affected area of historic fabric, floor or important sight line. The requirements of recent legislation and policy regarding environmental sustainability and access for the disabled in particular may clash with aesthetic and heritage issues.
- Impact assessment: this is something that most decision-makers do implicitly when considering significant changes arising from these considerations. In making a decision – for example about the location of new visitor facilities or the installation of new services – they will ask ‘what will be the impact of the work on the special interest of the place as a whole, and of that particular part of it affected’? The benefit of articulating this in the CMP is that others can share and appreciate your thinking, which helps inform the process. This section will be amongst the most frequently updated parts of the CMP.

## 6. Management policies

6.1 This section sets out the policies that have, during the process of preparing the CMP, been identified as necessary for retaining and enhancing the significance of the Cathedral taking the constraints into account. These policies will have been fully evaluated with those responsible for the management of the Cathedral. Policies should be both general to the place as a whole, and also specific to particular areas. There may be general (not day-to-day) policies on, for example, use, maintenance, repair, access, new services, health and safety, community consultation, planning, archaeology, ecology, new work or visitor management. There may also be specific guidelines relating to how the value of particular parts or aspects should be retained or enhanced. If such are not in place, specific policies should be established to establish a Disaster Management Plan, a Disability Audit, and Sustainable Management policies, taking advice from the FAC and from the CFCE. The first and perhaps most important policy should be to create a mechanism for a Review Procedure of the CMP itself. Our knowledge of places like Cathedrals is constantly increasing. The CMP will provide a framework for managing information, to which new information can be added as it arises. An obvious solution is to embed the Review Procedure into the Quinquennial Review process, to ensure that the document continuously evolves and remains accurate and useful, but the CMP should also be reviewed after every significant change, repair, or study. This can make the difference between a useful document and one consigned to gather dust on the bookshelf.

## 7. Sources:

This will provide details of the main texts, collections and institutions where the relevant information and material referred to or supporting the CMP can be found.

## 8. Appendices

The Cathedral is of such scale and complexity that the mass of information existing can only be summarised in the CMP.

In order to keep the CMP a reasonable length and a concise and useful document, this mass of detailed information should be organised in appendices, to which the CMP makes reference, or it may be felt appropriate to simply give references in the sources section to this material rather than append it to the CMP as an appendix. Scholarly discussions about various aspects and suggested areas for future research may also be placed in appendices. In these ways, it should be possible to avoid the CMP expanding and becoming unmanageable, expensive and poten