Period of contract: Development and Delivery Phase - RIBA 2 to RIBA 7.

Invitation to Tender (ITT)
for
St Osyth Priory & Parish Trust
Multi-Disciplinary Design Team

Submission of Tenders: 3rd July 2025

Any queries relating to this tender should be submitted via the
St Osyth Priory & Parish Trust email - **tenders@stosythpriorytrust.org.uk**

Issue date: 5th June 2025

Made possible with Heritage Fund

Appendices

1.0 PROJECT OVERVIEW AND CONTEXT

1.1 INTRODUCTION

St Osyth Priory & Parish Trust is currently in the development phase of a National Lottery Heritage Fund grant which will focus on the redevelopment of the Tithe Barn and Old Dairy and into hireable event and community spaces.

St Osyth Priory and Parish Trust wishes to appoint a suitably qualified and highly experienced Multi-Disciplinary Design Team to work on the Development and Delivery Phases - RIBA 2 to RIBA 7 of this aspect of the project.

This ITT sets out the background to the project, the tender process, timescales, and management arrangements.

There is, however, no guarantee that Delivery Phase services will be required, and bidders should take account of this.

1.2 BACKGROUND INFORMATION

St Osyth Abbey (originally and still commonly known as St Osyth Priory) was a house of Augustinian canons in the parish of St Osyth (then named Chich) in Essex, England in use from the 12th to 16th centuries. Prior to the Reformation, it was the third wealthiest abbey in the country. After falling into private ownership by the Darcy family following the reformation, the abbey was severely damaged in the English Civil War, and the house and 6,800-acre estate was owned privately throughout its history.

The house was requisitioned during the Second World War and then sold in 1948 to the Loyal and Ancient Order of Shepherds who founded a convalescent home here. Five parts of the priory are Grade I listed buildings. In 1954 Mr Somerset de Chair, a popular novelist and MP, purchased the property, allowing the convalescent home to remain in the main building for many years (closed 1980), and converting the Gatehouse into a separate residence. De Chair developed the gardens and opened the property to the public. He also gradually sold off parts of the estate and allowed large scale gravel extraction to disfigure much of the surrounding landscape. After his marriage in 1974 to Lady Juliet Wentworth Fitzwilliam, the Wentworth Woodhouse art collection, which she had inherited, was displayed here. On de Chair's death in 1995 the property was put up for sale by his widow, and it was eventually purchased by the present owners, the Sargeant family, in 1999. It is part of the Historic Houses Association but is privately owned by the Sargeant family.

The site is used for events, open for walking tours, and there is an education and training centre.

St Osyth Priory & Parish Trust is an exceptional collection of heritage assets comprising 16 separate Grade I, II* and II listed buildings set within a Grade II registered historic park and garden. The vision for this mesmerising collection of buildings and landscape, is to fully revitalise and restore the historic assets to their former glory. By utilising many different options, the estate will have a new long term and viable future that engages with the community and brings new economic prosperity to the local area. The vision is that the Tithe Barn and Old Dairy buildings will deliver a wedding and venue that can be leased and potentially run by a private operator - with the buildings used by the community to meet the Trusts charitable purposes when not rented out commercially.

Planning Permission and Listed Building Consent has been granted via a previous planning application:
You can find information using these application numbers: 14/01008/FUL and 14.02009/LBC

1.3 PROGRAMME TIMELINE

Below is an approximate timeline of the programme:

RIBA Stage 2 – July 2025 – December 2025

1. Pre-planning Application Submitted – September 2025 to November 2025
2. Ongoing SOPPT Meetings

RIBA Stage 3 – December 2025 – August 2026

1. Coordinated Designs & costs Approved – May 2026
2. Match Funding for Delivery Phased secured and in place, agreements in place - May 2026 to August 2026
3. Planning/LBC Applications – April 2026 – May 2026
4. Delivery Phase Application Prepared – June 2026 – July 2026
5. Delivery Phase Application Submitted - August 2026
6. Planning/LBC Decision – TBC
7. Ongoing SOPPT Meetings

End of Development Phase

RIBA Stage 4 – January 2027 to June 2027

1. Decision on Delivery Phase Application – December 2026 (TBC)
2. Estimated Permission to Start Received (Delivery Phase) – January 2027
3. Discharge Pre-Commencement Planning/LBC conditions – February 2027 to May 2027
4. Ongoing SOPPT Meetings

RIBA Stage 5 – November 2027 to January 2029

1. Construction - December 2027 to October 2028
2. Fit out and interpretation installation period – November 2028 to January 2029
3. Ongoing SOPPT Meetings

RIBA Stage 6 Handover of sites & testing for close out – January 2029 – March 2029

1. Ongoing SOPPT Meetings

RIBA Stage 7 In use and open for Autumn - March 2029 – May 2029

1. Ongoing SOPPT Meetings
2. Project Evaluation Submitted - March 2029 to May 2029
3. Activity period and programme ends – May 2029

1.4 PROJECT TEAM

SOPPT will also be procuring or have procured the following Consultants to comprise the Project Team:

- Project Manager
- Quantity Surveyor
- Multi-Disciplinary Design Team
- Activity Plan, Community Consultation and Co-Production Consultant
- Business Planner
- Evaluation, Economic and Social impact Consultant
- Fundraising Consultant
- Others as required

1.5 CONSTRUCTION VALUE

The current anticipated construction value is £2.908 million excluding VAT, inflation, contingency and fees.

1.6 APPOINTMENT

The following forms of contract will be used:

- RIBA Standard Professional Services Contract 2020 Architectural Design
- RIBA Principal Designer Professional Services Contract 2020

If you have any comments on this, please include these as part of the clarifications.

2.0 REQUIRED SERVICES

2.1 REQUIRED SERVICES BROKEN DOWN

2.1.1 The tender documents include the following appendices that set out the base information needed to understand St Osyth Priory & Parish Trust's requirements.

2.1.2 The following briefs are outlined below:

2.2 Architect, Lead Designer and Conservation Advisor
2.3 Principal Designer
2.4 Contract Administrator
2.5 Structural Engineer
2.6 Mechanical and Electrical Engineer
2.7 Lighting Designer
2.8 Accessibility Consultant
2.9 Fire Engineer
2.10 Specialist Consultants
2.11 Management and Maintenance Plan
2.12 Conservation Management Plan

2.1.3 These briefs provide a high-level summary of the role, scope and responsibilities expected for each role. Please find a schedule of services in section 2.7

2.2 ARCHITECT AND LEAD DESIGNER

2.2.1 Role, Scope, and Responsibilities

The Architect and Lead Designer will be required to work with the Project Manager and Cost Consultant (QS) towards the development and successful completion of the Delivery Phase Application in August 2026.

The National Lottery Heritage Fund Delivery Phase application shall be to RIBA 3 level. This will include drawing contributions from the Architect as Lead Designer, structural engineer, mechanical and electrical Consultant(s) plus any specialist surveyors or similar not identified in this report but considered necessary to deliver a successful outcome. The technical design will be undertaken as part of RIBA 4, but a task at risk for the work will need to be carried out prior to the permission to start for the delivery phase.

The Architect will work with the Trust and other Consultants to detail the design of any new build on the site as well as any alterations to the current buildings, new structures, interior spaces, and areas of hard and soft landscaping including access roads.

The Architect will ensure that the services he or she offers are to be provided in accordance with the latest RIBA guidelines.

The final design will support the vision of the St Osyth Priory & Parish Trust, and its wider project aims, including aspirations for sustainability. Completed designs will meet best practice standards and shall be fully compliant with all relevant statutory regulations and requirements.

Scope and responsibilities:

- Act as Lead Designer for the project.
- Provide input into project development and delivery planning, programming future works and exploring procurement and contract management options.
- Have experience of working with Heritage Buildings.
- Oversee all Planning, Listed Building and Building Regulations requirements.
- Oversee Contractor procurement for the Capital Works Phase

2.2.2 Duties of The Lead Designer

General

- The Supplier will be required to undertake the following Lead Designer Services from within his team.
- In the following duties reference to 'Consultants' or 'Consultant Disciplines' shall include all the Disciplines other than the Project Manager who have been appointed for the Project by the Client.
- The Lead Designer will undertake his duties under the general direction of the Project Manager.
- The Lead Designer's primary duty will be to lead the team of other Consultant Disciplines and to ensure satisfactory co-ordination of their designs, recommendations, and reports and, where required in the following duties and at other times necessary to ensure the satisfactory outcome of the project communicate these matters to the Project Manager. This will include coordination of the designs with the Interpretation Design which is appointed as a separate Contract.
- Where in the following duties, the Lead Designer is required to advise or assist the Project Manager in any way, then such advice or assistance shall include the coordinated advice or assistance obtained from other Consultant Disciplines.
- The duties of the Lead Designer as set out in this Schedule are not exhaustive and may, from time to time, be supplemented by other reasonable instructions and requests.
- It is the Supplier's responsibility to integrate the duties of the Lead Designer with those of the Architect or other potential design leaders from the appointed Design Team.
- The Lead Designer, Client and his/her representatives, other Consultants and all stakeholders will work closely together to foster a partnering culture. The culture will embody the principles of mutual trust and co-operation with an overall aim of delivering a successful project on time and to budget.
- Perform the Services necessary for completion of the works in line with the project programme.
- Give to the Client reasonable prior notice of and invite the Client to attend all meetings called by the Consultant in relation to the Project; attend all meetings called by the Client, the Project Manager and the Other Consultants in relation to the Project as appropriate/ reasonable.
- Keep full and proper records of all key meetings and negotiations attended or conducted by the Consultant and make the same available for inspection by the Client forthwith on request.
- Deliver the Project in line with the Project Execution Plan (PEP) and report progress against the PEP baseline throughout.
- Perform such other duties as may reasonably be required by the Client to secure the completion of the Project.
- Present proposals to funders e.g. Heritage Fund on behalf of the wider Design Team as required at the end of each RIBA stage.
- Support the Client in preparing funding applications in relation to their area of work The Consultant shall issue monthly project progress reports detailing the project status under the following headings:
  - Works Undertaken
  - Forthcoming Actions
  - Information / Decisions / Key Actions Required
  - Cost report

  - Risk Issues
  - Issued Information / Design Status.
- Ensure all work, files, important documents and full records are maintained and kept securely and are up to date and ready to hand over to the Client at any time.
- Participate in evaluation at the end of each RIBA Stage.
- Comply with the CDM Regulations and the Building Safety Act 2022 insofar as they relate to this Appointment.
- The Consultant shall, if requested to do so, assist the Client in respect of any claims or proceedings made in relation to any of the Other Consultants or the Contractors.
- Obtain the Project Manager's approval to proceed to the next RIBA Stage.

RIBA Stages 2 - Concept Design

- Receive the Client's initial brief from the Project Manager and provide such assistance as is necessary to identify possible options and expenditure limits. Undertake an initial appraisal of the site and constraints to inform the design of the scheme.
- Carry out a conditions survey and produce a report/update existing report as required to inform the brief.
- In consultation with the Project Manager and Design Team, advise on any necessary surveys / opening up works to be undertaken, prepare the briefs, review quotes / tenders and assist the Project Manager as required with procurement of these surveys / opening up works.
- Obtain the Client's final design brief from the Project Manager which includes a detailed programme for completion of the Project and an agreed cost limit.
- Communicate the details of the agreed design brief to all Consultant Disciplines and exercise all reasonable skill, care, and diligence to ensure that each Discipline confirms in writing their commitment to that brief. If this highlights the possibility of difficulty in implementing the brief, inform the Project Manager and take the necessary action to ensure that the difficulties are resolved.
- Liaise with the quantity surveyor and provide information as necessary on the developing design to ensure the quantity surveyor is able to prepare detailed costings appropriate to the level of design information.
- In co-operation with the Consultant Disciplines prepare a detailed programme for the production of design information leading up to obtaining tenders for the Works and obtain the Consultants' commitment to that programme in writing and provide a copy of the programme to the Project Manager.
- Assist the Project Manager to establish rigorous cost control procedures so that designs are strictly monitored against the agreed cost plan and that any difficulties are rectified, and the approved cost limit is maintained
- Coordinate the development of the Architectural concept design with inputs from structural, MEP, and other Consultants.
- Establish rigorous management procedures to monitor the production of design information produced by Consultants so that any shortcomings are immediately highlighted and rectified.
- Establish and chair regular meetings with the Consultant Disciplines and others to monitor progress and to take any action necessary to correct any deficiencies in design information. Circulate minutes of the meetings to the 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.
- Accept responsibility for ensuring that the exchange of design or other information between the Consultant Disciplines is satisfactory throughout the course of the Project.

- Establish regular reporting procedures with the Project Manager, identifying those matters which require approval and where necessary, provide assistance to obtain those approvals.
- In conjunction with the other Consultant Disciplines, make recommendations to the Project Manager on the need for specialist design Consultants outside of the Supplier's Core Service Disciplines.
- In conjunction with other Consultant Disciplines, make recommendations to the Project Manager on the need for specialist Contractors and suppliers to design and execute any sections of the Works and take any action necessary to implement the Project Manager's instructions.
- Co-ordinate all design work, exercise all reasonable skill, care and diligence to 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 to rectify deficiencies.
- Prepare and keep updated a Maintenance and Operational Strategy and prepare a Management and Maintenance Plan in line with NLHF requirements.
- Prepare a Conservation Management Plan in line with NLHF requirements.
- Prepare a report showing the progress made against the agreed design programme and confirm in the report that the approved cost limit and programme generally is being maintained and submit the report to the Project Manager at not more than monthly intervals or at such intervals as the Project Manager may instruct.
- Agree material and construction specifications with the Consultant Disciplines and keep the Project Manager fully informed.
- Interface with the Consultant Disciplines to undertake Risk Assessments and Value Management procedures at all key design development stages.

RIBA Stage 3 - Spatial Coordination

- Lead the integration of designs from all disciplines into a coherent, spatially coordinated model.
- Ensure that clashes and inconsistencies are resolved across disciplines.
- Facilitate design team workshops to coordinate Architectural, structural, MEP, civil, landscape, and other disciplines.
- Ensure that regulatory requirements (Building Regulations, planning, fire strategy, etc.) are embedded in the design.
- Align the design with the cost plan and programme through regular consultation with the Cost Consultant and project manager.
- Support the Client in preparing any planning application submissions.
- Liaise with the Local Planning Authority and any other appropriate statutory bodies to seek their support for the scheme, holding regular meetings as necessary to explain and inform the developing design. Prepare coordinated planning applications and other statutory applications as necessary for the proposed works with all supporting documentation and thereafter coordinate the applications for discharge of any planning conditions.
- Assist the Project Manager to ensure statutory approvals for the Project are obtained and that all utilities and other necessary services are in place both for the construction phase and for permanent operation following completion of the Project.
- Give the Project Manager sufficient notice of all approvals, decisions or other matters which require action by the Client and, where appropriate assist the Project Manager by providing information and making recommendations.
- Where difficulties are highlighted during the design phase which may not be capable of being resolved and which may result in a failure to meet the Client's brief, submit a report to the Project Manager forthwith giving recommendations and options.

- Work with a change control procedure that has been agreed by the Project Manager throughout the design and construction stages seeking express approval for any chances that may have a material effect on the quality, cost, or programme of the project.
- Exercise all reasonable skill, care and diligence to ensure that the specifications prepared for the Works specifically exclude the use of materials being deleterious and subsequently exercise all reasonable skill, care and diligence to ensure that such materials are not used in connection with the Works.
- With the approval of the Project Manager, arrange for any required submissions of designs, drawings, models, calculations or other material to regulatory bodies and expedite any necessary approvals.
- Prepare and keep updated a Maintenance and Operational Strategy and prepare a Management and Maintenance Plan in line with NLHF requirements.
- Prepare a Conservation Management Plan in line with NLHF requirements.
- If instructed by the Project Manager (and subject to the payment of an additional fee) arrange to act as expert witness at any hearing or planning enquiry and the like or, alternatively, and with the approval of the Project Manager, arrange for other appointed Consultants to do so and manage their activities.

RIBA Stage 4 - Technical Design

- Lead the development of detailed and coordinated technical design information (specifications, construction details, etc.)
- Ensure that all design packages from specialist Consultants are integrated into a complete coordinated model.
- Oversee the coordination of specialist subContractor design input (Design and Build or novated scenarios).
- Manage technical compliance with building regulations and other statutory requirements.
- Provide a fully co-ordinated design stage package, ready for construction issue.
- Review and coordinate design risk assessments.
- Assist in preparing the tender documentation (if applicable).
- Ensure the final design aligns with the cost plan and construction methodology.
- Support the Client in preparing any planning application submissions.
- Liaise with the Local Planning Authority and any other appropriate statutory bodies to seek their support for the scheme, holding regular meetings as necessary to explain and inform the developing design. Prepare coordinated planning applications and other statutory applications as necessary for the proposed works with all supporting documentation and thereafter coordinate the applications for discharge of any planning conditions.
- Assist the Project Manager to ensure statutory approvals for the Project are obtained and that all utilities and other necessary services are in place both for the construction phase and for permanent operation following completion of the Project.

RIBA Stage 5 - Manufacturing and Construction

- Following discussion with the Contract Administrator, co-ordinate the collection of documents from Consultants to enable the Client to enter into contract and exercise all reasonable skill, care and diligence to ensure that any adjustments have been made to the documents so that they conform to the approval given by the Client.

- Provide such assistance as the Contract Administrator may require so that the Contract Administrator can agree a detailed programme for the Works with the Contractor which specifies completion by the agreed date.
- Attend the Contract Administrator ‘s meetings with the Contractor or with others.
- Establish and chair regular meetings with Consultant Disciplines to review design information and accept responsibility for monitoring the distribution of that information to the Contractor and the other Consultants as may be necessary and circulate minutes of the meeting to the Project Manager and to the other Consultants. The minutes shall record the action to be taken to rectify any deficiencies and shall indicate who is to be responsible for taking that action.
- Assist the Contract Administrator to ensure that rigorous safety policies are in pl and are implemented by the Contractor and sub-Contractors working on the site and that there is adequate protection for the public and others.
- Assist the Contract Administrator to ensure that rigorous quality management procedures are in pl throughout the construction phase.
- Make sure that a full set of coordinated For Construction information is issued to the Contractor upon Contract Start Date.
- Develop and agree with the Contractor an Information Release Schedule and adhere to all timescales agreed therein to avoid impact on the Contractor’s programme.
- Coordinate Request For Information responses throughout the construction period and ensure timely issue of the same to avoid impact on the Contractor’s programme.
- Ensure the ongoing design coordination in response to any changes arising from site.
- Coordinate review of Contractor Design Proposals by all members of the Design Team and issue coordinated response within a timely manner to avoid impact on the Contractor’s programme.
- Assist the Contract Administrator to deal with all matters, including (but not limited to) all activities in connection with the adjudication of disputes between the Client and the Contractor concerning the Works contract as is necessary to ensure the satisfactory completion of the Works.
- Arrange for any special inspections or tests necessary to ensure proper and adequate standards of construction are maintained and that all works are constructed in accordance with the contract documents. Such inspections to be authorised by the Client in the first instance where additional costs will be incurred.
- Assist in the implementation of an agreed change control procedure throughout the construction stage seeking express approval for any changes that may have a material effect on the quality, cost, or programme of the project.
- Throughout the construction phase and until all construction accounts are settled, inform the Contract Administrator of any contractual claims which have been received or are likely to arise and provide advice, information or recommendations as is necessary so that the Contract Administrator can deal with such claims.
- Assist the Contract Administrator to continue to monitor the construction phase and to take any necessary action to complete the project within the cost approved by the Client and by the programmed completion date.
- Assist the Contract Administrator to ensure that adequate records and photographs are available at all times throughout the construction phase, to record progress of the Works and, particularly highlighting any delays or delays resulting from interaction between Contractors or sub-Contractors working on the site.
- Exercise all reasonable skill, care and diligence to ensure that Consultant Disciplines observe the provisions of their Appointment regarding cost control procedures and that the procedures for obtaining approval to introduce variations.

- Make recommendation to the Contract Administrator regarding the quality of the works in accordance with the contract drawings and specifications. Advise on course of action where issues arise.
- Co-ordinate site visits of other Consultant Disciplines and exercise all reasonable skill, care and diligence to ensure that the frequency of these visits is satisfactory.
- Comment on the progress of the works and inform the Contract Administrator four weeks before the anticipated date of completion of the Project.
- With the Principal Designer, ensure complete review of the Contractors proposed Operation and Maintenance Manuals/Health and Safety files and confirm that they are suitable to allow the handover of the project.
- Advise the Contract Administrator on the completion of the works and recommend whether in the services provider's opinion the works have been completed or not to an appropriate standard that will allow the Practical Completion or Section Completion certificate as appropriate.
- Undertake inspections and snagging and exercise all reasonable skill, care and diligence to ensure that lists of defects are issued at the appropriate time under the Contract.

RIBA Stage 6 - Handover and Close Out

- Exercise all reasonable skill, care and diligence to ensure that all defects are rectified.
- Exercise all reasonable skill, care and diligence to ensure that the Works are cleaned, tested and commissioned prior to handover to the Client in accordance with the Handover Strategy.
- Exercise all reasonable skill, care and diligence to ensure that all statutory certificates and approvals are given to the Contract Administrator.
- Assist the Quantity Surveyor to co-ordinate the production of the final accounts and the issue of final certificates.
- Undertake tasks listed in Handover Strategy.
- Review updated Project Information.
- Review and respond to any reported defects during the defects liability period and advise of cause and proposed remedial works so that the Contractor is instructed accordingly.
- At expiry of the defects liability period, carry out an inspection of the project works and compile a final list of coordinated defects for rectification under the contract. Issue such list to the Project Manager and re-inspect once corrective works have been undertaken by the Contractor.
- Confirm satisfactory completion of the works to enable the issue of the Making Good Defects certificate and Final Certificate for the project.

2.2.3 Duties of The Architect

General

- Prepare the Conservation Management Plan
- Provide Architectural design services as required for the project from inception to completion.
- Liaise with other Consultants on the project team and ensure that the services listed hereunder are fully coordinated with the services provided by those Consultants.
- Participate in the operation of an early warning system whereby the Architect shall notify the Client, Project Manager, other Consultants and Contractor as soon as the Architect is aware of a matter that may adversely affect the project or its performance.
- Input to and coordinate with the Principal Designer role as defined by the CDM Regulations (2015) and the Building Safety Act 2022 and provide design information and designer's risk assessments.
- Attend meetings with the Client, Project Manager, Quantity Surveyor, Lead Designer, other Consultants and Contractors as necessary for the performance of the services.

- Participate in value engineering, value management, sustainability and risk management workshops and exercises throughout the project duration.
- Participate in the Change Control Procedures and monitor design development against the Project Budget.
- The Architect, Client and his/her representatives, other Consultants and all stakeholders will work closely together to foster a partnering culture. The culture will embody the principles of mutual trust and co-operation with an overall aim of delivering a successful project on time and to budget.
- Perform the Services necessary for completion of the works in line with the project programme.
- Give to the Client reasonable prior notice of and invite the Client to attend all meetings called by the Consultant in relation to the Project; attend all meetings called by the Client, the Project Manager and the Other Consultants in relation to the Project as appropriate/ reasonable.
- Keep full and proper records of all key meetings and negotiations attended or conducted by the Consultant and make the same available for inspection by the Client forthwith on request.
- Deliver the Project in line with the Project Execution Plan (PEP) and report progress against the PEP baseline throughout.
- Present proposals to funders e.g. Heritage Fund as required at the end of each RIBA stage.
- Support the Client in preparing funding applications in relation to their area of work
- Perform such other duties as may reasonably be required by the Client to secure the completion of the Project.
- The Consultant shall, if requested to do so, assist the Client in respect of any claims or proceedings made in relation to any of the Other Consultants or the Contractors.
- The Consultant shall issue monthly project progress reports detailing the project status under the following headings:
  - Works Undertaken
  - Forthcoming Actions
  - Information / Decisions / Key Actions Required
  - Cost report
  - Risk Issues
  - Issued Information / Design Status.

RIBA Stages 2 & 3 - Design Concept/ Spatial Co-ordination

- Receive the Client's initial brief from the Project Manager and provide such assistance as is necessary to identify possible options and expenditure limits.
- Research, develop and prepare a fully illustrated Conservation Management Plan on the historic and natural environment on the site including its collections, in accordance with current guidance and best practice. The CMP will include, as a minimum, the following sections:
  - Introduction
  - Understanding the asset
  - Assessment of significance
  - Issues, opportunities and policies/principles of conservation;
  - Illustrated gazetteer of the historic and natural environment assets on the site, including comment on their condition in sufficient detail for the design team to know, for example, how to treat the surf/finishes (if any surviving), what to do with surviving fittings, detailing etc. A full draft of the CMP should be completed by the end of RIBA 2.
  - Undertake appropriate consultation with key stakeholders, including local authority Conservation Officers and Historic England in relation to the CMP.
  - Attend and feed into wider public consultation (one event) in relation to the CMP

- Liaise with other members of the project team, in particular the Design Team, to help sustain or enhance the significance and where necessary work towards minimising the impact of works on the significance of the assets.
- Present the Conservation Management Plan to the Client and NLHF.
- By the end of RIBA 2 produce an outline 10 Year Management and Maintenance Plan for the site in line with Heritage Fund requirements and finalise the plan at the end of RIBA 3.
- Undertake an initial appraisal of the site and constraints to inform the design of the scheme.
- Following the initial appraisal of the site subsequently consult as necessary with any local or other statutory authority on matters relating to the proposed Works as appropriate.
- Undertake risk assessments and inform the Project Manager and Lead Designer of an update required to the risk register. Advise of any risk mitigation measures that can be adopted.
- Undertake and contribute to value management exercises throughout to ensure that the scheme remains on budget. Liaise with the cost manager and other Consultants to inform the costings identified for the project.
- Input into the Environmental Sustainability Strategy for the project (draft at RIBA 2 and final version at end of RIBA 3).
- In co-operation with other members of the Project Team, develop outline proposals and submit to the Client including review of programme and costs. Undertake all work necessary to obtain the Client approval.
- In co-operation with the other members of the Project Team, develop a scheme design within the approved cost and submit to the Client for approval giving details of proposed specification and Contract Services.
- Make recommendations to the Client on the need for specialist Contractors to design and execute any sections of the Works or for specialist suppliers to provide any materials or equipment and obtain the Client approval and take any action necessary to implement the Client decision.
- Undertake third party consultations and any Research and Development aspects as required.
- In liaison with the other members of the Project Team assist in the preparation of a cost plan based on the approved cost and the anticipated start and completion dates and, thereafter, monitor the development of the scheme design against the cost plan and report any anticipated difficulty to the Client including proposals for overcoming that difficulty and obtain the Client instructions in sufficient time to allow corrective action to be taken.
- Exercise all reasonable skill, care and diligence to 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 to rectify deficiencies.
- Make all necessary submissions to statutory authorities, including Building Control, and obtain approvals.
- Identify any design changes through the design development phase clearly so that the costings for the scheme reflect the latest design. Follow the change control process that will be implemented by the Project Manager.
- Where the Client has indicated the possibility of a change to the agreed brief during the design phase, inform the Client of the cost and programme implications and obtain the Client instructions.
- Exercise all reasonable skill, care and diligence to ensure that life cycle costings and environmental assessment techniques are applied to the design, 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.
- Exercise all reasonable skill, care and diligence to ensure that the specifications prepared for the Works specifically exclude the use of materials accepted as being deleterious at the time and

subsequently exercise all reasonable skill, care and diligence to ensure that such materials are not used in connection with the Works.

- Align the design with the project's environmental and sustainability goals.
- In co-operation with the other members of the Project Team, complete the design of the Project up to tender stage.
- At the end of each RIBA Stage prepare a fully coordinated design report and issue to the Lead Designer for coordination and final production of each end stage report.
- In liaison with the other members of the Project Team, make recommendations to the Client on the suitability of firms who may be invited to submit a tender for the main Works and any specialist Works and obtain instructions.
- In liaison with the other members of the Project Team, exercise all reasonable skill, care and diligence to ensure that all drawings, specifications, schedules, bills of quantities or other documents necessary for the placing of contracts are completed and are fully co-ordinated, are in accordance with the brief approved by the Client and are available on the programmed date.
- Exercise all reasonable skill, care and diligence to ensure that a pre-tender cost check is prepared based on the tender documentation.
- Undertake risk assessments and attend risk workshops.
- Undertake value management exercises.
- Examine tenders received and, in liaison with other members of the Project Team, make recommendations to the Client.
- Obtain the Project Manager's approval to proceed to the next RIBA Stage.

RIBA Stage 4 – Technical Design

- At the end of each RIBA Stage prepare a fully coordinated design report that is compliant with the relevant regulations and issue to the Lead Designer for coordination and final production of each end stage report.
- In liaison with the other members of the Project Team, make recommendations to the Client on the suitability of firms who may be invited to submit a tender for the main Works and any specialist Works and obtain instructions.
- In liaison with the other members of the Project Team, exercise all reasonable skill, care and diligence to ensure that all drawings, specifications, schedules, bills of quantities or other documents necessary for the placing of contracts are completed and are fully co-ordinated, are in accordance with the brief approved by the Client and are available on the programmed date.
- Exercise all reasonable skill, care and diligence to ensure that a pre-tender cost check is prepared based on the tender documentation.
- Undertake risk assessments and attend risk workshops.
- Undertake value management exercises.
- Examine tenders received and, in liaison with other members of the Project Team, make recommendations to the Client.
- Obtain the Project Manager's approval to proceed to the next RIBA Stage.

RIBA Stage 5 – Construction

- In liaison with the other members of the Project Team, provide the Client with drawings or other documents necessary for entering into contract.
- Undertake risk assessments and inform the Project Manager and Lead Designer of any updates required to the risk register. Advise of any risk mitigation measures that can be adopted.
- Undertake value management exercises throughout to ensure that the scheme remains on budget. Liaise with the cost manager and other Consultants to inform the costings identified for the project.
- In collaboration with the other members of the Project Team, assist in administering the terms of the Works contract during operations on site and relating to the completion of the Works.
- Until completion of the project, report to the Lead Designer at monthly intervals on the progress of the Works and their compliance with the specification, highlighting any concerns regarding quality and identifying the need for corrective works or investigations to be undertaken to confirm their compliance with the specification.
- Exercise all reasonable skill, care and diligence to ensure that rigorous safety policies are in pl 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.
- Provide For Construction information to the Lead Designer in accordance with the programme to ensure fully coordinated information can be issued to the Contractor upon Contract Start Date.
- Input into the development of the Information Release Schedule and adhere to all timescales agreed therein to avoid impact on the Contractor's programme.
- Provide Request For Information responses throughout the construction period and ensure timely issue of the same to avoid impact on the Contractor's programme.
- Issue updated information in response to any changes arising from site.
- Review Contractor Design Proposals and provide response to the Lead Designer to coordinate and issue a full response within a timely manner to avoid impact on the Contractor's programme.
- Exercise all reasonable skill, care and diligence to ensure that rigorous quality management procedures are implemented throughout the construction phase.
- Attend the regular meetings with the Contractor and the other members of the Project Team as necessary to monitor the progress of the Works and the production of design information to the Contractor.
- 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 exercise all reasonable skill, care and diligence to ensure that the Works are completed fully in accordance with the contract documents.
- Inform the Project Manager of any contractual difficulties which may arise during the course of the contract and obtain the Project Manager's instructions.
- Inform the Project Manager four weeks before the anticipated date of completion of the Works.
- Provide 'As Builts' for inclusion into the Contractors proposed Operation and Maintenance Manuals/Health and Safety files.
- Advise the Lead Designer and Project Manager on the completion of the works and recommend whether in the services provider's opinion the works have been completed or not to an appropriate standard that will allow the Practical Completion or Section Completion certificate as appropriate.
- Undertake inspections and snagging and exercise all reasonable skill, care and diligence to ensure that lists of defects are issued at the appropriate time under the Contract.

RIBA Stage 6 - Handover & Close Out

- In liaison with the other members of the Project Team and the Contractor, undertake tasks listed in the Handover Strategy, provide the Client with a Health & Safety file, and Operations & Maintenance file, and set of record drawings for the project.
- Assist the Project Manager to issue a list of defects to the Contractor at the appropriate time in accordance with the terms of the Works contract.
- Assist the Project Manager to ensure that the Contractor rectifies the defects within an agreed time.
- Liaise with the other members of the Project Team regarding final valuation of the Works.
- Liaise with other members of the Project Team to assist the issue of the Final Certificate.
- Within 12 months of handover, participate in a workshop review of the project to assess Project Performance and to agree lessons learned and positive/negative aspects of the design and construction that will contribute to improvements on future projects.
- Provide updated Project Information if necessary.
- Review and respond to any reported defects during the defects liability period and advise of cause and proposed remedial works so that the Contractor is instructed accordingly.
- At expiry of the defects liability period, carry out an inspection of the project works and compile a final list of coordinated defects for rectification under the contract. Issue such list to the Project Manager and re-inspect once corrective works have been undertaken by the Contractor. Confirm satisfactory completion of the works to enable the issue of the Making Good Defects certificate and Final Certificate for the project.
- Update the Management and Maintenance Plan to reflect the completed works.
- Update the Conservation Plan following the completion of the capital works.

2.3 PRINCIPAL DESIGNER

2.3.1 Role, Scope, and Responsibilities

The main duties of the Principal Designer are to plan, manage, monitor, and coordinate, the pre-construction phase (including demolition) of a construction project, including any preparatory work necessary, to ensure as far as is reasonably practicable health and safety matters are given sufficient focus and attention.

Under the Construction (Design and Management) Regulations 2015 and Building Safety Act 2022 and for the Provision of Related Services, the following outcomes are expected:

Scope and responsibilities:

General:

- Provide health and safety services as defined by legislation and in line with other Project Objectives and health and safety best practice.
- The Consultant shall fulfil the role of Principal Designer as defined in the CDM Regulations 2015, and the HSE publication Managing Health & Safety in Construction (L153) and the Building Safety Act 2022, throughout the project duration and shall perform the obligations imposed on the Principal Designer in accordance with these Regulations.
- Identify and eliminate or control, so far as reasonably practicable, foreseeable risks to the health and safety of any person:
  - carrying out or liable to be affected by construction work;

  - maintaining or cleaning a structure; or
  - using a structure designed as a workplace.
- Liaise with other Consultants on the project team and ensure that the services listed hereunder are fully coordinated with the services provided by those Consultants.
- Participate in the operation of an early warning system whereby the Consultant shall notify the Project Manager, Lead Designer, other Consultants and Contractor as soon as the Consultant is aware of a matter that may adversely affect the project or its performance, or endanger their own health and safety or that of others.
- Inform the Client of its Duties under the CDM Regulations and the Building Safety Act 2022 and report to the Client anything the principal Designer is aware of in relation to the project which is likely to endanger their own health and safety or that of others.
- Advise as to health and safety considerations affecting or affected by procurement methods and approaches to design and construction.
- Ensure, as far as reasonably practicable, that designers comply with their statutory duties under health and safety legislation and building regulations.
- Attend meetings with the Client, Project Manager, Lead Designer, other Consultants and Contractor as necessary for the performance of the services.
- Participate in value engineering, value management and risk management workshops and exercises throughout the project duration.
- Cooperate with any other person working on or in relation to a project at the same or an adjoining construction site to the extent necessary to enable any person with a duty or function to fulfil that duty or function.
- Perform the Services necessary for completion of the works in line with the project programme.
- Give to the Client reasonable prior notice of and invite the Client to attend all meetings called by the Consultant in relation to the Project; attend all meetings called by the Client, the Project Manager and the Other Consultants in relation to the Project as appropriate/ reasonable.
- Keep full and proper records of all key meetings and negotiations attended or conducted by the Consultant and make the same available for inspection by the Client forthwith on request.
- Deliver the Project in line with the Project Execution Plan (PEP) and report progress against the PEP baseline throughout.
- Perform such other duties as may reasonably be required by the Client to secure the completion of the Project.
- The Consultant shall, if requested to do so, assist the Client in respect of any claims or proceedings made in relation to any of the Other Consultants or the Contractors.

RIBA Stages 2-4 Design - Concept, Developed and Technical:

- Provide advice to the Client on the health and safety skills, knowledge and experience and if they are an organisation, the organisational capabilities and resources of the proposed Lead Designer and their sub-Consultants prior to arrangements being made for design work to begin.
- Exercise all reasonable skill, care and diligence to ensure designers continue to co-operate and comply with their duties under Regulation 9.
- Plan, manage and monitor the pre-construction phase and coordinate matters relating to health and safety during the pre-construction phase to ensure that, so far as reasonably practicable, the project is carried out without risks to health or safety, taking into account the general principles of prevention.
- Coordinate matters relating to the design work to ensure that, if built, the design would result in work that complies with building regulations.

- Exercise all reasonable skill, care and diligence to ensure that all necessary safety measures have been taken and that adequate time and financial provisions have been made for complying with the Regulations.
- Assist the Client in provision of the pre-construction information required by Regulation 4(4) and ensure that the pre-construction information is prepared in time to be included in any tender or negotiation process for the Project.
- So far as it is within the Principal Designer's control, provide pre-construction information, promptly and in a convenient form, to every designer and Contractor appointed, or being considered for appointment, to the Project.
- Cooperate with and ensure that all persons working in relation to the preconstruction phase cooperate with the Client, the Principal Designer and each other.
- Review and comment upon tenders, providing advice to the Client on the health and safety skills, knowledge and experience and if they are an organisation the organisational capability and resources of the preferred tendering or negotiating prospective principal Contractors before appointment.
- Review and sign-off construction phase health and safety plan, advising the Client on the suitability or otherwise of the construction phase plan and the provision of the proposed welfare facilities, prior to construction work starting on site.
- During the pre-construction phase prepare a health and safety file appropriate to the characteristics of the Project which must contain information relating to the Project which is likely to be needed during any subsequent project to ensure the health and safety of any person.

RIBA Stage 5 - Construction:

- Liaise with the principal Contractor for the duration of the Principal Designer's appointment and share with the principal Contractor information relevant to the planning, management and monitoring of the construction phase and the coordination of health and safety matters during the construction phase.
- Assist the principal Contractor in preparing the construction phase plan by providing to the principal Contractor all information the Principal Designer holds that is relevant to the construction phase plan including pre-construction information obtained from the Client and any information obtained from designers under Regulation 9(3) (b).
- Ensure that the health and safety file is appropriately reviewed, updated and revised from time to time, up to the date when the Principal Designer's appointment has ended to take account of the work and any changes that have occurred.
- Exercise all reasonable skill, care and diligence to ensure designers continue to co-operate.
- Review any additional designs or design information prepared by the Contractor and/or the Design Team after construction of the project begins and advise the Client accordingly.
- Review 'As Constructed' Information. Exercise all reasonable skill, care and diligence to ensure that continued preparation of the health and safety file takes place.
- Respond to queries raised by Project Manager, Lead Designer, Contract Administrator or Contractor as required.

RIBA Stage 6:

- Review Project Information.
- Review the Operation and Maintenance Manuals including Health and Safety File and collate comments from the Lead Designer to feedback to Contractor.
- Review final Operation and Maintenance Manuals including Health and Safety File, sign off and deliver to the Client.

- Arrange a workshop with the Client's operations and maintenance team to talk them through the Operation and Maintenance Manuals including Health and Safety File, signposting specific points of note and information to adhere to, such as any specific cleaning and maintenance regimes required to maintain warranties.

RIBA Stage 7:

- Undertake any tasks listed in Handover Strategy.
- Within 12 months of handover, participate in a workshop review of the project to assess Project Performance and to agree lessons learned and positive/negative aspects of the design and construction that will contribute to improvements on future project.

2.4 CONTRACT ADMINISTRATOR

2.4.1 Role, Scope, and Responsibilities

General Service Requirements:

- Agree operational procedures with the Project Manager, the Client and the Professional Team to include communication channels, authority structure, reporting and meeting procedures between the Client, the Project Manager, and the Professional Team, including in relation but not limited to:
  - Design, specification and quality of the Works.
  - Programme and progress.
  - Budget and financial effects.
  - Compliance with any contractual obligations.
  - Monitoring the Works on the Project Site in compliance with the Building Contract.
  - The requirements of the Client.
- The convening, chairing, attendance, purpose, frequency of meetings, and the responsibility for recording of meetings and circulation of information.
- Comply with the procedures for coordinating the design and specification of the Works prepared by the Project Manager and Lead Designer, including procedures for the issue of all drawings, specifications and other documents and the maintenance of full and proper records by the Design Team.
- Assist the Project Manager as required to prepare, maintain and review not less than monthly the Project Master Programme and Contractor's short-term programme, indicating periods and critical dates for the design (by Contractor), construction and other principal activities. Report to the Client and Project Manager on progress against the Project Master Programme and Contractor's short-term programme and advise on and recommend to the Client action to be taken to mitigate delays which have occurred or which the Contractor may occur.
- Monitor as appropriate applications for all permissions, approvals, consents and the like required by any statute, regulation of the like relating to the project and advise the Client accordingly.
- Monitor the production of design information prepared by the Professional Team against any Information Required Schedules issued by the Contractor and if delayed use reasonable endeavors to expedite the production of the information, reporting back to the Project Manager.
- Monitor the production of design information prepared by the Contractor's Design Team, under any Design portion stipulated under the Contract. If delayed use reasonable endeavors to expedite the production of the information, reporting back to the Project Manager.
- Do not do or fail to do any act or thing which may cause or contribute to a breach by the Client of the Building Contract or any leases or licenses applicable to the site.

- Collaborate with the Project Manager and Lead Designer and any other Consultants in seeking from the Client any further information needed so that they can perform their services under their various agreements with the Client.
- Collaborate with the Project Manager and Lead Designer and any Other Consultants in making professional recommendations to the Client on likely impact of any proposed changes, instructions or variations may have in reference to their contractual commitments under the amended JCT Form of Contract.
- Become familiar with the agreed change control process, to ascertain the CA's role within it.
- Visit the site as necessary and study data and information relating to the Project and relevant to the Works which are reasonably accessible to the Consultant, and consider reports relating to the Works which have either been prepared by the Consultant or have been prepared by others and made available to the Consultant by the Client.
- Input into all Risk Management Workshops, and ongoing Risk Assessments, reporting directly to the Project Manager.
- Provide full Contract Administration duties as prescribed in the Project Agreement and Form of Contract.
- Attend all Client/Project Team, Design Team and Contractor meetings as required.
- Provide formal monthly reports pertaining to the CA's duties, to the Client and Project Manager.
- Following agreement (by others) of monthly valuations, issue formal certification for payment. Ensure that the Client is aware of the respective timescales for making such payments and monitor to ensure that such compliance is achieved.
- Following review via the change control process, and formal Client endorsement, issue all necessary instructions confirming changes to the parameters set out in the contract documentation.
- Input into the assessment of proposals made by others for items included as provisional and prime cost sums, and report on the impact that any of the options/decisions will have on the Client under the amended JCT Form of Contract. Monitor the instruction of all provisional and prime cost items against any request for information schedule prepared by the Contractor, to ensure compliance.
- Input into and report on the potential impact of the co-ordination of all Client / End User fit out works with the main construction works.
- Oversee the commissioning and handover phase of the construction project to ensure full compliance with the contractual terms stipulated within the contract documentation. (Witness testing and commissioning will be by others).
- Ensure that the Contractor discharges their duties as defined under the amended JCT Form of Contract, in respect of the making good of all defects during the prescribed liability period.
- Following effective remedy of all defects arising after practical completion up until the end of the defects liability period issue final payment certification.
- Support the Project Team, and in particular the Cost Managers in the agreement of the final account for the completed project.
- Input into the preparation (by others) of all necessary bonds, warranties and guarantees as required.
- Provide early notification to the Project Manager of any dispute or claim by the Contractor including a professional assessment of the Client's liability under such dispute or claim in part or full, as defined under the amended JCT Form of Contract.
- Lead on the resolution of any dispute or claim under the amended JCT Form of Contract. Receive all notices from the Contractor and collaborate with the whole of the Professional Team in assessing the impact / management / mitigation of each.

2.5 STRUCTURAL ENGINEER

2.5.1 Role, Scope, and Responsibilities

The main role of a Structural Engineer is to design structures that can withstand the stresses and pressures imposed by environmental conditions and human use.

General

- Provide structural and civil engineering design services as required for the project from inception to completion.
- Liaise with other Consultants on the project team and ensure that the services listed hereunder are fully coordinated with the services provided by those Consultants.
- Participate in the operation of an early warning system whereby the Structural Engineer shall notify the Client, Project Manager, other Consultants and Contractor as soon as the Structural Engineer is aware of a matter that may adversely affect the project or its performance.
- Input to and coordinate with the Principal Designer role as defined by the CDM Regulations (2015) and provide design information and designer's risk assessments.
- Attend meetings with the Client, Project Manager, Lead Designer, other Consultants and Contractor as necessary for the performance of the services.
- Participate in value engineering, value management, sustainability and risk management workshops and exercises throughout the project duration.
- Participate in the Change Control Procedures and monitor design development against the Project Budget.
- The Structural Engineer, Client and his/her representatives, other Consultants and all stakeholders will work closely together to foster a partnering culture. The culture will embody the principles of mutual trust and co-operation with an overall aim of delivering a successful project on time and to budget.
- Perform the Services necessary for completion of the works in line with the project programme.
- Give to the Client reasonable prior notice of and invite the Client to attend all meetings called by the Consultant in relation to the Project; attend all meetings called by the Client, the Project Manager and the Other Consultants in relation to the Project as appropriate/ reasonable.
- Keep full and proper records of all key meetings and negotiations attended or conducted by the Consultant and make the same available for inspection by the Client forthwith on request.
- Deliver the Project in line with the Project Execution Plan (PEP) and report progress against the PEP baseline throughout.
- Present proposals to funders e.g. Heritage Fund as required at the end of each RIBA stage.
- Support the Client in preparing funding applications in relation to their area of work
- Perform such other duties as may reasonably be required by the Client to secure the completion of the Project.
- The Consultant shall, if requested to do so, assist the Client in respect of any claims or proceedings made in relation to any of the Other Consultants or the Contractors.
- The Consultant shall issue monthly project progress reports detailing the project status under the following headings:
  - Works Undertaken
  - Forthcoming Actions
  - Information / Decisions / Key Actions Required
  - Cost report
  - Risk Issues
  - Issued Information / Design Status.

RIBA Stages 2-4 - Concept, Spatial Coordination and Technical

- Receive the Client's initial brief from the Project Manager and provide such assistance as is necessary to identify possible options and expenditure limits. Undertake an initial appraisal of the site and constraints to inform the design of the scheme.
- Following the initial appraisal of the site subsequently consult as necessary with any local or other statutory authority on matters relating to the proposed Works as appropriate.
- Identify surveys required and arrange for the carrying out of any geotechnical or other investigations authorised by the Client, interpret the results and, if necessary, make recommendations to the Client.
- Develop the structural engineering design within the approved cost and submit to the Client for approval.
- If necessary, advise the Client of the need to appoint specialist firms to design and execute sections of the Works and obtain the Client's approval to approach the firms concerned or to obtain competitive tenders.
- Ensure that the structural engineering design is fully integrated with the overall design of the project and that the works can be completed within the amount allocated for structural engineering within any overall cost plan and within the programmed time.
- Where applicable, co-operate with the other members of the Project Team in the preparation of a cost plan for the Project based on the overall cost approved by the Client.
- Attend all Design Team meetings, report on matters appertaining to the structural design and provide advice thereon to other Consultant Disciplines as may be necessary.
- Monitor the development of the scheme design against the approved cost and report any anticipated difficulty to the Client including proposals for overcoming that difficulty and obtain the Client's instructions in sufficient time to allow corrective action to be taken.
- Work with other members of the Project Team in the development and delivery of a working prototype which will be used to test design principals.
- Where the Client has indicated the possibility of a change to the agreed brief during the design phase, inform the Client of the cost and programme implications and obtain the Client's instructions.
- Complete the structural design up to tender stage and provide all information necessary for the completion of tender documentation.
- If applicable make recommendations to the Client on the suitability of firms who may be invited to submit tenders for the structural Works and obtain instructions.
- Ensure that life cycle costings and environmental assessment techniques are applied to the Project and adopt solutions giving the best overall value for money and, where this may result in the cost limit for the Works being exceeded, make recommendations to the Client and obtain instructions.
- Align the design with St Osyth's environmental and sustainability goals.
- With the other members of the Project Team, consider the most suitable options for the procurements of the Works, make recommendations to the Client and obtain instructions.
- With the other members of the Project Team, make recommendations to the Client on the suitability of firms who may be invited to submit tenders for the Works and any specialist Works and obtain instructions.
- Ensure that all drawings, specifications, schedules, or other documents necessary for the placing of the construction contract are completed and are fully co-ordinated, are in accordance with the brief approved by the Client and are available on the programmed date.
- Prepare such calculations and details relating to the Works as may be required for submission to any appropriate authority and obtain any necessary approvals.
- Discuss with the Client the need for site inspection staff and obtain instructions.

- Prepare further designs, specifications and drawings including, if necessary, bar bending schedules for the information of the Contractor executing the Works.
- Copy all correspondence regarding the obtaining of tenders direct to the Client.
- Examine tenders received, make recommendations to the Client and advise on any corrective action which may be required if the lowest tender is higher than the approved cost for the Works and obtain the Client's instructions.
- Undertake value management exercises.
- Minimise the need for Contractor design portion (CDP). Where CDP is required provide an approach to CDP which ensures the Client is well informed and has sign-off on identifying and including CDP items.
- Undertake risk assessments. Identify at each stage of design inherent areas of risk and suggest mitigation options to the Client.
- Obtain the Project Manager's approval to proceed at the end of each RIBA Stage.

RIBA Stage 3 – Spatial Co-ordination

- Collaborate with the Architect and other Consultants to ensure spatial coordination of the structural design with: Architectural elements (walls, floor levels, fenestration, etc.), MEP routes and zones (e.g., avoiding clashes with ducts, risers, plant) and Civil and below-ground drainage systems.
- Attend and Contribute to Design team co-ordination meetings
- Progress the structural design to a level that includes General arrangement drawings (plans, sections, elevations), Outline foundation strategy, Column/grid layouts, Indicative beam/slab arrangements, Preliminary sizing of key structural elements
- Provide design Information that supports planning requirements.
- Undertake or update structural calculations and analysis for the developed scheme.
- Provide preliminary assessments of: Loadings (dead, live, wind, seismic if relevant), Deflection, vibration, and stability, Feasibility of proposed structural systems and materials
- Begin identifying requirements for temporary works or site logistics (e.g., crane loading, propping).
- Highlight opportunities for value engineering or off-site construction.
- Begin developing outline specifications for structural elements (e.g., concrete strength, steel grades).
- Identify key structural risks (e.g., ground conditions, existing structure interactions, lateral stability).
- Update risk register and support the lead designer with relevant information.
- Provide input on structural aspects of CDM risk assessments.

RIBA Stage 4 - Technical Design

- Prepare fully detailed structural calculations and designs for: Foundations (e.g., piles, rafts, pads), Substructures (e.g., basements, retaining walls), Superstructures (e.g., slabs, beams, columns, frames, cores).
- Finalise load paths, member sizes, and connection types.
- Develop reinforcement layouts, steelwork details, and any special structures (e.g., cantilevers, long spans).
- Finalise lateral stability strategy, including bracing and shear walls.
- Prepare fully coordinated drawings, including General arrangement drawings, Reinforcement drawings and bar bending schedules, Steelwork fabrication drawings, Sections and details of all structural elements
- Provide structural specifications (e.g., concrete grade, rebar cover, steel specifications) in accordance with relevant codes (e.g., Eurocodes, BS).

- Collaborate with the Architect, MEP engineers, and other specialists to ensure: The structural design is spatially coordinated with all systems & no clashes exist (e.g., beams clashing with ducts or services).
- Regularly participate in design coordination workshops and BIM clash detection reviews.
- Integrate Contractor design portions (if applicable, e.g., precast, steel fabricator input).
- Ensure full compliance with Building Regulations Part A and relevant structural standards
- Provide detailed design risk assessments to support CDM 2015 obligations.
- Support the preparation and submission of statutory applications, such as Building Control submissions.
- Finalise all structural documents and details for inclusion in Tender & Construction packages
- Clearly define design scope and responsibilities in the Design Responsibility Matrix.
- Review and respond to technical queries from the Contractor.
- Advise on temporary works design interfaces, sequencing, and stability during construction.
- Identify any structural elements that require special installation sequences or site constraints.
- Review and update the structural risk register.
- Manage and document any changes to the structural design via the formal design change control process.
- Identify and address construction risks (e.g., deep excavations, adjacent structures).
- Provide support to the Cost Consultant by ensuring the structural design Aligns with the project cost plan & is buildable within budget using cost-effective materials and methods.
- Contribute to value engineering reviews without compromising safety or compliance.

RIBA Stage 5 - Construction

- Where required, provide the Client with drawings or other documents necessary for entering into contract (or alternatively follow the procedure for the appointment of specialist subContractors).
- Undertake value management exercises.
- Undertake risk assessments. Identify at each stage of design inherent areas of risk and suggest mitigation options to the Client.
- In collaboration with the other members of the Project Team, assist the Project Manager in administering the terms of the Works contract during operations on site and relating to the completion of the Works.
- Attend the regular meetings with the Contractor and other members of the Project Team as necessary in order to monitor the progress of the Works and the Contractors' need for design information.
- 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 executed in accordance with the Works contract and in accordance with good engineering practice.
- Exercise all reasonable skill, care and diligence assist the Project Manager and Principal Designer to ensure that rigorous safety policies are in place and are implemented by the Contractor and that there is adequate protection for the public and others. Exercise all reasonable skill, care and diligence to ensure that all health and safety statutory requirements or regulations are being observed by all those responsible for either designing or constructing the Works and that adequate monitoring procedures are in place to ensure day to day compliance.
- Provide For Construction information to the Lead Designer in accordance with the programme to ensure fully coordinated information can be issued to the Contractor upon Contract Start Date.
- Input into the development of the Information Release Schedule and adhere to all timescales agreed therein to avoid impact on the Contractor's programme.
- Provide Request For Information responses throughout the construction period and ensure timely issue of the same to avoid impact on the Contractor's programme.
- Issue updated information in response to any changes arising from site.

- Review Contractor Design Proposals and provide response to the Lead Designer to coordinate and issue a full response within a timely manner to avoid impact on the Contractor's programme.
- Exercise all reasonable skill, care and diligence to 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 to rectify deficiencies.
- Ensure that rigorous quality management procedures relevant to the structural engineering design and specification are in place throughout the construction phase.
- Visit the site at regular intervals during the construction of the Works to inspect the quality of the work and to monitor progress. Exercise all reasonable skill, care and diligence to ensure that the Works are executed in accordance with the Works contract and in accordance with good engineering practice.
- Advise the Project Manager on the need for special inspections and tests and, following approval, arrange for the inspections and tests to be undertaken. Inform the Client of the results and, with the approval of the Project Manager, take the necessary action to ensure that any deficiencies are rectified.
- Inform the Project Manager of any contractual difficulties which may arise during the course of the Works contract and obtain the Project Manager's instructions.
- Inform the Project Manager four weeks before the anticipated date of practical completion.
- Provide 'As Builts' for inclusion into the Contractors proposed Operation and Maintenance Manuals/Health and Safety files.
- Advise the Lead Designer and Project Manager on the completion of the works and recommend whether in the services provider's opinion the works have been completed or not to an appropriate standard that will allow the Practical Completion or Section Completion certificate as appropriate.
- Undertake inspections and snagging and exercise all reasonable skill, care and diligence to ensure that lists of defects are issued at the appropriate time under the Contract.

Stage 6 RIBA - Handover & Close Out

- In liaison with the other members of the Project Team and the Contractor, undertake tasks listed in the Handover Strategy, provide the Client with a Health & Safety file, and Operations & Maintenance file, and set of record drawings for the project.
- Assist the Project Manager to issue a list of defects to the Contractor at the appropriate time in accordance with the terms of the Works contract.
- Assist the Project Manager to ensure that the Contractor rectifies the defects within an agreed time.
- Liaise with the other members of the Project Team regarding final valuation of the Works.
- Liaise with other members of the Project Team to assist the issue of the Final Certificate.
- Within 12 months of handover, participate in a workshop review of the project to assess
- Project Performance and to agree lessons learned and positive/negative aspects of the design and construction that will contribute to improvements on future projects.
- Provide updated Project Information if necessary.
- Review and respond to any reported defects during the defects liability period and advise of cause and proposed remedial works so that the Contractor is instructed accordingly.
- At expiry of the defects liability period, carry out an inspection of the project works and compile a final list of coordinated defects for rectification under the contract. Issue such list to the Project Manager and re-inspect once corrective works have been undertaken by the Contractor. Confirm satisfactory completion of the works to enable the issue of the Making Good Defects certificate and Final Certificate for the project.

2.6 MECHANICAL AND ELECTRICAL SERVICES CONSULTANTS

2.6.1 Role, Scope, and Responsibilities

The main role of a Mechanical and Electrical Consultant is to design systems and engineer solutions that are safe, efficient and functional.

Scope and responsibilities:

General

- Provide mechanical and electrical design services as required for the project from inception to completion to cover all aspects of the project set out in Section 1 and 2 of the ITT.
- Liaise with other Consultants on the project team and ensure that the services listed hereunder are fully coordinated with the services provided by those Consultants.
- Participate in the operation of an early warning system whereby the Engineer shall notify the Client, Project Manager, Lead Designer, other Consultants and Contractor as soon as the Engineer is aware of a matter that may adversely affect the project or its performance.
- Input to and coordinate with the Principal Designer role as defined by the CDM Regulations (2015) and provide design information and designer's risk assessments.
- Attend meetings with the Client, Project Manager, Cost Manager, Lead Designer, other Consultants and Contractors as necessary for the performance of the services. Ensure sufficient and knowledgeable representation of both mechanical and electrical services provision at meetings and discussions.
- Participate in value engineering, value management, sustainability and risk management workshops and exercises throughout the project duration.
- Participate in the Change Control Procedures and monitor design development against the Project Budget.
- The Engineer, Client and his/her representatives, other Consultants and all stakeholders will work closely together to foster a partnering culture. The culture will embody the principles of mutual trust and co-operation with an overall aim of delivering a successful project on time and to budget.
- Provide full building services engineering design services as required for the project from inception to completion. Services may include where relevant:
    - Air-conditioning and Mechanical Ventilation services
    - Heating and Auxiliaries
    - Cold Water Services
    - Cooling Water Services
    - Distribution Mains for any Services
    - Drainage
    - Electrical Distribution Services
    - Electricity Lighting and Power Installations, including Lighting Fittings.
    - Fire Detection and Alarm Services
    - Fire Protection Services
    - Food Preparation, cooking, conveying and serving equipment (services' connections; power supplies and wire-ways only)
    - Fuel Gas Incoming Supply and Distribution
    - Heating Installations
    - Hot Water Services

- Irrigation services (connections and control/BMS interface to specialist design by others)
- Incoming Electrical Supplies
- Lightning Protection Services
- Lifts, Hoists and Escalators
- Building management system (BMS)
- Public Address, Personnel Location and Call Services
- Public Health and Plumbing Services Refrigeration Installations
- Security (electrical services connections to security system only)
- Services/supply/distribution of IT/AV (to strategy by others which may incorporate facility for
- common networking of IP systems)
- Exhibition requirements (power/ data)
- Telephone Equipment and Distribution Services (services' connections; power supplies and
- wire-ways only)
- Building physics, SAAP, FEES. Daylight assessments, overheating assessments, passive ventilation, dynamic modelling, thermal comfort (if required)
- Input into appointment of other Consultants/Contractors
- EMF/EMI (incorporation of recommendations by separately appointed).

- Perform the Services necessary for completion of the works in line with the project programme.
- Give to the Client reasonable prior notice of and invite the Client to attend all meetings called by the Consultant in relation to the Project; attend all meetings called by the Client, the Project Manager and the Other Consultants in relation to the Project as appropriate/ reasonable.
- Keep full and proper records of all key meetings and negotiations attended or conducted by the Consultant and make the same available for inspection by the Client forthwith on request.
- Deliver the Project in line with the Project Execution Plan (PEP) and report progress against the PEP baseline throughout.
- Present proposals to funders e.g. Heritage Fund as required at the end of each RIBA stage.
- Support the Client in preparing funding applications in relation to their area of work
- Perform such other duties as may reasonably be required by the Client to secure the completion of the Project.
- The Consultant shall, if requested to do so, assist the Client in respect of any claims or proceedings made in relation to any of the Other Consultants or the Contractors.
- The Consultant shall issue monthly project progress reports detailing the project status under the following headings:

- Works Undertaken
- Forthcoming Actions
- Information / Decisions / Key Actions Required
- Cost report
- Risk Issues
- Issued Information / Design Status.

RIBA Stage 2 - Design Concept

- Receive the Client's initial brief from the Project Manager and provide such assistance as is necessary to identify possible options and expenditure limits.
- Undertake a full review of all the services across the site and any constraints to inform the design of the scheme.
- Following the initial appraisal of the site subsequently consult as necessary with any local or other statutory authority on matters relating to the proposed Works as appropriate.

- Review existing survey information and confirm outline scope of works required.
- Arrange for the carrying out of any site investigation authorised by the Client and interpret the results and, if necessary, make recommendations to the Client.
- In co-operation with the other members of the Project Team, undertake such studies as may be necessary to submit proposals on the building services together with options and recommendations to the Client, including an anticipated programme and installation and operational costs and undertake all further work necessary to obtain the Client's approval to proceed on the basis of the agreed proposals. Also identify any additional surveys required and facilitate the Client in arranging these.
- Develop the building services design within the approved cost and submit to the Client for approval.
- Where applicable, co-operate with the other members of the Project Team in the preparation of a cost plan for the Project based on the overall cost approved by the Client.
- Exercise all reasonable skill, care and diligence to ensure that the building services design is fully integrated and coordinated with the overall design of the Project and that the Works can be completed within the amount allocated for building services in any overall cost plan and within the programmed time.
- Identify major items of plant and equipment necessary for the Works and undertake investigations as to their technical suitability and availability. Also consider and advise the Client on lifecycle costs of new equipment.
- To the extent considered necessary, and following consultation with, and approval by the Client, invite pre-tender quotations for plant and equipment.
- If necessary, advise the Client of the need to appoint specialist firms to supply equipment or to design and execute sections of the Works and obtain the Client's approval to approach the firms concerned.
- Monitor the development of the scheme design against the approved cost and report any anticipated difficulty to the Client including proposals for overcoming that difficulty and obtain the Client's instructions in sufficient time to allow corrective action to be taken.
- Where the Client has indicated the possibility of a change to the agreed brief during the design phase, advise the Client of the cost and programme implications relevant to the building services contract works and obtain the Client's instructions.
- Make recommendations to the Client on the pre-ordering of items of plant and equipment, obtain instructions accordingly.
- Align the design with the Trusts environmental and sustainability goals.
- Attend all Design Team meetings, report on the matters appertaining to the building services design and provide advice thereon to other Consultant Disciplines as may be necessary.
- Complete the design of the building services up to tender stage and provide all information necessary for the completion of the tender documents.
- Exercise all reasonable skill, care and diligence to ensure that life cycle costings and environmental assessment techniques are applied to the Project and adopt solutions giving the best overall value for money and, where this may result in the cost limit for the Works being exceeded, make recommendations to the Client and obtain instructions.
- With the other members of the Project Team, consider the most suitable options for the procurement of the Works, make recommendations to the Client and obtain instructions.
- With the other members of the Project Team, make recommendations to the Client on the suitability of firms who may be invited to submit tenders for the Works and any specialist Works and obtain instructions.
- Exercise all reasonable skill, care and diligence to ensure that all drawings, specifications, schedules, or other documents necessary for the placing of the contract are completed and are fully co-ordinated, are in accordance with the brief approved by the Client and are available on the programmed date.

- The M&E Consultant will provide a system diagram of the power requirement for the loading in the Exhibition.
- The M&E Consultant will specify how the Exhibition M&E designs connect/interface with the M&E infrastructure.
- The M&E Consultant will provide power and data cable layouts for the Exhibition and will advise on air flow and heat gain outputs.
- Produce final design work (drawings and specifications) for any mechanical or electrical works required in connection with the Exhibition.
- Prepare such details relating to the Works as may be required for submission to any appropriate authority and obtain any necessary approvals.
- Exercise all reasonable skill, care and diligence to ensure that a pre-tender cost check on the design of the building services is prepared based on the tender documentation and inform the Client of the result of that check.
- Discuss with the Client the need for site inspection staff and obtain instructions.
- Prepare all further designs, specifications and drawings necessary for the Contractor to execute the Works.
- Examine tenders received, make recommendations to the Client and advise on any corrective action which may be required if the lowest tender is higher than the approved cost for the Works and obtain the Client's instructions.
- Undertake value management and value engineering exercises as required by the Client.
- Minimise the need for Contractor design portion (CDP). Where CDP is required provide an approach to CDP which ensures the Client is well informed and has sign-off on identifying and including CDP items.
- Undertake risk assessments. Identify at each stage of design inherent areas of risk and suggest mitigation options to the Client.
- Obtain the Project Manager's approval to proceed to the next RIBA stage.

RIBA Stage 3 -Spatial Coordination

- Progress outline designs into coordinated technical solutions including: Mechanical systems (heating, cooling, ventilation, air conditioning), Electrical systems (lighting, power, ICT, security), Public health systems (water, drainage, sanitaryware)
- Finalise key strategies: Energy strategy and decarbonisation path (including heat pumps, renewables, etc.), Ventilation strategy (natural/mechanical/mixed-mode), Lighting strategy, including emergency and daylight integration, Water conservation and sustainable drainage systems (SuDS)
- Coordinate all MEP routes and plant locations with: Structural zones (e.g., beam penetrations, floor voids), Architectural layouts (ceilings, risers, plant rooms)
- Produce initial 3D models (typically LOD 300) and 2D drawings showing coordinated routes, sizes, and riser locations.
- Update preliminary thermal, electrical, and water load calculations.
- Size major plant and distribution systems (e.g., ductwork, pipes, cables).
- Confirm riser and plant room sizes with final layout coordination.
- Ensure designs align with: Building Regulations Part L (energy efficiency), BREEAM, LETI, Passivhaus, or Client sustainability targets, Fire strategy (e.g., smoke extract, fire dampers, compartmentation)
- Integrate input from acoustic, fire, and sustainability Consultants.
- Attend and contribute to multidisciplinary design team meetings.
- Coordinate with specialist systems (e.g., lift, AV, BMS, renewables).

- Identify MEP-specific design risks (e.g., overheating, access to equipment) and update the risk register.
- Collaborate with the Cost Consultant to align the MEP design with the project cost plan.
- Provide equipment schedules and outline specifications for key components.
- Begin advising on buildability, system access, maintenance zones, and plant logistics.
- Present and explain MEP strategies to the Client and other stakeholders (e.g., FM team, planners).
- Support planning submission with: Energy strategy report, Ventilation/extraction statements (if required), Plant noise and location assessments.

RIBA Stage 4 - Technical Design

- Develop fully engineered and coordinated designs of: Mechanical systems (HVAC, heating, cooling, ventilation), Electrical systems (power, lighting, emergency, fire alarms, ICT, security), Public health systems (hot/cold water, above and below ground drainage, sanitary systems)
- Finalise and coordinate the design with: Architect's layouts (ceiling heights, plant rooms, risers), Structural zones and penetrations, Specialist systems (e.g. lifts, BMS, sprinklers, solar PV)
- Prepare detailed drawings, schedules, and schematics, including: Pipework, ductwork, and cable routing with sizing, Plant room layouts and sections, Equipment selections and performance criteria, Final schematic diagrams (e.g., flow and return, single-line wiring)
- Issue fully coordinated MEP design packages for construction or tender
- Participate in regular coordination sessions with Architect, structural, and other Consultants.
- Resolve all clashes through coordination workshops.
- Ensure buildability, access, and maintenance requirements are fully incorporated into the design.
- Ensure compliance with: Building Regulations (e.g., Part L, F, G, P), British Standards / CIBSE Guides / IEC, Fire strategy, BREEAM, and energy performance targets
- Coordinate systems to meet: Acoustic performance, Overheating assessments, Planning conditions and statutory obligations
- Produce detailed technical specifications (e.g., NBS, CIBSE format)
- Provide full equipment schedules: Performance requirements, Product selections (with approvals or alternatives), Space, weight, and access allowances
- Support tendering by: Answering technical queries, Advising on Contractor design portions (CDP), Reviewing Contractor proposals if novated or under D&B
- Define MEP Consultant vs. Contractor design responsibilities clearly in the Design Responsibility Matrix
- Ensure systems are buildable, accessible for maintenance, and coordinated for sequencing and installation.
- Identify and document installation risks, commissioning requirements, and temporary works considerations for major plant.
- Work with the Quantity Surveyor to: Ensure system selections align with the cost plan, Support value, engineering exercises without compromising performance or compliance, Optimise lifecycle and operational cost

RIBA Stage 5 - Construction

- Where required, provide the Client with drawings, specifications or other documents necessary for entering into the Works contract (or alternatively follow the procedures for the appointment of specialist sub-Contractors).
- Undertake value management and value engineering exercises as required by the Client.

- Undertake risk assessments. Identify at each stage of design inherent areas of risk and suggest mitigation options to the Client.
- In collaboration with the other Project Team members, assist the Project Manager in administering the terms of the Works contract during operations on site and relating to the completion of the Works.
- Agree a programme for the Works with the building services Contractor which specifies completion by the agreed programme date.
- Attend the regular meetings with the Contractor as necessary to monitor the progress of the Works and the Contractor's need for design information.
- Exercise all reasonable skill, care and diligence assist the Project Manager and Principal Designer to ensure that rigorous safety policies are in place and are implemented by the 48 Contractor and that there is adequate protection for the public and others. Exercise all reasonable skill, care and diligence to ensure that all health and safety statutory requirements or regulations are being observed by all those responsible for either designing or constructing the Works and that adequate monitoring procedures are in place to ensure day to day compliance.
- Provide For Construction information to the Lead Designer in accordance with the programme to ensure fully coordinated information can be issued to the Contractor upon Contract Start Date.
- Input into the development of the Information Release Schedule and adhere to all timescales agreed therein to avoid impact on the Contractor’s programme.
- Provide Request For Information responses throughout the construction period and ensure timely issue of the same to avoid impact on the Contractor’s programme.
- Issue updated information in response to any changes arising from site.
- Review Contractor Design Proposals and provide response to the Lead Designer to coordinate and issue a full response within a timely manner to avoid impact on the Contractor’s programme.
- Exercise all reasonable skill, care and diligence to 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 to rectify deficiencies.
- Exercise all reasonable skill, care and diligence to ensure that rigorous quality management procedures are in place throughout the construction phase.
- Visit the site at regular intervals during the construction of the Works to inspect the quality of the work and to monitor progress. Exercise all reasonable skill, care and diligence to ensure that the Works are executed in accordance with the Works contract and in accordance with good engineering practice.
- Advise the Project Manager on the need for special inspections and tests and, following approval, arrange for the inspections and tests to be undertaken. Inform the Client of the results and, with the approval of the Project Manager, take the necessary action to ensure that any deficiencies are rectified.
- Inform the Project Manager of any contractual difficulties which may arise during the course of the Works contract and obtain the Project Manager's instructions.
- Inform the Project Manager four weeks before the anticipated date of practical completion.
- Oversee any commissioning tests to be carried out by the Contractor. Assess the results and exercise all reasonable skill, care and diligence to ensure that the tests are satisfactory and meet the performance and other requirements stipulated in the Works contact.
- If any commissioning tests fail to meet the requirements in any way, exercise all reasonable skill, care and diligence to ensure that, at no cost to the Client, the Contractor complies with his contractual obligations and rectifies any defects in the Works. Subsequently, arrange for such further tests to be undertaken until satisfactory results are obtained.

- Where relevant, issue certificates to the Contractor related to the completion of the works and or commissioning.
- Provide ‘As Builts’ for inclusion into the Contractors proposed Operation and Maintenance Manuals/Health and Safety files.
- Advise the Lead Designer and Project Manager on the completion of the works and recommend whether in the services provider’s opinion the works have been completed or not to an appropriate standard that will allow the Practical Completion or Section Completion certificate as appropriate.
- Undertake inspections and snagging and exercise all reasonable skill, care and diligence to ensure that lists of defects are issued at the appropriate time under the Contract.

RIBA Stage 6 - Handover & Close Out

- In liaison with the other members of the Project Team and the Contractor, undertake tasks listed in the Handover Strategy, provide the Client with a Health & Safety file, and Operations & Maintenance file, and set of record drawings for the project.
- Exercise reasonable skill, care and diligence to ensure that the Contractor provides the Client with a set of record drawings, maintenance manuals and detailed instructions on the operation and maintenance of the building services generally, as well as appropriate training on new or modified plant and systems.
- Advise the Client on the resources and skills required to operate and maintain the completed Works. Make recommendations on the timing of their appointment or on the need for any maintenance agreements.
- Assist the Project Manager to issue a list of defects to the Contractor at the appropriate time in accordance with the terms of the Works contract.
- Assist the Project Manager to ensure that the Contractor rectifies the defects within an agreed time
- Liaise with the other members of the Project Team regarding final valuation of the Works.
- Liaise with other members of the Project Team to assist the issue of the Final Certificate.
- Within 12 months of handover, participate in a workshop review of the project to assess Project Performance and to agree lessons learned and positive/negative aspects of the design and construction that will contribute to improvements on future projects.
- Provide updated Project Information if necessary.
- Review and respond to any reported defects during the defects liability period and advise of cause and proposed remedial works so that the Contractor is instructed accordingly.
- At expiry of the defects liability period, carry out an inspection of the project works and compile a final list of coordinated defects for rectification under the contract. Issue such list to the Project Manager and re-inspect once corrective works have been undertaken by the Contractor. Confirm satisfactory completion of the works to enable the issue of the Making Good Defects certificate and Final Certificate for the project.

2.7 LIGHTING DESIGNER

2.7.1 Role, Scope, and Responsibilities

General RIBA Stage 2 - 4

- Engage with the Client, Architect, interior designer, and other stakeholders to define the lighting vision and design intent.
- Understand and respond to project typology, functional requirements, branding, and user experience.
- Propose lighting concepts that consider: Mood and atmosphere, Visual comfort, Architectural enhancement, Energy efficiency
- Develop lighting concept sketches, mood boards, and precedent imagery to communicate ideas.
- Translate the approved concept into a detailed, coordinated design.
- Determine lighting types, mounting methods, and control strategies, including: Ambient, task, accent, and decorative lighting, Emergency lighting (in collaboration with electrical engineers), Daylight integration, Scene setting and control systems (manual, DALI, DMX, KNX, etc.)
- Select luminaires and components based on: Luminous performance (lux levels, beam angle, UGR), Colour temperature and rendering (CCT, CRI/TM-30), Sustainability and energy consumption, Maintenance and access considerations
- Coordinate lighting design with: Architectural and interior layouts (ceilings, surfaces, finishes), Electrical infrastructure (circuits, loads, cable routing), Mechanical systems (avoiding ductwork conflicts, airflows), Structural constraints and mounting details
- Work closely with façade and landscape Consultants for external and feature lighting.
- Perform lighting calculations and simulations using specialist software (e.g., Dialux, Relux, AGi32) to assess: Lux levels and uniformity, Glare control, Energy performance (LENI, SLL guidelines)
- Provide renderings or visualisations to communicate the lighting effect in space.
- Design user-friendly and efficient lighting control systems to: Support scene-setting and automation, Integrate daylight and occupancy sensors, Provide manual override where required
- Coordinate with AV/IT Consultants to ensure integration and compatibility.
- Produce a full lighting specification, including: Fixture schedules with product data (manufacturer, wattage, beam angle, IP rating, etc.), Control strategy narrative, Load schedule and circuiting diagram (in collaboration with electrical engineer), Mounting and aiming instructions
- Ensure all selections meet relevant standards (e.g., BS 5266, CIBSE, SLL, WELL, BREEAM).
- Assist with lighting procurement by: Reviewing Contractor queries and value engineering options, Evaluating supplier alternatives and samples, Reviewing shop drawings and technical submissions
- Attend site meetings and provide: Aiming/focusing support for adjustable luminaires, Commissioning assistance and review of light scenes
- Participate in final aiming, testing, and commissioning of the lighting systems.
- Ensure all luminaires and controls are installed and operating as designed.
- Prepare a lighting control scene schedule and programming instructions.
- Deliver as-built drawings, operation manuals, and maintenance guidance.

RIBA Stage 5 - Construction

- In liaison with the other members of the Project Team, provide the Client with drawings or other documents necessary for entering into contract.
- Attend as necessary contract site meetings with other members of the Design Team and the Contractor.
- Allow for checking Contractors' drawings as necessary.

- Attend as necessary contract site meetings with other members of the Design Team and the Contractor.
- Make visits to the site as may be necessary generally to inspect and record the progress and quality of the Lighting work being executed by the Contractor and for the proper performance of the services.
- Undertake risk assessments and inform the Project Manager and Lead Designer of any updates required to the risk register. Advise of any risk mitigation measures that can be adopted.
- Undertake value management exercises throughout to ensure that the scheme remains on budget. Liaise with the cost manager and other Consultants to inform the costings identified for the project.
- Until completion of the project, report to the Lead Designer at monthly intervals on the progress of the Works and their compliance with the specification, highlighting any concerns regarding quality and identifying the need for corrective works or investigations to be undertaken to confirm their compliance with the specification.
- Exercise all reasonable skill, care and diligence to 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.
- Provide For Construction information to the Lead Designer in accordance with the programme to ensure fully coordinated information can be issued to the Contractor upon Contract Start Date.
- Input into the development of the Information Release Schedule and adhere to all timescales agreed therein to avoid impact on the Contractor's programme.
- Provide Request For Information responses throughout the construction period and ensure timely issue of the same to avoid impact on the Contractor's programme.
- Issue updated information in response to any changes arising from site.
- Review Contractor Design Proposals and provide response to the Lead Designer to coordinate and issue a full response within a timely manner to avoid impact on the Contractor's programme.
- Exercise all reasonable skill, care and diligence to ensure that rigorous quality management procedures are in place throughout the construction phase.
- Attend the regular meetings with the Contractor and the other members of the Project Team as necessary to monitor the progress of the Works and the production of design information to the Contractor.
- Provide 'As Builts' for inclusion into the Contractors proposed Operation and Maintenance Manuals/Health and Safety files.
- Advise the Lead Designer and Project Manager on the completion of the works and recommend whether in the services provider's opinion the works have been completed or not to an appropriate standard that will allow the Practical Completion or Section Completion certificate as appropriate.
- Undertake inspections and snagging and exercise all reasonable skill, care and diligence to ensure that lists of defects are issued at the appropriate time under the Contract.
- Oversee any commissioning tests to be carried out by the Contractor. Assess the results and exercise all reasonable skill, care and diligence to ensure that the tests are satisfactory and meet the performance and other requirements stipulated in the Works contact.
- If any commissioning tests fail to meet the requirements in any way, exercise all reasonable skill, care and diligence to ensure that, at no cost to the Client, the Contractor complies with his contractual obligations and rectifies any defects in the Works. Subsequently, arrange for such further tests to be undertaken until satisfactory results are obtained.
- Where relevant, issue certificates to the Contractor related to the completion of the works and or commissioning.

RIBA Stage 6 - Handover & Close Out

- Allow for focusing installed lighting scheme, including on all objects post object install and programming of installed control equipment.
- In liaison with the other members of the Project Team and the Contractor, undertake tasks listed in the Handover Strategy, provide the Client with a Health & Safety file, and Operations & Maintenance file, and set of record drawings for the project.
- Assist the Project Manager to issue a list of defects to the Contractor at the appropriate time in accordance with the terms of the Works contract.
- Assist the Project Manager to ensure that the Contractor rectifies the defects within an agreed time.
- Liaise with the other members of the Project Team regarding final valuation of the Works.
- Liaise with other members of the Project Team to assist the issue of the Final Certificate.
- Within 12 months of handover, participate in a workshop review of the project to assess Project Performance and to agree lessons learned and positive/negative aspects of the design and construction that will contribute to improvements on future projects.
- Provide updated Project Information if necessary.
- Review and respond to any reported defects during the defects liability period and advise of cause and proposed remedial works so that the Contractor is instructed accordingly.
- At expiry of the defects liability period, carry out an inspection of the project works and compile a final list of coordinated defects for rectification under the contract. Issue such list to the Project Manager and re-inspect once corrective works have been undertaken by the Contractor. Confirm satisfactory completion of the works to enable the issue of the Making Good Defects certificate and Final Certificate for the project.

2.8 ACCESSIBILITY CONSULTANT

2.8.1 Role, Scope, and Responsibilities

General Duties

- Provide Access Consultancy services as required for the project from inception to completion to cover the capital works and interpretation.
- Liaise with other Consultants on the project team and ensure that the services listed hereunder are fully coordinated with the services provided by those Consultants.
- Participate in the operation of an early warning system whereby the Access Consultant shall notify the Client, Project Manager, Lead Designer, other Consultants and Contractor as soon as the Access Consultant is aware of a matter that may adversely affect the project or its performance.
- Attend meetings with the Client, Project Manager, Quantity Surveyor, Lead Designer, other Consultants and Contractors as necessary for the performance of the services.
- Participate in value engineering, value management, sustainability and risk management workshops and exercises throughout the project duration.
- Participate in the Change Control Procedures and monitor design development against the Project Budget.
- The Access Consultant, Client and his/her representatives, other Consultants and all stakeholders will work closely together to foster a partnering culture. The culture will embody the principles of mutual trust and co-operation with an overall aim of delivering a successful project on time and to budget.

- Access Consultant shall exercise reasonable skill, care and diligence in the performance of the Services.
- Access Consultant shall have due regard to the operational status of the site.
- Access Consultant will be required to provide information to the Project Manager, the Consultants and to the Contractors from time to time as necessary to enable them to carry out their respective duties.
- Access Consultant will be required to give to the Client reasonable prior notice of and invite the Client to attend all meetings called in relation to the Project; attend all meetings called by the Client, the Project Manager and the Consultants in relation to the Project as appropriate/ reasonable.
- Access Consultant will be required to keep full and proper records of all key meetings and negotiations attended or conducted and make the same available for inspection by the Client forthwith on request.
- Advise Client and Consultants about the legal requirements of the Equality Act and other relevant legislation to ensure that the gallery conforms to all legislation and best practice relating to people with disabilities.
- Provide the Architect with information about specific access equipment and aids to enable them to progress their design.
- Provide the Architect with information for plans and other documents that are necessary to obtain Building Control Approval, HM Fire Service Inspectorate approval and all other Statutory Authorities approvals for the Project.
- Develop in conjunction with the Client an operational plan to enhance the access offer on site and/or agree operational solutions to access challenges where physical access is not feasible, possible or desirable.
- Support the Client in preparing funding applications in relation to their area of work.

RIBA Stage 1 – Preparation and Brief

- Receive the Client's initial brief from the Project Manager and provide such assistance as is necessary to identify possible options and expenditure limits.
- Undertake an initial appraisal of the site and constraints to inform the design of the scheme.
- Arrange with other members of the Project Team to undertake preliminary feasibility studies based on the Client's initial brief, discuss with the Client and obtain instructions.
- Liaise with the other members of the Project Team and undertake such further studies as may be necessary in order to submit proposals and options to the Client including an anticipated programme and costs and undertake all work necessary to obtain the Client approval to proceed on the basis of the Client approved design brief.
- Obtain the Project Manager's approval to proceed to the next RIBA Stage.

Development Phase (RIBA Stages 2 - 3)

- Assist the Client in appraising the quality of any access proposals prepared by the Design Team.
- Develop prioritised access improvement options and recommendations.
- Develop a prioritised action plan to achieve compliance with Part M of the Building Regulations as a minimum and help the Client to aspire toward Equality Act compliance where possible for implementation as part of the redevelopment and beyond.
- Co-operate with other members of the Design Team and provide information in support of cost control procedures.
- Liaise with the Quantity Surveyor to provide cost estimates for implementing access recommendations.

- Advise the Design Team on any implications for policy, practices and procedures in their design and report to the Client.
- Review the RIBA Stage 3 Design and produce a written report detailing the access issues that have been considered and resolved in RIBA Stage 3 with particular focus on how the redevelopment project promotes access. Access Consultant's Report to be submitted as part of Heritage Fund Round Two Application.
- Develop access statement for submission with the planning / statutory application(s).
- Obtain the Project Manager's approval to proceed to the next RIBA Stage.

RIBA Stage 4 - Technical Design

- Assist the Design Team in developing the design, production information and tender information, by giving advice on access issues and where necessary on the selection/ specification of specialist systems/ equipment to assist/ aid users with a disability.

RIBA Stage 5 - Construction

- Where necessary assist the Design Team in finalising the design and specification of the facility, by giving advice on access issues and where necessary providing advice on those areas not fully addressed prior to start on site that could have a significant impact the accessibility of the facility.
- Provide input and advice as necessary and pertinent to the Consultant's discipline to enable an application for building regulations approval to be made and agreed.

2.9 FIRE ENGINEER

2.9.1 Role, Scope, and Responsibilities

Scope and responsibilities:

General

- Provide Fire Engineering services as required for the project from inception to completion to cover all aspects of the project.
- Liaise with other Consultants on the project team and ensure that the services listed hereunder are fully coordinated with the services provided by those Consultants.
- Participate in the operation of an early warning system whereby the Fire Engineer shall notify the Client, Project Manager, Lead Designer, other Consultants and Contractor as soon as the Fire Engineer is aware of a matter that may adversely affect the project or its performance.
- Input to and coordinate with the Principal Designer role as defined by the CDM Regulations (2015) and provide design information and designer's risk assessments.
- Attend meetings with the Client, Project Manager, Quantity Surveyor, Lead Designer, other Consultants and Contractors as necessary for the performance of the services.
- Participate in value engineering, value management, sustainability and risk management workshops and exercises throughout the project duration.
- Participate in the Change Control Procedures and monitor design development against the Project Budget.

- The Fire Engineer, Client and his/her representatives, other Consultants and all stakeholders will work closely together to foster a partnering culture. The culture will embody the principles of mutual trust and co-operation with an overall aim of delivering a successful project on time and to budget.
- Perform the Services necessary for completion of the works in line with the project programme.
- Give to the Client reasonable prior notice of and invite the Client to attend all meetings called by the Consultant in relation to the Project; attend all meetings called by the Client, the Project Manager and the Other Consultants in relation to the Project as appropriate/ reasonable.
- Keep full and proper records of all key meetings and negotiations attended or conducted by the Consultant and make the same available for inspection by the Client forthwith on request.
- Deliver the Project in line with the Project Execution Plan (PEP) and report progress against the PEP baseline throughout.
- Perform such other duties as may reasonably be required by the Client to secure the completion of the Project.
- The Consultant shall, if requested to do so, assist the Client in respect of any claims or proceedings made in relation to any of the Other Consultants or the Contractors.

RIBA Stages 2-4

- Undertake an initial appraisal of the site and constraints to inform the design of the scheme.
- By the end of RIBA Stage 3, work with the Architect and Design Team to develop the broad principles of the fire strategy for the project, highlighting any areas where the design departs from conventional guidance and fire engineering solutions are required. Scope of service for this stage includes the following:
- Attend Design Team workshops to assess the design and develop the fire strategy concepts.
- Produce an outline Fire Strategy Safety Report, describing the design objectives and proposed solutions to the following aspects of fire safety (in each of these sections, the code recommendations would be identified. A design proposal would also be identified and any variation between the two highlighted. Where deviation from code would be likely to be necessary, the implications of this would be considered):
  - Means of escape – routes, distances, alternative escape, provision of refuges
  - Compartmentation and fire separation
  - Firefighting access and facilities
  - Smoke control
  - Firefighting facilities
  - Detection, alarm and suppression systems
  - Emergency management procedures and communication
  - Structural fire protection
  - External fire spread.
- Present the report to the Design Team and Client for discussion.
- Update the report to reflect design development and comments/ discussion with the Design Team and Client.
- Present the report to the Approving Authorities, including Building Control, to assist the Architect in gaining initial approval in principle for the fire strategy.
- Following the agreement of the key principles of the fire safety strategy, a fully detailed fire strategy is to be developed by the end of RIBA 4. This needs to expand the outline strategy to include all necessary details, including any supporting calculations, sketches and explanation required to enable the Architect to gain full approval of the scheme. This may include smoke modelling and detailed assessment of compartmentation requirements.

- The detailed fire strategy should reflect the ongoing design development, and the Consultant will be required to attend Design Team meetings as necessary to ensure that the fire strategy is fully understood and integrated into the design.
- Make recommendations to the Client on the need for specialist Contractors to design and execute any sections of the Works or for specialist suppliers to provide any materials or equipment and obtain the Client approval and take any action necessary to implement the Client decision.
- Undertake third party consultations and any Research and Development aspects as required.
- In liaison with the other members of the Project Team assist in the preparation of a cost plan based on the approved cost and the anticipated start and completion dates and, thereafter, monitor the development of the scheme design against the cost plan and report any anticipated difficulty to the Client including proposals for overcoming that difficulty and obtain the Client instructions in sufficient time to allow corrective action to be taken.
- Exercise all reasonable skill, care and diligence to 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 to rectify deficiencies.
- Identify any design changes through the design development phase clearly so that the costings for the scheme reflect the latest design. Follow the change control process that will be implemented by the Project Manager.
- Where the Client has indicated the possibility of a change to the agreed brief during the design phase, inform the Client of the cost and programme implications and obtain the Client instructions.
- Exercise all reasonable skill, care and diligence to ensure that life cycle costings and environmental assessment techniques are applied to the design, 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.
- Exercise all reasonable skill, care and diligence to ensure that the specifications prepared for the Works specifically exclude the use of materials accepted as being deleterious at the time and subsequently exercise all reasonable skill, care and diligence to ensure that such materials are not used in connection with the Works.
- In co-operation with the other members of the Project Team, complete the design of the Project up to tender stage.
- Align the design with the Trusts environmental and sustainability goals.
- In liaison with the other members of the Project Team, exercise all reasonable skill, care and diligence to ensure that all drawings, specifications, schedules, bills of quantities or other documents necessary for the placing of contracts are completed and are fully co-ordinated, are in accordance with the brief approved by the Client and are available on the programmed date.
- Exercise all reasonable skill, care and diligence to ensure that a pre-tender cost check is prepared based on the tender documentation.
- Undertake risk assessments and attend risk workshops.
- Undertake value management exercises.
- Obtain the Project Manager’s approval to proceed to the next RIBA Stage.

RIBA Stage 5 - Construction and RIBA 6 Handover

- During RIBA Stage 5 (Construction) to RIBA Stage 6 (Handover and Close Out), the Consultant will be required to provide support and assistance to the Design Team as required including enquiries from the local authorities.

2.10 SPECIALIST CONSULTANTS AND SURVEYORS

2.10.1 Role, Scope, and Responsibilities

Roles needed: Drainage Consultant, Planning Consultant, Landscape Consultant, Archaeology Fees, Other identified surveys.

Scope and responsibilities:

- To liaise with the MDDT and Lead Designer as required.
- Attend site, take accurate records, and share information.
- To liaise with other Consultants and/or Contractors where necessary.
- Attend project meetings if requested.
- Submit risk assessments and method statements as required by the Principal Designer
- Provide other services as required, such as technical detail, cost, and programme advice.
- Provide 'as built' information for H & S File and O & M Manual

2.11 SCHEDULE OF SERVICES – PHASE BREAKDOWN

2.11.1 Development Phase

The following services are expected:

RIBA Work Stage 2 to 3

Architect and Lead Designer

- Working closely with the Principal Designer from an early stage
- Assembling the MDDT and communicating information to them
- Providing consultancy advice to the Project Manager, Cost Consultant and St Osyth Priory & Parish Trust Trustees
- Developing Client's original brief to reflect any changes
- Providing outline drawing proposals (including Interior Design where appropriate)
- Monitor quality control with regard to collaborative design submissions.
- Liaising with the Local Authority and other statutory bodies. Making the necessary submissions for Planning permission and Building Regulations approval.
- Instigating work to discharge planning conditions and obtain all consents.
- Attend meetings and provide reports as necessary (pre contract)
- Participate in stakeholder and public consultation events where required.
- Assisting in the programming of project timescales
- Prepare a RIBA 3 level presentation for the mid-development phase review.

Principal Designer / CDM Co-ordinator

- Assist St Osyth Priory & Parish Trust in identifying, obtaining and collating pre-construction information.
- Provide pre-construction information to designers.
- Ensure as far as is reasonably practicable designers comply with their duties and cooperate with one another.
- Avoid risks.

- Evaluate risks which cannot be avoided.
- Combat risks at source.
- Develop a coherent prevention policy.

Structural Engineer

- Site investigation and analysis
- Preparation of report findings
- Structural calculations
- Detailed Structural Concept design drawings

Mechanical and Electrical Consultants

- Desktop studies and analysis of concept designs by MDDT
- 3D modelling
- Liaison with Mains Service Providers and Statutory Undertakers
- Guidance on proposed systems and layout advice
- Test and evaluate options.
- Preparation of drawings and production information

Specialist Consultants

- Site investigation and analysis
- Preparation of report findings
- Schedule of Advisory Works
- Quotations
- Programming

2.11.2 Delivery Phase

There is, however, no guarantee that Delivery Phase services will be required (especially if funded is not granted), and bidders should take account of this.

The following services are expected:

RIBA Stages 4 to 7 (please note, some aspects of RIBA 4 will need to be completed at risk of funding not being granted).

Architect and Lead Designer

- Development of drawings and specifications to RIBA level 4
- Production of information to support Contractor procurement process
- Oversee receipt of a minimum of three tenders for the Capital Works phase
- Provide value engineering support where necessary.
- Lead operational review for the Trust following any value engineering works
- Preparation and issue of construction drawings to the Contractor
- Undertake full Contract Administration
- Attend essential meetings and provide reports as necessary (post contract). Regular site-based presence is essential.

- Hand over all files and documents at Practical Completion
- Support the work of the Historian in Residence

Principal Designer

- Provide risk management to the Client team, MDDT and Lead Designer where possible. Escalate issues as required.
- Liaise with the Principal Contractor
- Keep full and proper records of all meetings and negotiations conducted in connection with this work.
- Provide Construction Phase Health and Safety File
- Provide and hand over completed Health and Safety File at end of Capital Works

Structural Engineer

- Development of early concepts through to detailed design
- Provision of technical advice, including guidance on materials
- Attendance at MDDT meetings as appropriate
- Site visits to monitor implementation of structural interventions.
- Provie ‘As Built’ drawings and maintenance advice.

Mechanical and Electrical Consultants

- Development of early concepts through to detailed design
- Provision of technical advice, including guidance on materials and apparatus
- Attendance at MDDT meetings as appropriate
- Site visits to monitor installation of new systems.
- Provide ‘As Built’ drawings and maintenance advice.

Specialist Consultants

- Provisional of technical advice, including guidance on materials
- Attendance at MDDT meetings as appropriate
- Site visit(s) as necessary to oversee specialist works.
- As Built drawings and maintenance advice

3.0 INSTRUCTIONS FOR TENDERING

3.1 GENERAL TENDERING INFORMATION

3.1.1 These instructions are designed to ensure that all Tenderers are given equal and fair consideration. It is important therefore that you provide all information asked for in the format and order specified in the tender documents. If you have any doubt as to what is required or will have difficulty in providing the information requested, please submit a question via tenders@stosythpriorytrust.org.uk

3.1.2 St Osyth Priory and Parish Trust reserves the right to contact and take up references. Tenderers are required to provide details of three references for work of similar scale and nature in the ITT submission.

3.1.3 Tenders shall be submitted in accordance with these instructions.

3.1.4 Tenders that do not comply with any mandatory requirement (i.e. where the words “shall” or “must” are used) will be rejected.

3.1.5 This ITT does not constitute an offer and St Osyth Priory & Parish Trust does not undertake to accept any tender. St Osyth Priory & Parish Trust reserves the right to accept a Tender in part, rather than in full.

3.1.6 Whilst the information contained in this ITT is believed to be correct at the time of issue neither St Osyth Priory & Parish Trust, nor its advisors, will accept any liability for its accuracy, adequacy or completeness nor will any express or implied warranty be given. This exclusion extends to liability in relation to any statement, opinion or conclusion contained in or any omission from this ITT (including its appendices) and in respect of any other written or oral communication transmitted (or otherwise available) to any Tenderer. This exclusion does not extend to any fraudulent misrepresentation made by or on behalf of St Osyth Priory and Parish Trust.

3.2 CONFIDENTIAL NATURE OF TENDER DOCUMENTATION

3.2.1 Documentation in relation to this Invitation to Tender and any Tenders received by St Osyth Priory and Parish Trust in response to it shall be treated as a private and confidential save where the disclosure is required by law.

3.2.2 Other than with professional advisers or sub-Contractors that need to be consulted with regards to the preparation of the Tender, Tenderers shall not:

a) Disclose that they have been invited to tender.

b) Discuss the Invitation or the Tender they intend to make.

c) Release any information relating to the ITT and/or the Tender that they intend to make.

d) Devise or amend the content of their Tender in accordance with any agreement or arrangement with any other organisation and/or person, other than in good faith with an organisation and/or person who is a proposed partner, supplier, consortium member or provider of finance.

e) Enter into any agreement or arrangement with any other organisation and/or person, other than in good faith with an organisation and/or person who is a proposed partner, supplier, consortium member, or provider of finance.

f) Enter into any agreement or arrangement with any other organisation and/or person that has the effect of prohibiting or excluding that person from submitting a Tender.

g) Canvas directly or indirectly with any other Tenderer, Member or Officer of St Osyth Priory and Parish Trust (including its Consultants and Contractors) in relation to this procurement.

h) Attempt to obtain information from any of the employees or agents of St Osyth Priory and Parish Trust or their advisors concerning another Tenderer or Tender.

i) Pass the ITT documents to any other organisation.

3.2.3 If a Tenderer does not observe the points above, St Osyth Priory & Parish Trust will reject their tender and may decide not to invite the Tenderer to tender for future work.

3.2.4 St Osyth Priory and Parish Trust will consider only bona fide bids, which do not refer to any other bid. It shall be entitled to disqualify any application where collusive bidding is suspected.

3.3 CONDITIONS

3.3.1 St Osyth Priory and Parish Trust is not liable by way of contract, for any work undertaken or cost incurred by any respondent in connection with the preparation, submission, or assessment of any tender. The Tenderer is responsible for independently checking and satisfying himself/herself of the accuracy of the information provided in this brief.

3.3.2 St Osyth Priory and Parish Trust reserves the right to retain all submission material, including that prepared for presentation purposes, and display or otherwise utilise the material as it may consider appropriate, at no cost to them.

3.3.3 Subject to satisfactory performance and funding being secured for the Delivery Phase, the Project Management and Cost Consultant team will also be commissioned through this tender to manage the implementation of all landscape and building works in the Delivery Phase. **There is, however, no guarantee that delivery stage services will be required, and bidders should take account of this.**

3.4 COMMUNICATION AND QUESTIONS

3.4.1 All formal communications (including, but not limited to, clarification questions, appointments for site visits and the submission of Tenders) to St Osyth Priory and Parish Trust are to be made in writing using tenders@stosythpriorytrust.org.uk

3.4.2 It is the Tenderer's responsibility to ensure any verbal queries or clarifications they generate are confirmed in writing via email. In the event of any misunderstandings reliance on verbal communications will not be permissible.

3.4.3 If a Tenderer is in doubt as to the interpretation of any part of the ITT, or if they consider that any of its requirements are ambiguous or conflict with any other requirements, they should contact St Osyth Priory & Parish Trust via email.

3.4.4 No representation, explanation or statement made to the Tenderer or anyone else by or on behalf, or purportedly on behalf of St Osyth Priory and Parish Trust as to the meaning of the Tender documents, or otherwise in explanation as aforesaid, shall be binding on St Osyth Priory & Parish Trust in the exercise of its obligations under a subsequently awarded contract.

3.4.5 Should any Tenderer wish to clarify the interpretation of any part of the ITT requirements, they may submit clarification questions via email system. This opportunity exists until the deadline of 6th May 2025 after which no undertaking is given to reply. St Osyth Priory & Parish Trust will use their best endeavours to respond as a matter of assistance to the Tenderer, but it shall not be construed to add to, modify or take away from the meaning and intent of the proposed contract and/or the obligations and liabilities of the Tenderer. Tenderers' messages are managed in standard business hours only, Monday to Friday.

3.4.6 Where an enquiry is beneficial to all Tenderers, both an anonymised copy of the clarification question and the response will be communicated to all Tenderers. If a Tenderer wishes St Osyth Priory & Parish Trust to treat a clarification as confidential and not issue a response to all Tenderers it must state this when submitting the clarification question. If, in the opinion of St Osyth Priory & Parish Trust, the clarification is not confidential, St Osyth Priory & Parish Trust will inform the Tenderer, and the Tenderer will have an opportunity to withdraw it. If the clarification is not withdrawn, both the question and response will be sent to other Tenderers anonymously.

3.4.7 St Osyth Priory & Parish Trust reserves the right (but shall not be obliged) to seek clarification of any aspect of a Tender during the evaluation phase where necessary for the purposes of carrying out a fair evaluation. Tenderers are asked to respond to such requests promptly.

3.5 EVALUATION CRITERIA

3.5.1 The final contract award will be to the Most Economically Advantageous Tender. The tender evaluation criteria will be based on a combination of Quality and Price which has been specified and weighted in the table below.

3.5.2 Once all evaluations have been completed St Osyth Priory & Parish Trust will add the quality and price scores together to provide a total score for each Tenderer. The Tenderer with the highest total score will be recommended to deliver the service.

	Criteria	Weighting
	Quality - 70%	
1	3 x Case studies demonstrating relevant experience	30%
2	Key project personnel relevant experience	15%
3	Project methodology (Including methodology, community and stakeholder engagement)	20%
4	Social Value	5%
	Price - 30%	
	Fee proposal	30%
Total		**100%**

3.6 TENDER CONTENTS AND SCORING METHODOLOGY

3.6.1 What to include

For additional guidance for how St Osyth Priory & Parish Trust would like you to respond, please see the recommendations below. Responses should be sent as an emailed PDF attachment.

1. **Case Studies:** To showcase yourself and/or your organisation, please include case studies covering the elements of the Role, Scope and Responsibilities as well as the schedule of services; this helps to demonstrate clearly how your previous experience contributes to your value proposition.

2. **Details of who will be involved, including Bios and CVs:** In addition to this, providing an overview of your proposed team's individual bios, their responsibilities and brief examples of relevant past work is necessary to demonstrate how well you are suited to delivering the proposed works. It will be essential that the proposed staff can only be replaced with someone of equal experience due to our Due Diligence polices.

3. **Community and Stakeholder Engagement:** St Osyth Priory and Parish Trust is an organisation that works with, and across, several varied stakeholders. Please outline how you would engage those stakeholders in this project.

4. **Methodology and Timeline:** In addition, please provide a methodology, timeline & order of outputs, including an estimated time on site. Tell us how you would propose delivering against the brief, and why. Please indicate how much site-based presence is expected, especially during the construction phase.

5. **References:** Please provide three referees' details and a description of similar contracts delivered over the past five years.

6. **Insurance:** Please confirm that you have:
    a. Employer's liability insurance
    b. £5m Professional indemnity insurance, for every claim
    c. £5m Public liability insurance

    Proof of insurance will be required from the successful bidder.

7. **Social Value:** Finally, to strengthen your response further still, please provide examples of your social value.

3.6.2 ITT – Quality (70%)

This element equates to 70% of the full mark and the scoring of each element of the requirement will use the scoring system as shown in table below.

Method Statements Question	Scoring Range	Weighting
3 x Case studies demonstrating relevant experience	0 to 5	30%
Key project personnel relevant experience	0 to 5	15%
Project methodology (Including methodology, community and stakeholder engagement)	0 to 5	20%
Social Value	0 to 5	5%

The following scoring mechanism will be used to score the quality method statements responses:

Score	Rationale/Judgment	General Description
0	The response fails to comply with the requirements of this ITT or is otherwise incapable of evaluation.	Wholly unsatisfactory
1	The response does not demonstrate an understanding of St Osyth Priory & Parish Trust's requirements as defined in this ITT and is incomplete or is otherwise unconvincing in significant respects.	Unsatisfactory
2	The response demonstrates only a limited understanding of St Osyth Priory & Parish Trust's requirements as defined in this ITT, lacks detail or is not convincing in some respects	Cause for concern
3	The response demonstrates an understanding of, and compliance with St Osyth Priory & Parish Trust's requirements as defined in this ITT.	Acceptable
4	The response indicates that the bidder would effectively deliver the project in accordance with St Osyth Priory and Parish Trust's requirements. The response is convincing, detailed and demonstrates a good understanding of St Osyth Priory & Parish Trust's requirements as defined in this ITT.	Good
5	The response indicates that the bidder would effectively deliver the project in accordance with St Osyth Priory and Parish Trust's requirements. The response is entirely convincing, highly detailed and demonstrates a complete understanding of and compliance with St Osyth Priory and Parish Trust's requirements as defined in this ITT.	Excellent

In order to ensure that the successful Tenderer has met minimum quality standards, any Tenderer whose score includes two or more answers that are awarded a score of 2 or less, or any awarded of a score of 0, will be deemed to have failed minimum quality standards and will be deselected from the tender process.

3.6.3 ITT – Price (30%)

The pricing schedules submitted will be worth 30% of the overall marks.

Please note that although the Delivery Phase is subjected to funding, please include both Development Phase and Delivery Phase in your proposal as breakdowns of each RIBA stage.

The Tenderer with the lowest price (Development Phase plus Delivery Phase) will receive the maximum points available.

Each remaining Tenderers' price will be awarded a score based on the percentage difference between their price and that of the most competitive price:

Score = Lowest Tender Sum / Contractors Tender sum x Max. Weighted Available Score
Please see an illustrated example of the calculation methodology below for clarity:

Tenderer A	**Tenderer B**	**Tenderer C**	**Tenderer D**
15,849	17,094	25,497	31,246
30%	27.81%	18.64%	15.21%

A = 15,849 and gets 30%

A divided by B = 15,849/17,094 = 0.927

Proportional score 30 x 0.927 = 27.81%

3.7 CLARIFICATION MEETING / PRESENTATIONS

3.7.1 As part of the tender evaluation process bidders may be required to make a presentation or attend a clarification meeting online. Bidders will be notified as soon as possible if they are required to give a presentation or attend a clarification meeting. Following the presentations /interviews the scores attained in the written submission may be moderated.

3.8 INDICATIVE PROCUREMENT TIMETABLE

3.8.1 Below is a table of indicative timescales for the procurement process. Please note that some of these dates may be subject to change. As time is of the essence for this project, only Contractors who can meet the timetable set out below should submit a tender for this service contract.

MILESTONE	TARGET DATE
Invitation to Tender (ITT) available online	5th June 2025
Formal Site Visit	TBC 17th – 19th June 2025
Deadline for receipt of ITT Clarification Questions	26th June 2025
Tender returns: ITT Submission Deadline	3rd July 2025
Tender Evaluation Period	4th July – 14th July 2025
Clarification Meeting	8th – 10th July 2025 (TBC)
Contract Award Recommendation	21st July 2025
Notify successful / unsuccessful bidders	21st July 2025
Confirmation of contract award	21st July 2025

3.8.2 The above dates are for guidance only and may be amended by written notice by and at the sole discretion of St Osyth Priory and Parish Trust.

3.8.3 By submitting a tender for the provision of the Services a Tenderer confirms that it is able to meet the dates above including the provision of all necessary personnel, facilities and information to deliver the Services.

Appendix A - Form of Tender

Appendix A

Form of Tender

(Please complete and return with your tender response)

Form Of Tender

Project: St Osyth Priory and Parish Trust

Professional Service: Multi-Disciplinary Design Team

Name of Tenderer: .....

Please complete the following:

1. Fee Offer
    I. Fee
    II. Resources
    III. Impact of Budget Increases

2. Day Rates

3. Expenses and Disbursements

4. Offer Period

5. Declaration

6. Certificate of Bona Fide Tendering

I/ We, the undersigned, do hereby offer to execute and complete the above professional services in strict accordance with the Appointment Brief and the Schedule of Services for the lump sum and percentage fees outlined below. For clarity, fee basis to be as follows unless otherwise stated:

- Development Stage August 2025 – August 2026
- Delivery Stage January 2027 – March 2030 (including rectification period)

I. Fee

Lump Sum Fee – Development Stage

Development Stage (RIBA Stage 2) £ .....

Development Stage (RIBA Stage 3) £ .....

Percentage Fee – Delivery Stage

Delivery Stage (RIBA Stage 4 – 7)
Traditional single stage procurement with contract value of £2.908m excl. VAT, contingency and inflation .....**%**

Delivery Stage (RIBA Stage 4 – 7)
Traditional two stage procurement with contract value of £2.908m excl. VAT, contingency and inflation .....**%**

Delivery Stage (RIBA Stage 4 – 7)
Traditional single stage procurement with two contracts with total value of £2.908m excl. VAT, contingency and inflation .....**%**

Fee Instalments

Stage and Lump Sum Fee	**Fee £**
RIBA Stage 2 – Architect incl. Conservation Advisor	
RIBA Stage 2 – Principal Designer	
RIBA Stage 2 – Contract Administrator	
RIBA Stage 2 – Structural Engineer	
RIBA Stage 2 – Mechanical and Electrical Engineer	
RIBA Stage 2 – Lighting Designer	
RIBA Stage 2 – Accessibility Consultant	
RIBA Stage 2 – Fire Engineer	
RIBA Stage 2 – Specialist Consultants	
RIBA Stage 2 – Management and Maintenance Plan	
RIBA Stage 2 – Conservation Management Plan	
Total	**£**

Stage and Lump Sum Fee Cont'd	**Fee £**
RIBA Stage 3 – Architect incl. Conservation Advisor	
RIBA Stage 3 – Principal Designer	
RIBA Stage 3 – Contract Administrator	
RIBA Stage 3 – Structural Engineer	
RIBA Stage 3 – Mechanical and Electrical Engineer	
RIBA Stage 3 – Lighting Designer	
RIBA Stage 3 – Accessibility Consultant	
RIBA Stage 3 – Fire Engineer	
RIBA Stage 3 – Specialist Consultants	
RIBA Stage 3 – Management and Maintenance Plan	
RIBA Stage 3 – Conservation Management Plan	
Total	**£**

Traditional Single Stage Procurement

Percentage Fee	**% of Construction Cost @** £2.908m excl. VAT, contingency and inflation
RIBA Stage 4	
RIBA Stage 5	
RIBA Stage 6	
RIBA Stage 7	
Total	**%**

Traditional Two Stage Procurement

Percentage Fee	**% of Construction Cost @** £2.908m excl. VAT, contingency and inflation
RIBA Stage 4	
RIBA Stage 5	
RIBA Stage 6	

RIBA Stage 7	
Total	**%**

Traditional Single Stage Procurement but with Two Contracts

Percentage Fee	**% of Construction Cost @** £2.908m excl. VAT, contingency and inflation
RIBA Stage 4	
RIBA Stage 5	
RIBA Stage 6	
RIBA Stage 7	
Total	**%**

Note that the appointed consultant shall produce a monthly payments schedule to be agreed with the Project Manager which reflects these figures (on a pro-rata adjustment).

II. Resources (Development Stage Only)

Architect incl. Conservation Advisor	**Resources (in Resource Days)**				
	Director/ Partner	**Senior Consultant**	**Consultant**	**Assistant/ Technician**	**Total Resource Days**
RIBA Stage 2					
RIBA Stage 3					
Resource Sub Totals (Resource Days)					
Total Resource (Resource Days)					

Structural Engineer	**Resources (in Resource Days)**				
	Director/ Partner	**Senior Consultant**	**Consultant**	**Assistant/ Technician**	**Total Resource Days**
RIBA Stage 2					
RIBA Stage 3					

Resource Sub Totals (Resource Days)					
Total Resource (Resource Days)					

Principal Designer	**Resources (in Resource Days)**				
	Director/ Partner	**Senior Consultant**	**Consultant**	**Assistant/ Technician**	**Total Resource Days**
RIBA Stage 2					
RIBA Stage 3					
Resource Sub Totals (Resource Days)					
Total Resource (Resource Days					

Contract Administrator	**Resources (in Resource Days)**				
	Director/ Partner	**Senior Consultant**	**Consultant**	**Assistant/ Technician**	**Total Resource Days**
RIBA Stage 2					
RIBA Stage 3					
Resource Sub Totals (Resource Days)					
Total Resource (Resource Days)					

Structural Engineer	**Resources (in Resource Days)**				
	Director/ Partner	**Senior Consultant**	**Consultant**	**Assistant/ Technician**	**Total Resource Days**
RIBA Stage 2					
RIBA Stage 3					
Resource Sub Totals (Resource Days)					
Total Resource (Resource Days)					

Mechanical and Electrical Engineer	Resources (in Resource Days)				
	Director/ Partner	Senior Consultant	Consultant	Assistant/ Technician	Total Resource Days
RIBA Stage 2					
RIBA Stage 3					
Resource Sub Totals (Resource Days)					
Total Resource (Resource Days)					

Lighting Designer	Resources (in Resource Days)				
	Director/ Partner	Senior Consultant	Consultant	Assistant/ Technician	Total Resource Days
RIBA Stage 2					
RIBA Stage 3					
Resource Sub Totals (Resource Days)					
Total Resource (Resource Days)					

Accessibility Consultant	Resources (in Resource Days)				
	Director/ Partner	Senior Consultant	Consultant	Assistant/ Technician	Total Resource Days
RIBA Stage 2					
RIBA Stage 3					
Resource Sub Totals (Resource Days)					
Total Resource (Resource Days)					

Fire Engineer	Resources (in Resource Days)				
	Director/ Partner	Senior Consultant	Consultant	Assistant/ Technician	Total Resource Days
RIBA Stage 2					
RIBA Stage 3					

Resource Sub Totals (Resource Days)					
Total Resource (Resource Days)					

Specialist Consultants	**Resources (in Resource Days)**				
	Director/ Partner	**Senior Consultant**	**Consultant**	**Assistant/ Technician**	**Total Resource Days**
RIBA Stage 2					
RIBA Stage 3					
Resource Sub Totals (Resource Days)					
Total Resource (Resource Days)					

Management and Maintenance Plan	**Resources (in Resource Days)**				
	Director/ Partner	**Senior Consultant**	**Consultant**	**Assistant/ Technician**	**Total Resource Days**
RIBA Stage 2					
RIBA Stage 3					
Resource Sub Totals (Resource Days)					
Total Resource (Resource Days)					

Conservation Management Plan	**Resources (in Resource Days)**				
	Director/ Partner	**Senior Consultant**	**Consultant**	**Assistant/ Technician**	**Total Resource Days**
RIBA Stage 2					
RIBA Stage 3					
Resource Sub Totals (Resource Days)					
Total Resource (Resource Days)					

III. Impact of Budget Increase

Please confirm the impact on fees if the scope remains the same but the overall estimated budget for works increases by 20%:

……

……

……

2.0 Day Rates

Consultant	Rate (£/day)			
	Director/ Partner	**Senior Consultant**	**Consultant**	**Assistant/ Technician**
Architect incl. Conservation Advisor				
Principal Designer				
Contract Administrator				
Structural Engineer				
Mechanical and Electrical Engineer				
Lighting Designer				
Accessibility Consultant				
Fire Engineer				
Specialist Consultants				
Management and Maintenance Plan				
Conservation Management Plan				

The above day rates will be utilised to negotiate any additional works that may be required if deemed to be beyond the reasonable scope of the works specified.

Your fee offer and all day rates are to be based on a 7.5 hour day and are to include allowance for disbursements but to exclude VAT.

3.0 Expenses and Disbursements

The fee offer is to include all expenses and disbursements (including printing charges). The percentage allowed for expenses within the fee offer above is _____ %

4.0 Offer Period

This tender/offer is to remain open for a period of 16 weeks from the date fixed to the return of tenders.

5.0 Declaration

Dated this ..... day of .....

Name of the lead firm or company .....

Address .....

.....

.....

Contact Tel Nr .....

Contact Fax Nr .....

Contact E-mail address .....

Signature .....

Name .....

Capacity in which sign .....

No undertaking is given to accept the lowest or any tender.

6.0 Anti-Fraud and Bribery Statements

Certificate of Non Canvassing

I/We hereby certify that I/We have not canvassed or solicited any Member, Officer, Employee, Agent or Contractor of the Business in connection with the award of this Bid or any other Bid or proposed Bid for the Services and that no person employed by me/us or acting on my/our behalf has committed any such act.

I/We further hereby undertake that I/We will not in the future canvass or solicit any Member, Officer, Employee, Agent or Contractor the Business in connection with the award of this or any other Bid or proposed Bid for the provision of Services and that no person employed by me/us or acting on my/our behalf will commit any such act.

I/ We acknowledge that if we have acted or act in contravention of this Certificate of Non Canvassing then the Business shall be entitled to reject our response to this invitation to bid, or any subsequent bid, or after award of any contract pursuant to this bid process may rescind that contract, and that if such rejection or rescission occurs we will indemnify the Business in full against all loss and expenses arising out of or in connection with such rejection or rescission

Form Completed by:

Signed(1):_____

Status:_____

Signed(2):_____

Status:_____

For and on behalf of: _____

Date:_____

Conditions of Bona Fide Bid

We certify that this is a bona fide bid, intended to be competitive and that we have not fixed or adjusted the amount of the bid or the rates and prices quoted by or under or in accordance with any agreement or arrangement with any other person.

We also certify that we have not done and undertake that we will not do at any time any of the following acts:

- Communicating to a person other than the Business the amount or approximate amount of our proposed Bid (other than in confidence in order to obtain quotations necessary for the preparation of the Bid or for any insurance purposes);
- Entering into any agreement or arrangement with any other person that he shall refrain from bidding or as to the amount of any bid to be submitted;
- Offering or agreeing to pay or give or paying or giving any sum of money, inducement or valuable consideration directly or indirectly to any person for doing or having done or causing or having caused to be done in relation to any other Bid or proposed Bid for the Services any act or omission;
- commit an offence under the Prevention of Corruption Acts 1889 to 1916;
- commit an offence under the Bribery Act 2010.

In this certificate, the word “person” includes any person, body or association, corporate or unincorporated and “agreement” includes any arrangement whether formal or informal and whether legally binding or not.

We acknowledge that if we have acted or act in contravention of these Conditions of Bona Fide Bid then the Business shall be entitled to reject our bid, or after award of any contract pursuant to this bid process may rescind that contract, and that if such rejection or rescission occurs we will indemnify the Business in full against all loss and expense arising out of or in connection with such rejection or rescission.

Form Completed by:

Signed(1):_____

Status:_____

Signed(2):_____

Status:_____

For and on behalf of:

_____

Date: _____

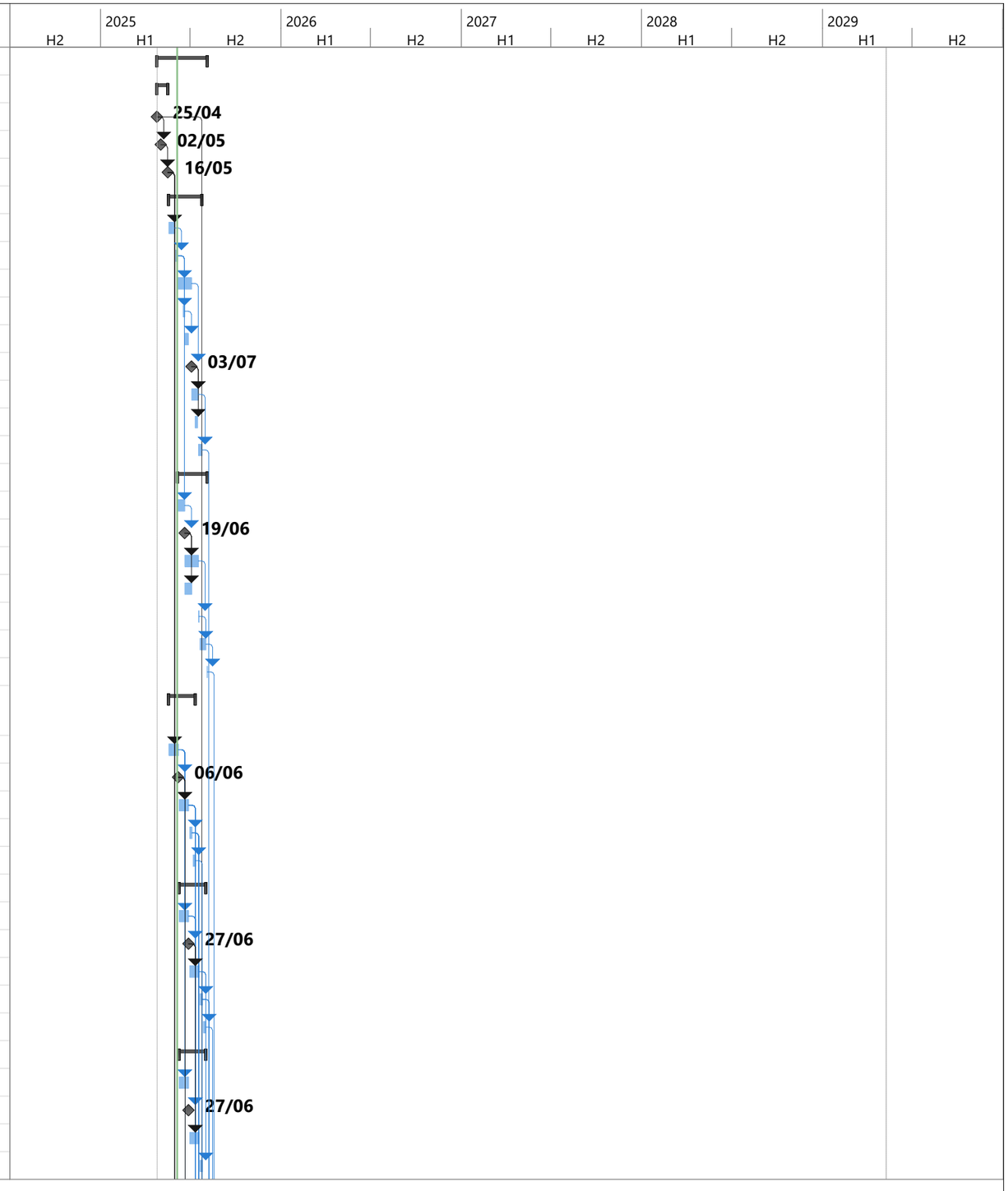
Appendix B - Photographs

Photographs 16/05/2025

The Tithe Barn

Appendix C - Programme

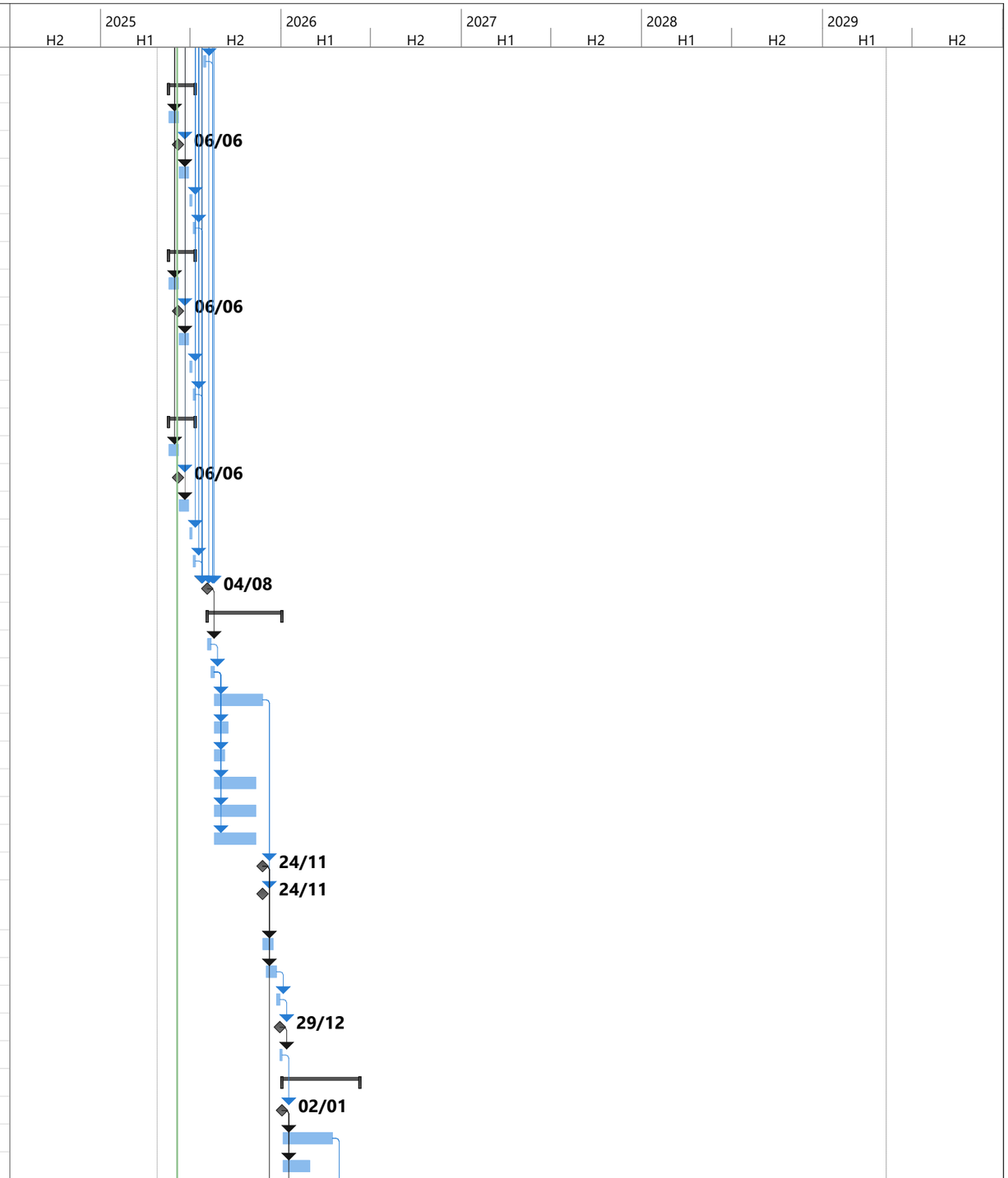
ID	Task Mode	Task Name	Duration	Start	Finish
1		**Project Team Procurement**	**72 days?**	**Fri 25/04/25**	**Mon 04/08/25**
2		**Project Manager & QS**	**16 days**	**Fri 25/04/25**	**Fri 16/05/25**
3		Appointment	0 days	Fri 25/04/25	Fri 25/04/25
4		Kick off meeting	0 days	Fri 02/05/25	Fri 02/05/25
5		Site Visit	0 days	Fri 16/05/25	Fri 16/05/25
6		**Multi-disciplinary design team**	**49 days**	**Mon 19/05/25**	**Thu 24/07/25**
7		Prepare Tender Package	2 wks	Mon 19/05/25	Fri 30/05/25
8		Issue ITT	4 days	Mon 02/06/25	Thu 05/06/25
9		Tender period	4 wks	Fri 06/06/25	Thu 03/07/25
10		Site Visit	3 days	Tue 17/06/25	Thu 19/06/25
11		Deadline for receiving clarifications	5 days	Fri 20/06/25	Thu 26/06/25
12		Tender deadline	0 days	Thu 03/07/25	Thu 03/07/25
13		Evaluation	2 wks	Fri 04/07/25	Thu 17/07/25
14		Clarification Meetings	3 days	Fri 11/07/25	Tue 15/07/25
15		Appointment	5 days	Fri 18/07/25	Thu 24/07/25
16		**Interpretation and Story Telling Consultant**	**42 days?**	**Fri 06/06/25**	**Mon 04/08/25**
17		Prepare Tender Pack	2 wks	Fri 06/06/25	Thu 19/06/25
18		Issue Tender Pack	0 days	Thu 19/06/25	Thu 19/06/25
19		Tender period	4 wks	Fri 20/06/25	Thu 17/07/25
20		Deadline for receiving clarifications	10 days	Fri 20/06/25	Thu 03/07/25
21		Tender deadline	1 day?	Fri 18/07/25	Fri 18/07/25
22		Evaluation and clarification meeting	2 wks	Mon 21/07/25	Fri 01/08/25
23		Appointment	1 day?	Mon 04/08/25	Mon 04/08/25
24		**Activity Plan, Community Consultation & Co-Production**	**40 days**	**Mon 19/05/25**	**Fri 11/07/25**
25		Prepare Tender Pack	3 wks	Mon 19/05/25	Fri 06/06/25
26		Issue Tender Pack	0 days	Fri 06/06/25	Fri 06/06/25
27		Tender period	3 wks	Mon 09/06/25	Fri 27/06/25
28		Evaluation and Interviews	1 wk	Mon 30/06/25	Fri 04/07/25
29		Appointment	5 days	Mon 07/07/25	Fri 11/07/25
30		**Business Plan**	**40 days**	**Mon 09/06/25**	**Fri 01/08/25**
31		Prepare Tender Pack	3 wks	Mon 09/06/25	Fri 27/06/25
32		Issue Tender Pack	0 days	Fri 27/06/25	Fri 27/06/25
33		Tender period	3 wks	Mon 30/06/25	Fri 18/07/25
34		Evaluation and Interviews	1 wk	Mon 21/07/25	Fri 25/07/25
35		Appointment	5 days	Mon 28/07/25	Fri 01/08/25
36		**Evaluation, Economic and Social Impact**	**40 days**	**Mon 09/06/25**	**Fri 01/08/25**
37		Prepare Tender Pack	3 wks	Mon 09/06/25	Fri 27/06/25
38		Issue Tender Pack	0 days	Fri 27/06/25	Fri 27/06/25
39		Tender period	3 wks	Mon 30/06/25	Fri 18/07/25
40		Evaluation and Interviews	1 wk	Mon 21/07/25	Fri 25/07/25



Project: R4390 SOPPT Program
Date: Thu 05/06/25

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

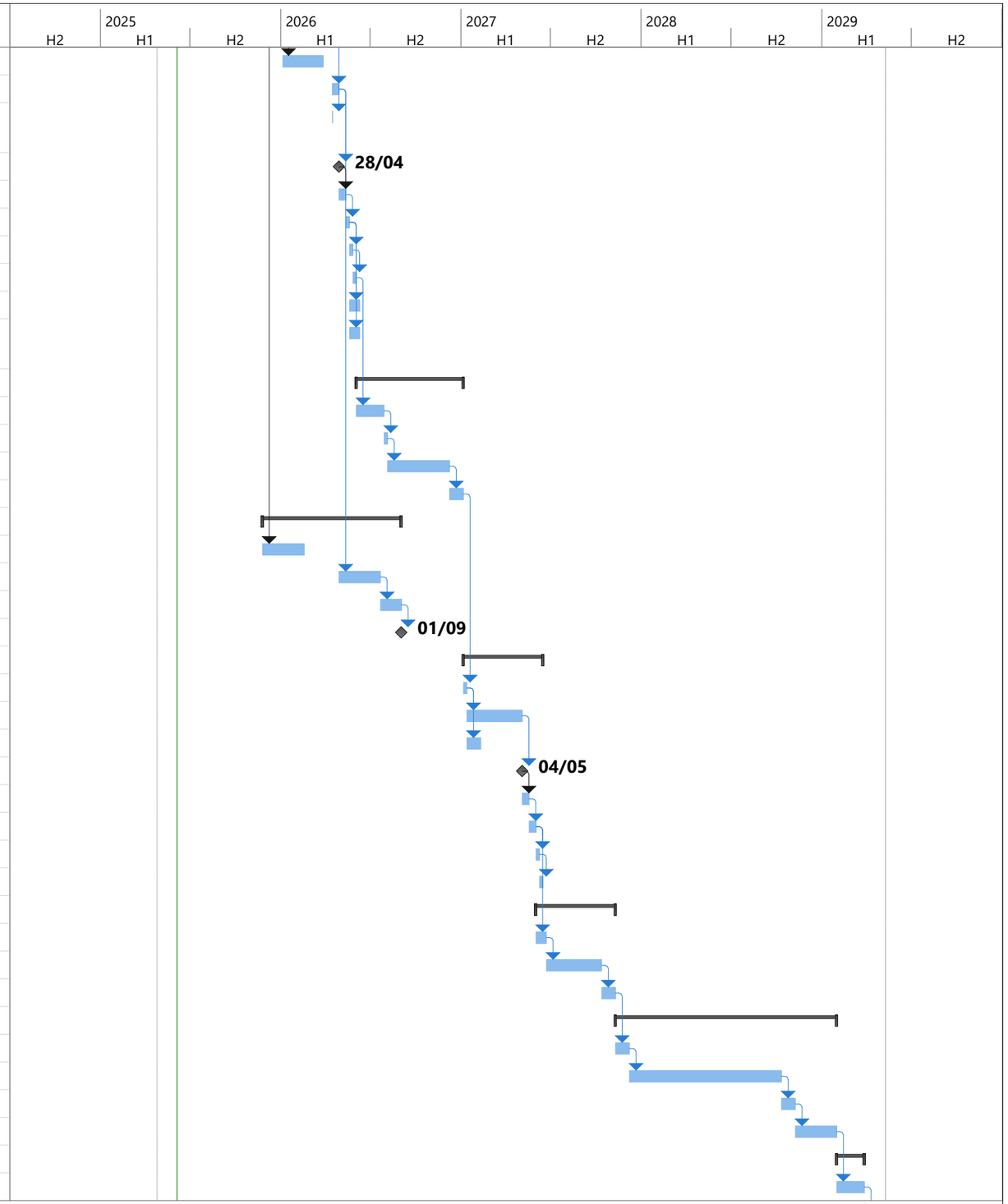
ID	Task Mode	Task Name	Duration	Start	Finish
41		Appointment	5 days	Mon 28/07/25	Fri 01/08/25
42		**Fundraising Consultant**	**40 days**	**Mon 19/05/25**	**Fri 11/07/25**
43		Prepare Tender Pack	3 wks	Mon 19/05/25	Fri 06/06/25
44		Issue Tender Pack	0 days	Fri 06/06/25	Fri 06/06/25
45		Tender period	3 wks	Mon 09/06/25	Fri 27/06/25
46		Evaluation and Interviews	1 wk	Mon 30/06/25	Fri 04/07/25
47		Appointment	5 days	Mon 07/07/25	Fri 11/07/25
48		**Community Engagement Officer**	**40 days**	**Mon 19/05/25**	**Fri 11/07/25**
49		Prepare Recruitment Pack	3 wks	Mon 19/05/25	Fri 06/06/25
50		Issue Recruitment Pack	0 days	Fri 06/06/25	Fri 06/06/25
51		Tender period	3 wks	Mon 09/06/25	Fri 27/06/25
52		Evaluation and Interviews	1 wk	Mon 30/06/25	Fri 04/07/25
53		Appointment	5 days	Mon 07/07/25	Fri 11/07/25
54		**Historian**	**40 days**	**Mon 19/05/25**	**Fri 11/07/25**
55		Prepare Recruitment Pack	3 wks	Mon 19/05/25	Fri 06/06/25
56		Issue Recruitment Pack	0 days	Fri 06/06/25	Fri 06/06/25
57		Tender period	3 wks	Mon 09/06/25	Fri 27/06/25
58		Evaluation and Interviews	1 wk	Mon 30/06/25	Fri 04/07/25
59		Appointment	5 days	Mon 07/07/25	Fri 11/07/25
60		Project Team Appointments Complete	0 days	Mon 04/08/25	Mon 04/08/25
61		**RIBA Stage 2**	**109 days**	**Tue 05/08/25**	**Fri 02/01/26**
62		Mobalisation	5 days	Tue 05/08/25	Mon 11/08/25
63		RIBA Stage 2 kick off meeting	5 days	Tue 12/08/25	Mon 18/08/25
64		Concept Design Development	3.5 mons	Tue 19/08/25	Mon 24/11/25
65		Client Briefing Workshops	1 mon	Tue 19/08/25	Mon 15/09/25
66		Clearance of site for surveys and site investigations	3 wks	Tue 19/08/25	Mon 08/09/25
67		Surveys and opening up works	3 mons	Tue 19/08/25	Mon 10/11/25
68		Consultation, Focus Groups	3 mons	Tue 19/08/25	Mon 10/11/25
69		Historical research	3 mons	Tue 19/08/25	Mon 10/11/25
70		RIBA Stage 2 Reports issued for costing	0 days	Mon 24/11/25	Mon 24/11/25
71		Business Plan, Activity Plan, Conservation Management Plan issues	0 days	Mon 24/11/25	Mon 24/11/25
72		RIBA Stage 2 Cost plan issued	3 wks	Tue 25/11/25	Mon 15/12/25
73		Value Engineering (if required)	3 wks	Tue 02/12/25	Mon 22/12/25
74		Presentation to SOPPT	1 wk	Tue 23/12/25	Mon 29/12/25
75		Feedback issued	0 days	Mon 29/12/25	Mon 29/12/25
76		NLHF approval to proceed to RIBA Stage 3	4 days	Tue 30/12/25	Fri 02/01/26
77		**RIBA Stage 3**	**112 days**	**Fri 02/01/26**	**Tue 09/06/26**
78		RIBA Stage 3 kick off meeting	0 days	Fri 02/01/26	Fri 02/01/26
79		Detailed Design Development	3.6 mons	Mon 05/01/26	Tue 14/04/26
80		Surveys and opening up works	2 mons	Mon 05/01/26	Fri 27/02/26



Project: R4390 SOPPT Program
Date: Thu 05/06/25

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

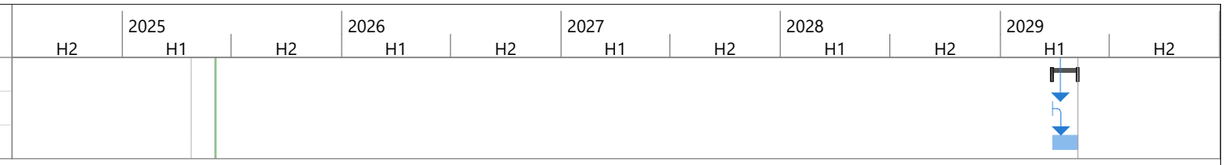
ID	Task Mode	Task Name	Duration	Start	Finish
81		Consultation, Focus Groups, Pilot Projects	3 mons	Mon 05/01/26	Fri 27/03/26
82		RIBA Stage 3 Reports issued for costing	2 wks	Wed 15/04/26	Tue 28/04/26
83		Business Plan, Activity Plan, Conservation Management Plan issues	1 day	Wed 15/04/26	Wed 15/04/26
84		RIBA Stage 3 Cost plan issued	0 days	Tue 28/04/26	Tue 28/04/26
85		Value Engineering (if required)	2 wks	Wed 29/04/26	Tue 12/05/26
86		Presentation to SOPPT	1 wk	Wed 13/05/26	Tue 19/05/26
87		Feedback issued	1 wk	Wed 20/05/26	Tue 26/05/26
88		Presentation to NLHF - Development Phase Review	1 wk	Wed 27/05/26	Tue 02/06/26
89		Final Evaluation of Development Phase	3 wks	Wed 20/05/26	Tue 09/06/26
90		Match funding for the Delivery Phase secured and in place	3 wks	Wed 20/05/26	Tue 09/06/26
91		**NLHF**	**155 days**	**Wed 03/06/26**	**Tue 05/01/27**
92		Preparation of NLHF R2 Bid	2 mons	Wed 03/06/26	Tue 28/07/26
93		NLHF R2 submission	1 wk	Wed 29/07/26	Tue 04/08/26
94		Decision	4.5 mons	Wed 05/08/26	Tue 08/12/26
95		NLHF Permission to proceed	4 wks	Wed 09/12/26	Tue 05/01/27
96		**Planning/LBC**	**201 days**	**Tue 25/11/25**	**Tue 01/09/26**
97		Planning/LBC Pre-Application	12 wks	Tue 25/11/25	Mon 16/02/26
98		Submit Planning/LBC Application	12 wks	Wed 29/04/26	Tue 21/07/26
99		Contingency	6 wks	Wed 22/07/26	Tue 01/09/26
100		Decision	0 days	Tue 01/09/26	Tue 01/09/26
101		**RIBA Stage 4 - Technical Design**	**115 days**	**Wed 06/01/27**	**Tue 15/06/27**
102		RIBA Stage 4 kick off meeting	5 days	Wed 06/01/27	Tue 12/01/27
103		Detailed Design Development	4 mons	Wed 13/01/27	Tue 04/05/27
104		Surveys and opening up works	1 mon	Wed 13/01/27	Tue 09/02/27
105		RIBA Stage 4 Reports issued for costing	0 days	Tue 04/05/27	Tue 04/05/27
106		RIBA Stage 4 Cost plan issued	2 wks	Wed 05/05/27	Tue 18/05/27
107		Value Engineering (if required)	2 wks	Wed 19/05/27	Tue 01/06/27
108		Presentation to SOPPT	5 days	Wed 02/06/27	Tue 08/06/27
109		Feedback issued	5 days	Wed 09/06/27	Tue 15/06/27
110		**Procurement of Contractors**	**115 days**	**Wed 02/06/27**	**Tue 09/11/27**
111		Prepare tender information	3 wks	Wed 02/06/27	Tue 22/06/27
112		tender period SQ and ITT	4 mons	Wed 23/06/27	Tue 12/10/27
113		Evaluation, clarification meeting, appointment	1 mon	Wed 13/10/27	Tue 09/11/27
114		**RIBA Stage 5**	**320 days**	**Wed 10/11/27**	**Tue 30/01/29**
115		Mobilisation/enabling works	4 wks	Wed 10/11/27	Tue 07/12/27
116		On site	11 mons	Wed 08/12/27	Tue 10/10/28
117		snagging, comissioning, handover	1 mon	Wed 11/10/28	Tue 07/11/28
118		Fit out (interpretation, client and operator fit out)	3 mons	Wed 08/11/28	Tue 30/01/29
119		**RIBA Stage 6**	**40 days**	**Wed 31/01/29**	**Tue 27/03/29**
120		Handover	2 mons	Wed 31/01/29	Tue 27/03/29



Project: R4390 SOPPT Program
Date: Thu 05/06/25

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

ID	Task Mode	Task Name	Duration	Start	Finish
121		**RIBA Stage 7**	**31 days**	**Wed 28/03/29**	**Wed 09/05/29**
122		In use	1 day	Wed 28/03/29	Wed 28/03/29
123		Evaluation submitted	1.5 mons	Thu 29/03/29	Wed 09/05/29



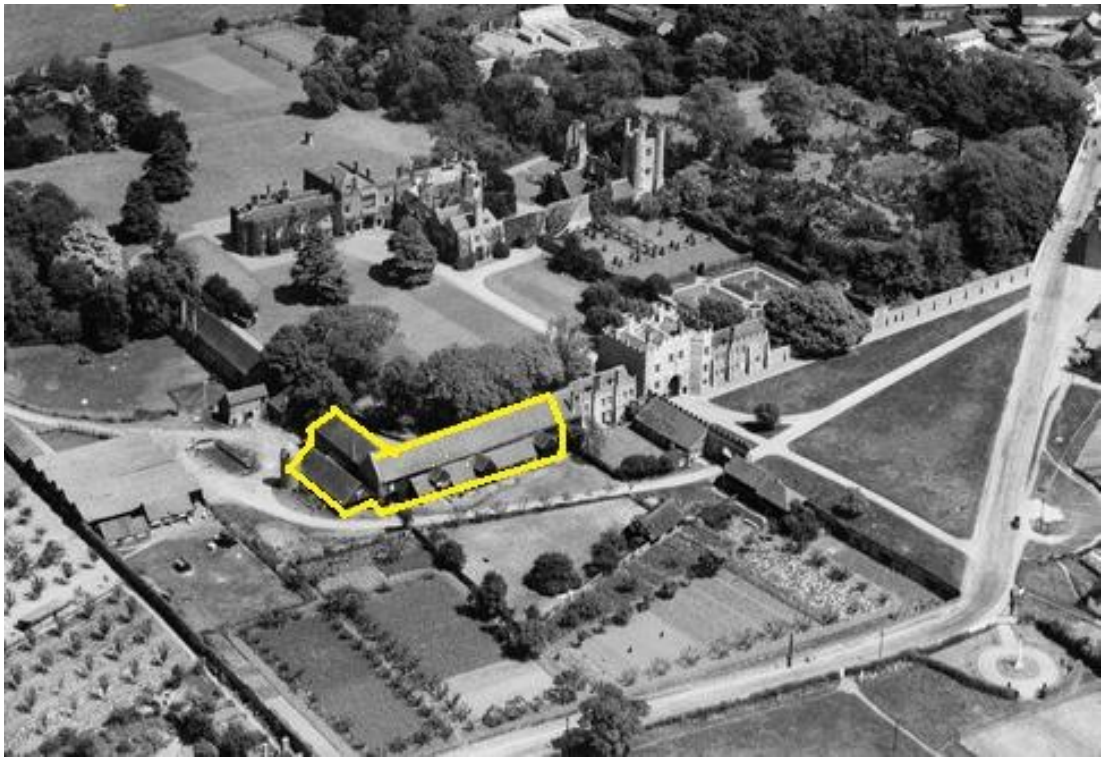
Project: R4390 SOPPT Program
Date: Thu 05/06/25

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

Appendix D - Reports and Surveys

ST OSYTH PRIORY, ESSEX

THE TITHE BARN, THE OLD DAIRY, THE CART LODGE: CONDITION SURVEY



Carden & Godfrey Architects
33 Clerkenwell Close
London EC1R 0AU

September 2022

1.0 INTRODUCTION

1.1 This condition survey updates a survey that was first carried out in 2000, and was subsequently updated on a number of occasions, last in 2009. The survey was of all the buildings, ruins and structures on the St Osyth Priory estate, and considered what repairs would be necessary for their then current use: at the time some of the buildings were inhabited, while most were not, and at the time there was no consideration of change of use, either to something more or to something less beneficial.

1.2 Over the years maintenance repairs have been carried out to all buildings and structures on the estate. While in some instances complete repair has been carried out, for example to the Colchester Road wall, to the blocked gateway on the Bury, and to the Bailiff's Cottage, elsewhere the level of repair has been only as necessary to deal with the specific problem, be it a water leak or a structural failure, and commensurate with the use of the building.

1.3 This updated condition survey deals only with the three buildings the Tithe Barn, the Old Dairy, and the Cart Lodge, where there are plans to repair and upgrade for a new use, but is substantially phrased as noting condition and like-for like repairs as the previous version of this survey; there are however many instances where comment is made on a higher level of repair which would be desirable or necessary if a beneficial use was followed.

2.0 THE TITHE BARN

2.1 Tithe Barn: Description

Masonry north and west walls, substantial timber framed south wall with extensions and cart entrances, faced in timber boarding. Roof a continuation of the substantial timber framing, simple double pitched tiled roof over all with lower monopitch roofs to the extensions and double-pitched roofs to the cart entrances. The roof has dripping eaves.

The interior of the barn – this excludes the cottage formed out of the east end of the original barn, which is now a separate structure, an extension of the west range of the gatehouse, and not considered here - is all one space at one level except at the west end where the floor is raised to allow vehicular access from the north side. At the west end above part of this raised floor is a modern first floor, where one existed previously; at the east end part of the tithe barn continues over a garage to the cottage.

The north elevation is random coursed septaria with occasional large stones, with flint galletting, of a generally homogeneous build. There is a plinth with a stone capping, and at first floor level an offset capped in stone. A modern cart entrance under a shallow segmental brick arch has been cut through at the west end, in addition there are three older doorways in stone with four-centred arches under flat hood mouldings. All doors are bead butt and painted. At the east end where part of the cottage the wall contains three small windows, two modern ones at first floor level with oak frames, stone jambs and timber lintels, and one older one at ground floor level in a stone surround with a stone mullion and hood moulding. There is a small rectangular slit window just east of the east doorway.

At the west end is a stone gable wall in galletted septaria and stone chequer, with a low parapet above the roof and a concrete or coarse mortar coping. This wall has at first floor level a blocked square mullioned window with chamfered jambs. This elevation is difficult to see as it is substantially concealed by the adjacent cart shed, but with its plinth and offset at higher level it appears that this wall is of the same construction as the north wall.

The south elevation is all timber framed with tarred or black stained weatherboarding, apart from the ground floor of the part that has been absorbed into the cottage which is in painted brick. A number of short wings in similar construction project from the main range, in addition to the three cart entrances. There is evidence that much of the timber frame is set on a brick plinth wall, but where the ground level has risen or the framing sunk the extent of the wall is unclear. In the main range there are a number of small windows at both levels, and one large 18-pane fixed light at first floor level at the west end.

At the east end where the elevation continues to form the cottage there are three six-on-six sash windows to the first floor set within the weatherboarded timber framing, and one sash window, one glazed screen divided into three equal panels, two of which form a pair of doors. Glazing matches that of the ground floor windows of the gatehouse west range. There is also one single pedestrian door, glazed, to this end of the tithe barn. There is a single chimney shaft to this end, and a modern timber gutter on gallows brackets to the cottage only, replacing that which once ran the whole length of this side of the barn.

Tithe barn roof structure

2.2 Tithe Barn: Condition

2.2.1 Roof

2.2.1.1 The roof to the main barn is supported on ancient trussed principals with braced purlins and rafters, which would seem to be part of the timber framing for the south side of the barn. In fact it appears that two different structures have been combined: the vertical posts which frame the south wall are connected to tie beams which sit on the north inner wall-plate and have short wall posts which in most cases are held back to the north wall by iron hoops. The roof trusses follow a different rhythm, with the principals unconnected with the tie beams and with the south ends sitting on the wall plate on the south side.

Sunk roof and wall at west end

Failed tie beam at west end of roof structure

2.2.1.2 The roof structure is for the most part in sound condition, although there is an area at the west end where it has sunk as a result of failure on the corner wall post. This area of roof should be restored to its original line, identifiable against the west gable wall, in association with the repair of the timber frame in this location.

The roof at the junction with the Old Dairy roof and partition needs proper repair, which will see the removal of extraneous unframed supporting timbers added in the past.

Some other repairs will be needed, including replacement of braces which have come free, and all joint should be checked and repaired or reinforced it appropriate with iron.

Tithe barn – damaged west end roof timbers

Tithe barn roof – loose brace and purlin out of line

2.2.1.3 The roof tiling is in fair condition.
On the north side there are a few broken or missing tiles; there is much moss which should be removed.
On the south side main roof there are also a few broken or missing tiles. There is greater damage to tiling on the south outshots and cart entrances.
To inspect the timber frame fully all tiling should be removed, and the roofs retiled after timber repairs allowing for some 30% new tiles, including on outshots and cart entrances. If beneficial use of this building is to be provided it is likely that the roof will need to be insulated which may have an impact on the roof detailing and especially the provision of ventilation while preventing bird access.

2.2.1.4 On the north side the eaves timbers are generally sound where visible, but some rot is visible on the ends of the sprockets and these will require repair and replacement as necessary – allow for 50%. Timber closure will be needed between the wall plate and the undersides of tiling, but this will need to be detailed once the roof insulation has been considered.

2.2.1.5 The west wall does not provide an adequate parapet to the roofs adjacent, and it will be necessary to allow for a lead secret gutter between the two.

2.2.1.6 Eaves gutters and downpipes should be allowed for. On the north side these will be conventional cast-iron, but on the south side of the main barn these should be traditional timber, lead-lined, as recently installed at the cottage: the brackets for this timber gutter survive on the south elevation of the main barn, but will need extensive repair if not replacement. Allowance should be made for cast-iron gutters and downpipes to the outshots and cart entrances.
Rainwater ground drainage will need to be allowed for, and if the ground levels cannot be reduced a French drain will be needed at least on the north and west sides to alleviate damp inside.

2.2.2 <u>North Wall</u>

2.2.2.1 The masonry is in generally good condition. There are some loose stones at the top of the wall which should be reset and rebuilt as necessary, including some local repointing and setting in of gallets.

2.2.2.2 The plinth is very mossy, particularly at the west end, and this should be removed and repointing carried out at the bottom 500mm for the entire length, and occasional joints elsewhere; in addition some 30no stones need replacing and 5no plinth capping stones. Much of the moss growth and damage can be put down to the dripping eaves and water splashing back from the hard ground surface below, which the installation of gutters will alleviate.

2.2.2.3 An area of about 1m2 around the slit window needs repointing. This window is either a later insertion, or the masonry around has needed rebuilding, as the masonry is untypically uncoursed here.

Tithe barn north wall

2.2.2.4 The stonework surrounds to the three pedestrian door openings are in generally sound condition, however some repairs are required where the ironwork has corroded and caused damage – remove ironwork and replace stones as necessary, replacing iron with stainless steel if necessary. Allow for 5no replacement stones and allow to point up stonework surround as necessary, allow to incorporate addition non-ferrous fixings for stonework back into core, and make good masonry around.
Allow to overhaul doors and ironmongery, including redecoration.
Allow to replace one threshold stone to match original detailing at adjacent door.
Allow to rebuild two sets of steps.

2.2.2.5 At the west end allow to rebuild in dressed stone rough jambs to the pair of cart doors, including repair of the ends of the plinth here.

2.2.2.6 To the windows overhaul and decorate as necessary, including repairs to glazing. The slit window has currently been sealed to the opening by mastic onto a timber batten – this is inadequate and the frame needs to be replaced with a new thin metal one.

Tithe barn north wall, showing moss on plinth and decay to west cart doorway

2.2.3 West Wall

2.2.3.1 The west wall is to some extent protected by the Cart Lodge. While there do not appear to be any major structural defects here, the decay on the septaria facing is extensive, and there is some deterioration on some of the dressed stone. The ivy should be removed and killed.

2.2.3.2 Ground levels are high and allowance should be made to reduce levels and add a French drain. Allow for repairs to masonry below existing ground levels – allow for repointing 3m2 and for refacing 3m2.

2.2.3.3 The top of the wall has a rough concrete capping or coping, which thickens towards the top as the height of the wall upstand diminishes against the adjacent roof: this needs replacement in stone, and some local rebuilding at the top of the wall. The need for a secret lead gutter adjacent has been discussed at 2.2.1.5 above.

Tithe barn west wall – note rough concrete coping and live and dead vegetation

2.2.3.4 In the gable some 9no dressed stones need replacing, with some 10no quoins and 11no elsewhere.

2.2.3.5 The plinth capping stones are generally sound, but 5no need replacing, and some minor mortar repairs and repointing is needed elsewhere. The septaria stone in the plinth is very eroded, and some 50% needs refacing, with repointing of the rest; gallets should be allowed for.

2.2.3.6 Allow to repair stone window surround.
Replace 3no stones to string course and rake out and repoint the remaining stones.

Allow to rake out and repoint brickwork to the northwest corner, devegetate tiling offset and retile as necessary.

2.2.3.7 How much of the decayed septaria walling facing elsewhere should be replaced is a subjective decision, but if only the worst are done an allowance for cutting out and replacing 200no stones should be allowed for.

Tithe barn west wall – decayed septaria and window surround

2.2.4 South Wall

2.2.4.1 This assessment of condition does not include the cottage at the east end, stopping at the east side of the east cart entrance.

2.2.4.2 The timber framed structure appears to be in fair condition for the most part, although it is evident that the brick plinth wall is less well-founded than desirable. The south wall is restrained by the tie beams which rest on the north wall plate and whose wall posts are for the most part held back by iron hoops; it is noticeable that many of the wall posts have moved away from the north wall, and the detail here needs to be strengthened.

2.2.4.3 The major problem with the south wall is at the extreme west end where the corner post has significantly decayed and is no longer offering support to the wall framing adjacent; as it has failed it has caused the roof in this corner to lower and the tie beam to crack. Other problems are at the cart entrances where the posts have moved and are no longer vertical; the absence of a sole plate, or a well-founded sole plate has caused some of the wall bases to move outwards. In other locations it is evident that temporary supports have been introduced to prevent further movement.

Tithe barn south wall – failed west end; note condition of window and boarding

Tithe barn south wall - boarding

2.2.4.4 A thorough survey of the timber frame including to the outshots and cart entrances needs to be carried out once the barn has been cleared, to look at the condition of the joints and the sole plate, and whether there are any unacceptably cracked members; such a survey would be more thorough if the external boarding was removed. Substantial repair should be allowed for, including rebuilding the brick plinth walls on new foundations, replacing decayed sole plates, replacing all defective timbers and splicing in repairs where appropriate. Consideration should be given to how much of the deformed frame should be set upright.

2.2.4.5 If the external boarding is not removed for examination of the timber frame some 70% of it will need replacing with matching boarding.
Allow for decoration old retained or new boarding with three coats of tar finish.

2.2.4.6 The 11no windows require repairs and decoration, with complete replacement to those which are either beyond repair or missing; allow for 50% replacement. New joinery will need to be detailed to ensure proper weathering, and proper weathering cover boards etc should be introduced to repaired joinery.

2.2.4.7 The 3no sets of double doors and 3no single doors and frames all require substantial repairs, including new ironmongery. Allow for new matching single doors and pieced in repairs to the double doors.
Allow for a new stone threshold at the half-glazed door.

Tithe barn south wall – defective plinth and timber frame

Tithe barn south wall, east end

2.2.5 Interior

2.2.5.1 The interior is fairly dilapidated, although the timber frame appears to be generally sound although close inspection and repair works are required as mentioned above. The interior is at present used for storage, and a close appreciation of the condition is not possible. It is however possible to state that substantial repairs will be needed at the west end where the tie beam has broken and the post has decayed, beyond replacing those members, and repair or rebuilding will be needed of the timber frame partition which separates the barn from the old dairy, including repairs to the roof structure over. Other substantial repairs will be needed at the base of the walls at the cart entrances and outshots where the sole plates and post ends have decayed; as mentioned above.

Tithe barn interior – looking west

Tithe barn interior – looking east

2.2.5.2 The first floor at the west end has remnants of the original floor beams, and allowance should be made for renewal of the floor in conjunction with the programme of frame repairs.

2.2.5.3 At the north side cart door the arch and masonry over has failed where the west jamb has been cut away. This needs complete rebuilding and repair, including to the masonry over the arch.

2.2.5.4 Removal of storage is likely to reveal the need for occasional repairs throughout – these will include occasional repointing and filling of internal masonry, and stitching where needed; plaster repairs; repairs to the brick floor, allowing for replacement of some 10m2 in matching bricks; repairing the fireplace at the west end; and treating the timber framing against insect attack.

3.0 OLD DAIRY

3.1 Old Dairy: Description

A two-storey building of late 18th /early 19th C date, running north from the west end of the tithe barn, with brick walls and a tiled roof, hipped at the north end and running into the tithe barn roof at the south end. It has a dripping eaves on all sides, but gutter brackets remain on the west side.

The walls are of large bricks (235x100x68mm slightly longer than imperial) in Flemish bond; there is a clear butt with cut bricks against the barn wall on the east side, and on the west side a butting return pier to meet the projecting west wall of the barn.

The east wall at ground floor level was originally built with a large central door flanked on both sides by two windows. The south window was at some time converted into a doorway, where it now contains a bead butt painted door with small fanlight over. The windows are two-light timber frames in chamfered brick surrounds, at first sight square but in fact with shallow segmental arches over. The timber frames have timber cills, above a timber cill to the opening; within the frame are two cinquefoil-headed casements with glazing bars separating small rectangular panes of glass. The central doorway is also chamfered, but with a four-centred arch over; the door itself is bead-butt boarded with fine decorative hinges and a fanlight over divided into small rectangular panes. The south door is also bead-butt boarded, and has fine decorative hinges different to those on the centre doorway; it also has a fanlight divided into three panes. There are no openings in this wall at first floor level.

The north wall has a projecting band at first floor level, the assumed moved window off-centre in the ground floor, and at the east end a bead-butt boarded door under a four-centred arch. It should be noted that while the doorway has the chamfer of the east wall openings the window does not, with plain square jambs and arch soffit.

There are the remains of a brick walled pen outside the window; although the brickwork is later the toothed remains of a wall on the west side indicate that something similar was part of the original design. Also external and to the north of the pen are the remains of paving, including some fine yellow herringbone brickwork.

Old Dairy: north and west elevations

The west elevation has a number of openings of more agricultural purpose, but it is not entirely clear how many of them are original. At first floor level towards the south end are two small four on four sash windows with half-soldier arches over, and towards the north end a boarded doorway with no arch over; although there is no arch the jambs have been carefully cut or created in the brickwork. At ground floor level is a large sliding door, breaking through the back of one of the stalls, with to the south two openings which had segmental arched heads: the south one which retains its segmental arch has a six on six sash window, while the other which has lost its head was converted to provide a wider doorway, once blocked but now in process of being altered again.

Inside there is a concrete floor at ground level, with the ghosts of the stable stalls and runnels for water etc, and the ghosts of the dairy walls visible. The walls here are painted brick with boarding on the west wall and both ends at the stalls. There is a first floor, with lath and plaster ceiling between floor beams. At the south end and separated by a brick wall is a square room, once the tack-room but now used for storage, from which a steep timber stair, enclosed in boarding, rises to the first floor hayloft; this room has a brick floor, boarding to most of the walls, and plasterboard to the ceiling.

The first floor is a large space open to the roof, with six trusses with haunched king posts and thin tie-beams, very much an early 19th C look to it. At the south end a timber framed daub partition separates this space from the tithe barn: there is a rough doorway which down three steps leads to the first floor west end of the barn.

3.2 Old Dairy: Condition

3.2.1 Roof

3.2.1.1 The inside of the roof gives some clues as to its present condition. It has been partially felted, and it can be assumed that repairs have been carried out in the past to slow down the decay on the first floor under. The roof structure itself, in pine, appears to be in generally sound condition, but occasional decay in locations where the roofing has been defective can be anticipated, and any reroofing should be preceded by a full inspection of the roof timbers and wall plate and repairs as required; allowance should be made for a prior treatment against beetle activity.

Old Dairy: roof structure

3.2.1.2 The roof tiling appears in generally sound condition with a few broken roof tiles, particularly on the north slope, which is also mossy: the north slope has 10no broken tiles visible, and some displaced at the bottom of the northwest hip; the east part of this slope is covered in ivy and hidden by the adjacent tree, and it can be expected that the number of broken tiles will be larger. The east slope has some unevenness, and at present has 5no broken and 2no slipped tiles, with some defects in the valley gutter to the tithe barn and 2no hip tiles that need replacing. The west slope has 6no broken tiles, and there is an area needing relaying at the bottom of the northwest hip.

3.2.1.3 While for its present use replacement of the defective tiles would suffice, for any beneficial use it would be desirable to incorporate insulation and roofing felt over the whole, and that would require complete retiling with tiles to match the existing to make up the shortfall. 50% salvage of existing tiles should be allowed.

3.2.1.4 The northwest hip has been previously repaired with half-round tiles and these should be replaced with bonnet tiles to match the northeast hip.


North slope and nw hip

3.2.1.5 The building at one stage had a gutter on the west side above the cart shed, with a pipe taken through at first floor level to the east side where it descended to the ground, but there is no evidence that there were gutters and downpipes elsewhere apart from a slight depression in the brick band below the emerging pipe and evidence of fixings; it is however clear that moss on the east wall and damage to the windows and doors have been caused by lack of rainwater goods, and gutters and downpipes should be added to all sides. Rainwater drainage and decoration should be included.

3.2.1.6 At present some of the eaves is blocked between the feet of the rafters, while the rest permits some ventilation. The further blocking of the eaves needs to be considered with insulation and ventilation of this building, and may involve the incorporation of eaves ventilators.
Decorate at eaves as necessary.

3.2.2 <u>East Wall</u>

3.2.2.1 To the brickwork minor repairs and repointing only are required, mainly at low level. Allow to remove the cast-iron downpipe bend penetrating the south end of the brick band and make good brickwork. New gutters and downpipes included at 3.2.1.5 above.
Include for removal of cement mortar repairs and renew damaged brickwork, allow for 10no new bricks; replace 15no damaged/decayed bricks elsewhere.
Repoint brickwork in bottom 3no courses where the mortar has been washed out.

3.2.2.2 On lower 6no brick courses remove and kill moss.

3.2.2.3 Between the north two windows is a recess which houses a water tap. This has been somewhat crudely created and finished, and has suffered from some mortar repairs. Allow to remove poor cement repairs and replace defective or damaged bricks as necessary.

3.2.2.4 The 3no windows are in fair condition, but have suffered deterioration since last being inspected. They suffer from defective paint and paint loss particularly to the lower

parts where the main cill, the frame cill, and the lower part of the casements are devoid of paint and have suffered from decay.
Allow for stripping all paint from casements and cills for redecoration.
It is likely that some timber repair will be needed once paint has been stripped – but the timber seems substantially solid and should be mostly repairable with a resin-based filler.
The brick chamfers and arch have been picked out in paint in imitation of stone and this should be included in the redecoration.

Junction with tithe barn; note pipe projecting from wall below floodlight

East wall window

3.2.2.5 The centre north window has a south casement renewed with glazing bars and frame sections of the wrong size – this should be renewed to match that adjacent.

3.2.2.6 The frame of the south doorway has already been repaired once, but the lower part of the frame and the timber threshold need replacement; it is suggested that the timber threshold would be best replaced in stone for longevity and reduction in maintenance. The door and fanlight need substantial paint stripping and redecoration, including derusting and decorating the hinges and latch, and decoration of the previously painted chamfers and arch.

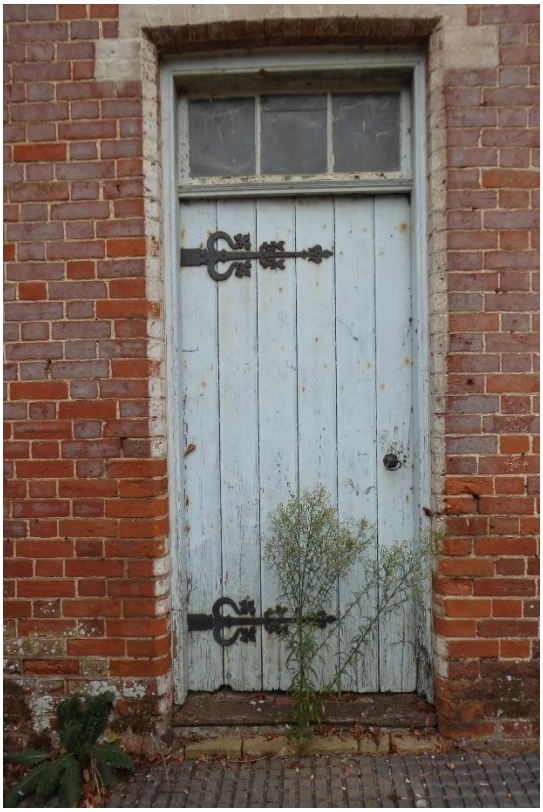
3.2.2.7 The frame of the north doorway has been previously repaired on both sides, but both sides are in need of further repair which may well involve replacing the lower sections.

The bottom board of the door is a somewhat crude old repair, no doubt where the bottoms of the boards had rotted, but the evidence of further rot above the level of the board indicates that further repair is needed. There is also rot at the top of the door which needs repair.

The mortar in the gap between the door frame and the front brickwork needs removing and refilling neatly; on the south jamb part has been previously filled with a sliver of brick, which gives a neater and longer lasting finish.

This doorway has a mortar threshold, which would more enduringly be replaced in stone.

The door and fanlight and ironmongery need redecoration, which will include some stripping of paint. Redecoration will also include the previously painted chamfers and arch.



East wall south doorway

East wall north doorway

3.2.3 North Wall

3.2.3.1 Strip ivy from northeast corner and kill. Carry out pruning etc to adjacent tree to give access to the works.

3.2.3.2 The brickwork is in generally fair order but allow to replace 18no bricks and 3m2 of pointing. Allow to point around door and window frame.

3.2.3.3 Part of the arch over the doorway has dropped slightly, allow for wedging with slate and for repointing the arch.

Dropped arch to doorway

3.2.3.4 The window is in fair condition. Allow to overhaul as necessary. Replace 1no broken pane of glass. Redecorate window – this will include some stripping of paint especially at the cill.
Note that this window does not have the east side chamfer detail.

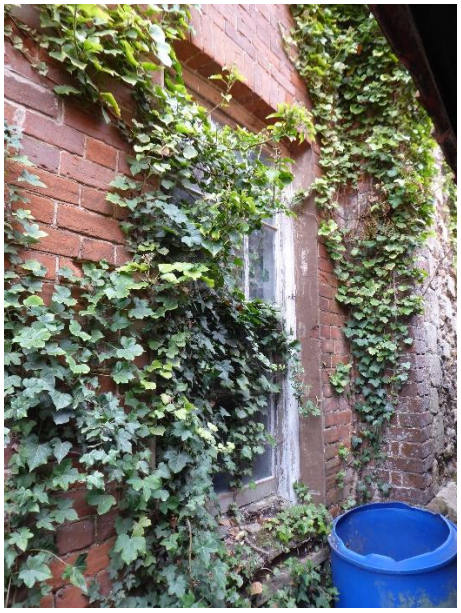
3.2.3.5 The door and doorway were substantially covered with ivy at the time of the reinspection, and this assessment of condition relies on the previous inspection with new information added where visible.
The door and frame are in fair condition, but it is evident that more paint has come off, revealing an underlying blue paint, and it can be expected that some timber repairs will be needed.
There is rot on the timber threshold, and this should be replaced in stone to be more enduring and require less maintenance.
Allow for complete redecoration of door, frame and ironmongery, which will involve some stripping of paint.


North wall doorway and window; both photographs show the vent pipe

3.2.3.6 The cracked cast-iron vent pipe, largely covered in ivy, needs repair and decoration if it is to be retained. If not needed it should be removed and the brickwork made good as necessary.

3.2.4 West Wall

3.2.4.1 At south end adjacent to tithe barn strip and kill ivy.



Ivy at south end

First floor door opening. Cracks are black lines on brickwork to left of doorway, but note repaired crack below the door

3.2.4.2 Brickwork is in fair condition apart from cracks at north end around first floor door opening. At first floor door opening allow for inserting stainless steel flat above timber frame to support brickwork.
In addition replace 10no bricks around, fill and point 2no cracks to north of opening (total run 2m) replacing 2no cracked bricks, and fill open joints around (a further 3m run of repointing). Note that crack continues as hairline almost to ground level – allow for additional cutting out of pointing, reinforcing with Bricktor or similar, and pointing up again.

3.2.4.3 Elsewhere allow for replacing a total of 20no defective or damaged bricks, and for repointing a total of 8m2 in small areas.

3.2.4.4 In conjunction with 3.2.2.1 above, remove cast-iron downpipe penetrating the wall at the south end, and make good brickwork. New gutters and downpipes included at 3.2.1.5 above.

3.2.4.5 At blocked ground floor doorway, remove timber blocking allow to rebuild jambs and reveals as necessary, fit new door and frame etc.

Blocked ground floor doorway and window beyond

Ground floor sliding door

3.2.4.6 The 3no windows to ground and first floor are in poor condition, and while it may prove that elements can be retained and repaired complete like for like replacement should be allowed for, including sashes, frames, cills and sub-cills. Allow for complete decoration and new ironmongery.

3.2.4.7 Allow for render repairs to reveals of ground floor window.

3.2.4.8 The ground floor sliding door is substantially rotten at the bottom and needs replacing.

The sliding track needs derusting, overhaul and decoration, and the drooping south end needs refixing. The track is a modern feature and it may be better to replace.

3.2.5 Interior – Ground Floor

3.2.5.1 The ground floor at the north end is acceptable for the present use as a workshop. If improvements to provide beneficial use are included, the floor will need replacing to include insulation.

Old Dairy – ground floor north end

3.2.5.2 There is some failure of the ground floor ceiling at the north end, no doubt related to the problems with the floor over. At present about 12m2 needs replacing, but it is likely that all will need replacing as the rotten and decayed floor over is renewed.

3.2.5.3 The walls are at present painted brickwork, and should be redecorated. If improvements to provide beneficial use are included it is possible that the walls will need plastering prior to decoration, including removal of the boarding at the stalls.

3.2.5.4 In the old tack room at the south end the brick floor requires overhaul and replacement of broken bricks, repairing the floor with bricks to match where concrete repairs have been previously carried out. Allow for replacement of 30% of the bricks. If a beneficial use is to be established a new insulated concrete base will be required. There is damp at the base of the walls, possibly abetted by the high ground levels to the west, and plastering should be allowed for as well as reduced ground levels outside to the west.
The fireplace surround should be repaired.

Tack room west wall – window just visible at left, old fireplace, and blocked opening

A number of plasterboard sheets to the ceiling are loose, and as the floor over will be renewed complete replacement of the ceiling should be allowed for.
The steep staircase up at the south end is in poor condition, does not comply with Building Regulations, and is at present unsafe. At the least it needs substantial rebuilding, but if it is required for use it will need replacing.
Allowance should be made in this area for minor repairs to all internal doors, joinery, boarding to stalls etc where there are damage and signs of decay, and for complete redecoration.

Staircase up to first floor

and down from first floor

3.2.6 Interior – First Floor

3.2.6.1 The floor boarding of the first floor is substantially defective, with many holes, rotten boards etc and will need to be completely replaced. The floor structure is timber joists running between primary east-west cross beams, and these can be expected to be in variably poor condition, and allowance should be made for complete replacement. As mentioned above at 3.2.5.2 and 4 the replacement of the floor will result in the replacement of the ceiling under.

First floor floor

First floor timber framed partition to tithe barn

3.2.6.2 The timber framed and daub partition to the tithe barn is ramshackle, but is historic. Any proposal to put back or bring into use the first floor at this end of the tithe barn will need to deal with the repair of this partition. Allow to remove rainwater pipe running across partition. Allow to repair existing oak frame and rebuild gable with new oak. Include for new lath and plaster finish. Allow to repair door set in new oak frame and replace missing and broken ironmongery.

3.2.6.3 Carry out repairs to brickwork and masonry at first floor level, allowing for rebuilding 1m2 of brickwork, cutting our and replacing 20no individual bricks, 10m run of deep repointing and 55m run of repointing below the wallplate; lay new single brick course below upper wall plate, approx. 55m run. Allow to brick between all rafter feet following reroofing works and repairs to rafter feet.

Old Dairy: first floor window – note floor boarding in front

4.0 CART LODGE

4.1 Cart Lodge: Description

The cart lodge is an 18th C six bay oak-framed structure, open at the ends and on the east side against the Dairy and the end of the tithe barn. It has a double-pitched roof with clay single Roman tiles and dripping eaves. The roof has staggered side purlins with ridge board, which may date from its previous move, and hanging knees at junctions of tie-beams and posts. Every other principal rafter sits above a post, the others at the mid-point of the bay.

On the short sides the shed is completely open at ground level, with weatherboarding in the gable. On the open east side there is a sole plate on a brick plinth, as there is on the closed side. The closed side has scissor braces within the line of the wall, with tarred or stained weatherboarding on the outside. The floor is simply compacted dirt.

4.2 Cart Lodge: Condition

4.2.1 Timber Frame

4.2.1.1 It is evident that the timber frame is in poor condition, and will need a full inspection once the present storage has been removed to ascertain the full extent of repairs needed. The poor condition is a combination of high ground levels, lack of rainwater goods and rainwater drainage, and neglect; and scheme of repair will need to deal with the ground levels and rainwater disposal.
The west side which is braced and covered in boarding while having moved has

maintained most of its integrity, but the east side which is open is in very poor condition. It is evident that the sole plates have deteriorated and in some places are non-existent, allowing the frame to fall away and resulting in the main frame, knees and ties pulling apart, cracking, and in some instances breaking. At the south end the whole frame has racked, causing the east knee to crack, and the excessive platform storage here would have caused this end to collapse if temporary propping against the masonry west wall of the tithe barn had not been carried out.

Cart lodge: west side framing

Cart lodge: east side framing

broken knee, southeast corner

4.2.1.2 The structural posts on the west side have extensions to the bottom outside, the function of which is not clear. They are exposed through the boarding and therefore are not protected against the rain and liable to rot – consideration of their removal should be given when the frame repairs are being ascertained, and if they are shown to be needed the boarding will need a detail to provide external covering.

4.2.1.3 Allowance should be made for substantial repairs timber repairs to the frame, including completely new sole plates and rebuilding of all brick plinths below the sole plates.

4.2.1.4 In association with the works above ground levels should be reduced as necessary and rainwater drainage allowed for.

4.2.2 Roof

4.2.2.1 The roof will need to be stripped and retiled as part of the repair of the timber frame under – the roof structure appears in fair order except at the south end where the south wall frame has racked, the framing has twisted, and joints have lost their integrity. The roof is at present felted, and the tiling for the most part is not in bad condition – the west slope is in good order, but the east slope facing the tithe barn has a number of holes, and at the south end the racking of the frame mentioned above with associated bending of the rafters has caused a large area of tiles to slip – the twisting of the roof structure will not allow the present single Roman tiles to be relaid.

4.2.2.2 Allowance should be made for new cast-iron gutters and downpipes, connecting to the rainwater drainage mentioned in 4.2.1.4 above. Include for decoration of rainwater goods.

Cart lodge roof interior

Damaged roof tiling above the racked south frame

Cart lodge wall boarding north gable

4.2.3 Wall Boarding etc

4.2.3.1 The west side boarding is in fair condition, but there are a number of holes and some places where the boarding has slipped leaving gaps between the boards. The condition

is such that full replacement matching the existing should be allowed for after the main structural frame has been repaired.
Window frames in this wall should be repaired/replaced as necessary.
It may be necessary to provide a protection detail at the base of the posts – see 4.2.1.2 above.

Cart lodge wall boarding west side

4.2.3.2 The boarding in the north and south gables is acceptable with some repairs for the present storage use, but it will need to be removed to allow repair of the timber frame and full replacement should be allowed for.

4.2.3.3 Allowance should be made for three coats of tar finish to the boarding.

4.2.4 <u>Floor</u>

4.2.4.1 The floor is at present earth which is adequate for the present storage needs. Any beneficial use is bound to require a concrete floor, which should be allowed for in conjunction with the rebuilding of the wall plinths.

ST OSYTH PRIORY

VISITOR CENTRE

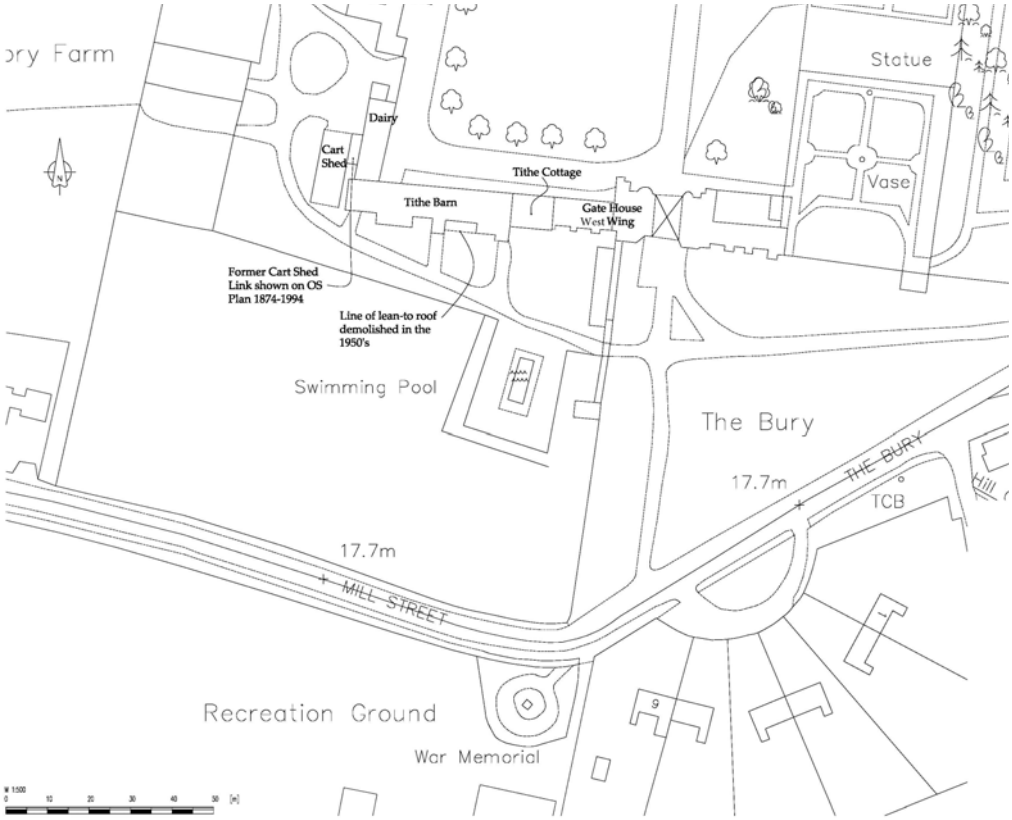
CONVERSION OF THE TITHE BARN, CART SHED AND DAIRY FOR USE AS OFFICES, SHOP, CAFE, CONFERENCES, FUNCTIONS AND WEDDING RECEPTIONS

DESIGN & ACCESS STATEMENT

FOR THE SARGEANT FAMILY

9th July 2014

CONTENTS



EXISTING SITE PLAN

PROPOSED SITE PLAN

1. INTRODUCTION

1.0 The Concept

The late C16 Tithe Barn and adjacent Cart Shed are the last two buildings at the old Abbey site to have no designated use. They are in urgent need of restoration and conservation to provide a sustainable and viable use that secures their long term futures and the site as a whole is in need of a visitor centre to fulfil the ambition of the owners to make it self-sustaining.

South View

North View

A suite of planning applications were submitted in March 2011 as part of an overall package of enabling development intended to tackle the 'Conservation Deficit' that continues to blight the St Osyth estate. These are currently the subject of an appeal against their non-determination because the decision notices were still not issued over 5 months after the planning committee voted for refusal. English Heritage guidance and common sense dictate that time is of the essence when dealing with fragile ancient buildings that have a substantial conservation deficit because time is money and enabling development is a balance between heritage, public benefits and viability. The current applications are submitted to move forward with the vision for restoring the estate and the planning application is effectively a resubmission of 11/0334/FUL for the creation of a visitor centre in the walled garden. This is not because those proposals were inappropriate but simply to provide a genuine alternative that can be judged at the local level as opposed to having to consider them as part of the planning appeal, saving time and resources for both parties including the public purse. They will also enable the restoration of – and provide a more viable use for – the Tithe Barn and Cart Shed, both listed builsings on the "at risk" register.

The key 'drivers' in the concept for this project are:

1. to gain consent for alternative beneficial uses for the Tithe Barn and Cart Shed at St Osyth Priory that are more valuable than their current uses, still sympathetic to their heritage value and will better assist with their repair, thus providing them with a more secure long term future;
2. to enhance this part of the St Osyth Conservation Area;
3. to provide an enhanced facility and service to the parish, the district, and tourists from further afield;
4. to assist in the successful delivery of the vision of the historic St Osyth Priory Estate to become a significant leisure and tourism venue within Tendring;
5. to align with the stated regeneration aspirations of Tendring District Council;

6. to attract a commercial venture to St Osyth Priory that will invest in the site and in doing so reduce the significant conservation deficit that exists at present.

After investigation, consultation and consideration, the vision laid out in these applications is to convert the barn and cart shed to new uses, the resulting complex performing the role of reception for visitors to the Priory park and gardens, incorporating a shop and café. Additionally, they would accommodate offices, function spaces, and a wedding reception venue to support the Darcy House rooms which are approved premises for marriage ceremonies under the Marriage Act.

The proposals allow for a slightly extended loft to the barn, the opening up of its east end and two of the three midstreys, the reinstatement of the east wall of the cart shed and the installation of some partitions, kitchens, bar, wcs etc and the provision of parking in the adjoining paddock.

The proposals accord with the published Tendring DC tourism and regeneration strategy and will also provide an important impetus to accelerate the delivery of the vision for the St Osyth Priory Estate by allowing accommodation associated with the estate to be delivered in the long-term Priory restoration and make best use of the Priory buildings.

This statement is written along CABE guidelines and with regard to the guidance in Circular 01/06 (August 2006). It explains what is being provided and how the proposals will create a high quality place that is easy for everyone to use. It will start with the location of the historic place and identify the key features of its context, describing the evolution of the final proposals and how they respond to their surroundings. The statement will identify who has been consulted and how their concerns and ideas have been integrated into the final scheme. It will say how accessible the development will be for the people who may use it, and in situations where constraints are unavoidable – for instance, in entering listed buildings – how the effect can be minimised to ensure an acceptable design response and level of accessibility for all.

1.1 A Brief History of St Osyth and the Priory Site

St Osyth, recorded as Chicc in the Domesday Book, is said to be the location of a C7 convent of which Osyth was Abbess. The Priory was founded around 1120 by Richard de Belmeis, Bishop of London, and was raised to the status of abbey before 1161. Its deer park is thought to date to 1268 when a charter was granted to the abbey allowing some hunting rights.

Of the monastic buildings, the earliest remaining work is the sub-vault of the C12 Dorter range and probably the remaining sections of the east and west walls of the Cloister. The Frater was rebuilt in the early C13 with the vaulted passage to the east of it and at the end of the C13 the vaults in the former west range were constructed. The Great Gatehouse and its ranges were built to express the might of the Abbey in the late C15, the eastern range incorporating the earlier and more modest gatehouse. In about 1527, Abbot Vyntoner built the Abbot's Lodging [now 'Darcy House'], on the north side of the court, with its adjoining southern range. The Abbey surrendered to the Crown in July 1539.

Post-dissolution, the Priory was bought by Thomas, 1st Lord Darcy, who transformed the abbey into a substantial house. He demolished the conventual church, built the so-called Abbot's Tower, the Clock Tower on Vyntoner's southern range and converted the upper part of the dorter range into his house.

In the 1720s, Frederic Nassau de Zuylestein, 3rd Earl of Rochford built a new house on the north side of the precinct and restored the gatehouse. His son added a range to the house and laid out the park. The Nassaus remained at the Priory until 1858, when it passed to Charles Brandreth, only to be sold to Mr (later Sir) John Johnson, a London corn merchant, in 1863. Brandreth demolished most of the Rochford house. Johnson began the restoration of the Abbot's Lodging in the 1860s and went on to restore the south range and embellish the Dairy, the gardens and park.

In the C20 the property passed through a number of owners. From 1948 to 1990, the house was used as a convalescent home. In 1954 the estate was bought by Somerset de Chair who converted the Gatehouse into a separate residence. Having married the heir to the Wentworth art collection, he displayed a range of paintings to the public, including Stubbs's room–height prancing horse known as Whistlejacket.

The buildings under consideration are two-faced. They complete the polite countenance of the Priory precinct along with Vyntoner's and the Rochford work but also present a farmyard face to the south and west, now a paddock separated by a horse-proof fence and shrubs, but formerly used as gardens and orchards and occasionally still referred to as the Bantan Gardens.

Extract from Priory inclosure map of c.1840 – note the gardens and buildings on the paddock site

1.2 The Planning and Listed Building Consent Applications: a summary

The buildings are currently used as occasional storage; the Shed and Barn have no planning use whilst the Dairy is allocated for B1 offices. They separate the main precinct from the southern paddock which borders Mill Street.

The following are applied for:

Ground Floor

- DAIRY: Use in conjunction with the Tithe Barn [functions and café use] and Cart Shed [Shop] for stair access and wcs whilst retaining B1 use. LBC is sought for the works to achieve this.
- CART SHED: Shop and office use with wcs shared with Dairy and Barn which are to be used for functions, wedding receptions and conferences.
- Enclosing and laying out the Cart Shed as shown on the drawings
- TITHE BARN: Café, conference and use for wedding reception and ancillary functions.
- Alterations to barn to achieve the layouts shown on the drawings
- Reinstatement of lean-to between eastern midstrey and eastern lean-to and attendant alterations to existing structures; for use as wc accommodation.
- Erection of timber-framed link between the Dairy and the Cart Shed

First Floor

- TITHE BARN: Use of mezzanine for functions and conferences as ground floor;
- Completing the mezzanine permitted in the SMC but slightly extending it and changing the layout and stair configuration;
- DAIRY: Slightly altering the south end layout of the permitted Dairy conversion for use as B1 facilities and in connexion with café, shop and functions, wedding receptions and conferences.

Upgrading for climate change and energy sustainability

- Insulating between timber frame to leave frame exposed to preserve heritage significance; insulating over the rafters for similar reasons.

Grounds

- Parking for approximately 111 cars in the grounds plus extensive tree and hedge planting.
- Road alterations and paving associate with the proposed facilities

2.0 THE PRE-DESIGN PROCESS

2.1 ASSESSMENT

Physical context

The Tithe Barn, Dairy and Cart Shed occupy a site just north of the Mill Street wall of the Priory, separated from it by a large paddock, formerly housing the "Bantan" garden and a range of other agricultural buildings. The Dairy and Tithe Barn also front the main Priory precinct, or green, onto which face the Abbot's lodgings and the remnant of Rochford's house, collectively known as Darcy House. The cart shed is close to the Dairy and was until recently linked to it. It stands in what was the farmyard but was only moved here in the mid C19.

The precinct displays great variability. There is a wide mix of dates and styles. Darcy House on the north and part of the east, is an ensemble of early C16 monastic, red brick Georgian and High Gothic late Victorian; the west range is monastic and of found materials, south of which lies the Dairy – Victorian neo-Tudor overlying a late C18 brick box; the south side comprises the Gatehouse [C13- late C15] and the Tithe barn in Darcy chequerwork of the late C19.

Remains of Abbey (11th C - Mid 16th Century).

Remains of Darcy Period (16th & 17th Century).

Remains of Rochford Period (18th Century).

Remains of Sir John Henry Johnson Period (19th Century).

1. The Bury.
2. Mid-16th C Wall with blocked archway.
3. Buildings flanking the Gatehouse 15th C with 13th C gateway.
4. Crenellated wall south of Gatehouse with 14th C Arch.
5. The Great Gatehouse dated about 1475.
6. The Tithe Barn mid 16th C.
7. The West Barn (the original structure is thought to be from the Darcy Period).
8. The Rochford House:18th C.
9. 'Bishops Lodgings' (built in 1527) (including the original well-proportioned Oriel Window).
10. Originally the Cellarer's Range which Darcy built on to and extended.
11. The Solitary Wall of the Darcy House.
12. 13th C Frater.
13. A solitary pier; the only remains of what is thought to be the Abbey kitchen built around 1200.
14. The Chapel of St. Osyth (part of the C13 dormitory).
15. The Abbot's Tower also known as Darcy Tower.
16. The Monks Cemetery (wilderness).
17. The Eastern Range.
18. The Modern Wing constructed by Sir John Henry Johnson, C19.
19. An Isolated Gate Pier of the Darcy period.
20. North Gardens.
21. The Bailff's Cottage (one of the earliest monastic buildings on the site to survive: C13).
22. The Brew House & Drying Shed both originating in C16; Drying Shed rebuilt C18.
23.The Dairy: late C18.
24. The Cart Shed: C18 with C19 features.

The elevations onto the paddock are simpler farmyard ones, in weatherboarding and modest brickwork although the west end of the barn is chequerboarded and did have a mullioned window before the cartshed was pushed up against it.

View from South pre 1958: Paddock and Barns with Precinct beyond; Dairy and Cart Shed linked

2.1.1 Architecture and Setting

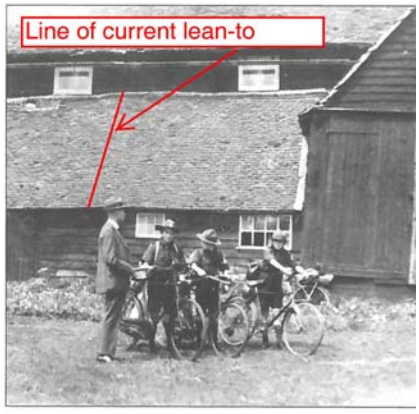
The Tithe barn

The Barn, listed at Grade II*, appears not to be the monastic one recorded at the time of the Dissolution as its structure indicates a date for it in the second half of the C16. It therefore forms part of the 1st Lord Darcy's remodelling of the estate and its buildings. It was altered in the C19 and C20 and the east bays converted for residential use in the 1950s. The north and west walls are built of septaria and limestone with flint galleted mortar and with limestone quoins. The south wall is timber framed and weather boarded, and the roofs covered in red plain tiles. The floors are part brick and part concrete.

The barn was originally of 14 bays; currently it comprises just 11, the original three eastern ones now occupied by Tithe Cottage. There are three midstreys and three lean-tos and evidence for other structures, no longer extant.

The north elevation is in chequered limestone in the manner of Darcy's work. Its three single doors and plinth are chamfered and the surrounds have Tudor arches and label-moulds. There is double door under a brick arch at the west end adjacent to which is attached The Dairy [a late C18 stable remodelled in the late C19] and at right-angles to it. At the east end there are two windows to the first floor of Tithe Cottage and one to the ground floor. The pattern of stonework of the west gable is similar to that of the north elevation.

North elevation chequerwork



East lean-to before truncation

At the west end of the south elevation is an inserted opening with double doors, above which is an inserted domestic window.

In the 4th bay, is the western midstrey, the entrance of which has been infilled. There are lean-tos each side of it. The central midstrey in the 7th bay retains its full height opening, with knee braces but no doors. The opening of the east midstrey in the 11th bay has been reduced in height by a stud wall and weatherboarding. There is a lean-to structure on its west side, once contiguous with it but now separated by a gap. Demolition is thought to have occurred in the early 1950s.

Tithe Cottage occupies the eastern end, with painted brickwork to the ground floor and weatherboarding above, with C20 'Georgian' windows and French doors.

INTERIOR

The north wall is of stone; the south wall consists of studs and mid rail. Most of the cill beam survives, on a brick plinth. Both sides of the central midstrey have studs and a mid-rail and its roof has coupled rafters with collars clasping a single purlin to each side. Opposite each midstrey, in the north wall, is a door in a splayed opening under a brick arch.

The main body of the barn is divided into bays of about 12 feet, defined by posts braced to tie beams, although to the north not all posts survive, and only two stand to full height within the eleven open bays, the remainder missing the lower portion, with only the braced section surviving. The southern posts are slightly jowled, those to the north are not, with the exception of the first two posts to the west. The rafters are coupled, the principals with collars below the upper of two purlins; the principals also have short, straight wind braces to either side. Between each pair of principals are four common rafters running behind the purlins.

North wall truncated posts

Straight-braced roof timbe

At the west end a partition with platform above separates the three end bays from the main body of the barn. The loft has an opening to the Dairy; the corresponding opening below is currently infilled but has SMC to reopen it. There is a brick fireplace in the west wall but the chimney has been truncated at roof level. The 11th bay to the east is also divided from the rest of the barn by a timber partition.

Few structural details are exposed within Tithe Cottage.

SIGNIFICANCE

Architectural interest: the barn is of what EH call “more than special interest” for the quality and intactness of its timber construction, retaining details of techniques specific to the period, as well as the unusual combination of stone and timber, the former providing an aesthetically acceptable appearance within the domestic sphere of Lord Darcy's inner court;

Historic interest: the barn forms a significant part of the post-Reformation remodelling of the Priory by the first Lord Darcy;

Group value: the building has group value with the other designated buildings and structures on the site, particularly those built or remodelled by the first and second Lords Darcy, as well as the Scheduled Monument and the registered Park and Garden. It should be noted, however, that the paddock is not in the registered park and garden and detracts from its significance in its current configuration.

The Cart Shed

The late C18 Cart Shed is listed at Grade II. Timber framed and weather boarded, it has a single Roman tiled roof. There are six bays of single-storey and a loft. There are two windows openings in the west wall, one of which is boarded over.

The timber frame comprises pegged straight bracing with tie beams with hanging knee braces, wall posts, wall plates and studs, the latter removed on the east elevation. The roof comprises principal rafters, staggered side purlins, roof collars and a ridge.

The building, unusually sited against the Dairy and with its missing wall, was moved there between 1814 and 1874, perhaps by Johnson, perhaps to contain cattle feed. It was linked to the Dairy until about 1955.

South elevation. Note block window to West of Barn

SIGNIFICANCE

Architectural interest: the building retains a significant proportion of C18 timber frame, representative of the vernacular building tradition of the time.

Historic interest: although the cartlodge has C18 origins, it has historic interest as part of the C19 evolved Priory complex.

Group value: the stable has group value with the other designated buildings and structures on the site, the Scheduled Monument and the registered Park and Garden.

The Dairy

The Dairy is a late-C18 stable, remodelled by Sir John Johnson in the late C19 and listed at Grade II. The name persists owing to its last use as a cowhouse.

Constructed of Flemish bond red brick with a plain tiled roof, the building comprises ground floor stabling with a grooms' room at the south end and a loft over.

The building is of two storeys and a hipped roof, adjoining the Tithe Barn at its south end. The east elevation has a brick band at the first floor and a central four-centred arch entrance and a late-C19 door with decorative strap hinges and a fanlight over; a similar door at the south end leads to the former grooms' room. There are three two-light, mullion windows with cusped heads, leaded lights and over-painted, brick hood-moulds. The north elevation has a door similar to that which leads to the grooms' room and a mullion window. The west elevation has an inserted door at ground floor, and a taking-in door to the loft towards the north. A second door opening has been enlarged so as to link to the Cart Shed, relocated next to the Dairy in the mid C19. The link was demolished about 1955.

The former stabling area on the ground-floor has chamfered transverse bridging beams and timber clad walls, but the stalls and feed chutes have been removed. The grooms' room to the south has timber clad walls, a pamment floor and saddle mounts on the walls. A stair leads to the loft above, where there are no historic fixtures and fittings, but the C19 king-post roof is exposed. The timber-framed partition with the Tithe Barn at the south end, has studs and a wall-plate of heavy scantling and retains some wattle and daub partitions; a plank door with strap hinges gives access to the loft at the west end of the Tithe Barn.

Junction of Dairy and Barn

SIGNIFICANCE

Architectural interest: the building retains a significant proportion of C18 fabric and has attractive features to the facade including the C19 windows and hood-moulds.

Historic interest: the stable has historic interest as part of the C19 evolved Priory complex;

Interior: interior fixtures and fittings including the saddle mounts and pamment flooring contribute to the interest overall.

Group value: the stable has group value with the other designated buildings and structures on the site, the Scheduled Monument and the registered Park and Garden.

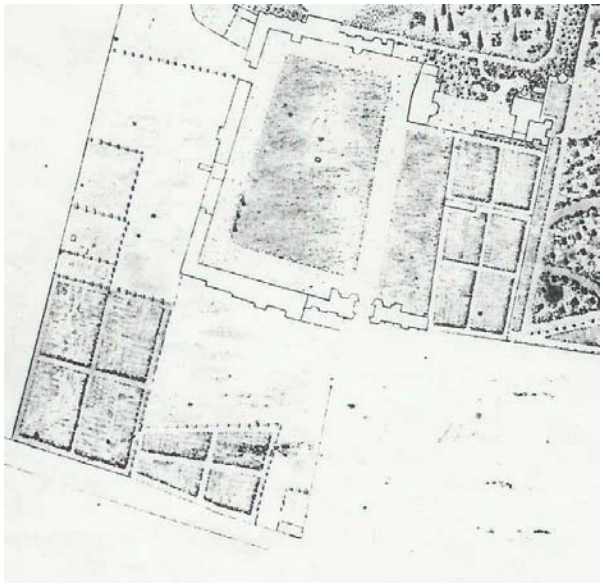
2.1.2 Views

Views out are limited. These are farm buildings made for working in and around. The Dairy looks east to the precinct and west onto the former farmyard and boundary wall. The cartshed looks westward onto the farmyard and the barn southward onto the current paddock and boundary wall of Mill Street. The space is contained by the track, a horse-proof fence and shrubs. Formerly the paddock was given over to formal kitchen gardens.

The views in are limited owing to the tall boundary walls. The long views recorded in the Environmental statement for the site show just rooflines and tree canopies.

2.1.3 Setting

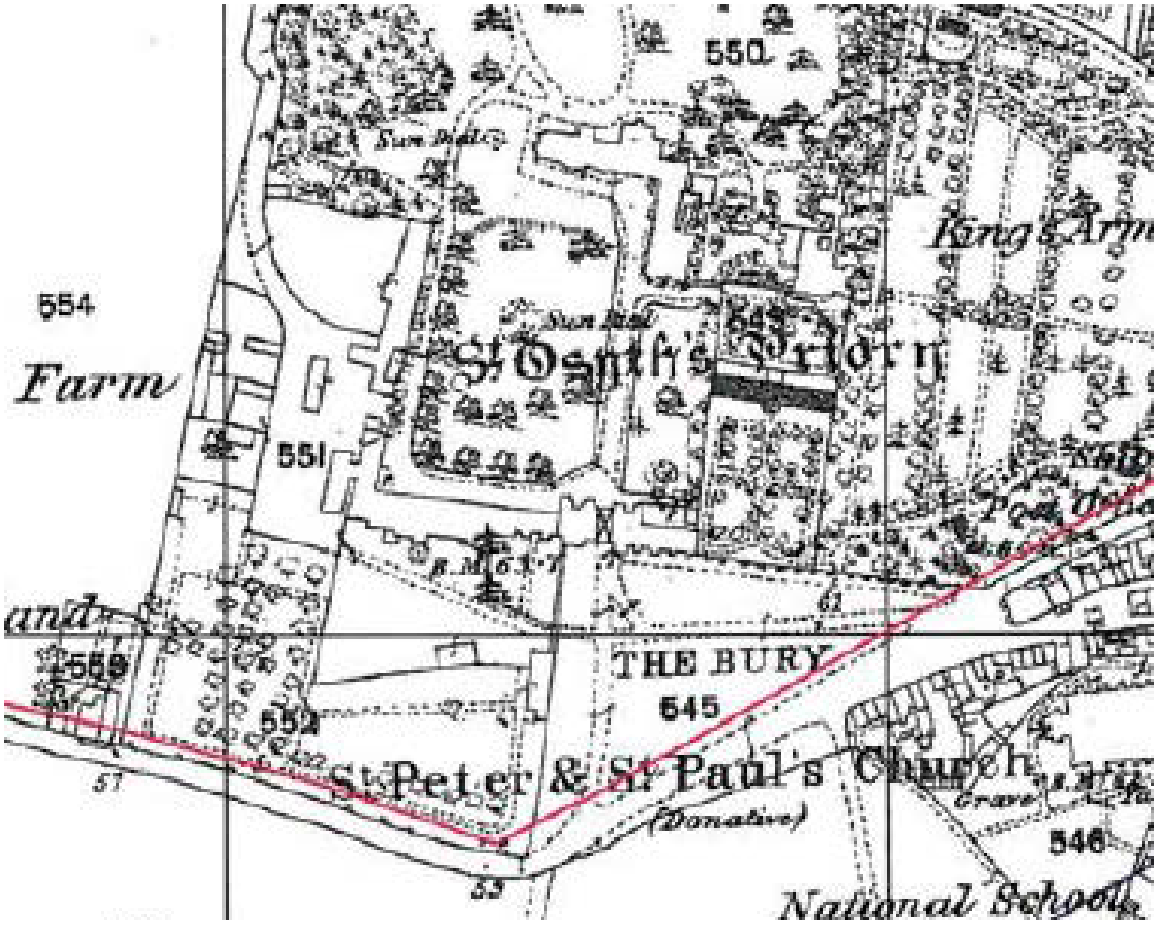
The northern aspect – the polite side – is much as it has been since the C19 although Johnson's mighty pergola adjacent to the Rochford house has gone, as have the carpet beds. To the south, the gardens and lesser barns shown on the 1938 map – the setting when the Priory was listed in 1950 – have all been removed leaving only the track and fence and shrubs. These would have hemmed in the barn and presented very differently from today's outlook.



1762 map of formal gardens in yard south of Barn

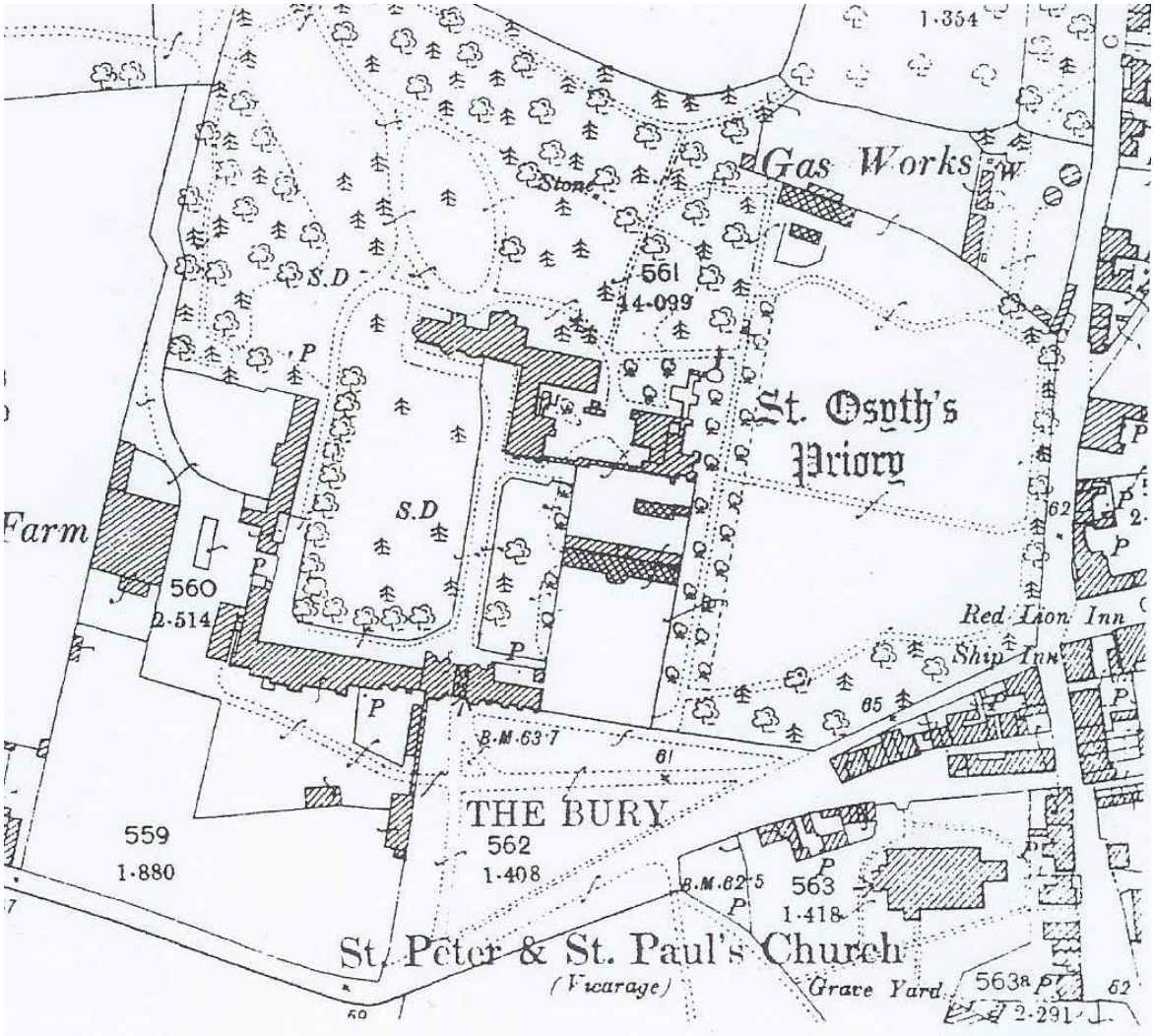
Entrance to Bantan Yard in the 1970s

1814 – no cart shed attached to Dairy. Buildings in gardens

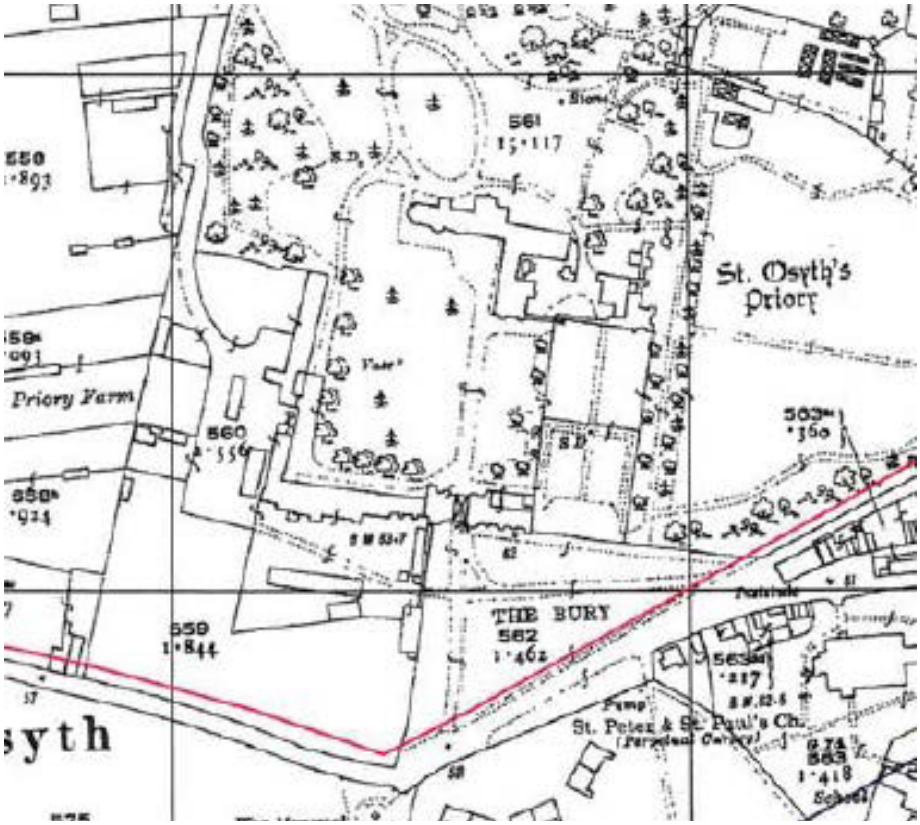


1874 – Shed attached. Track from East gate developed

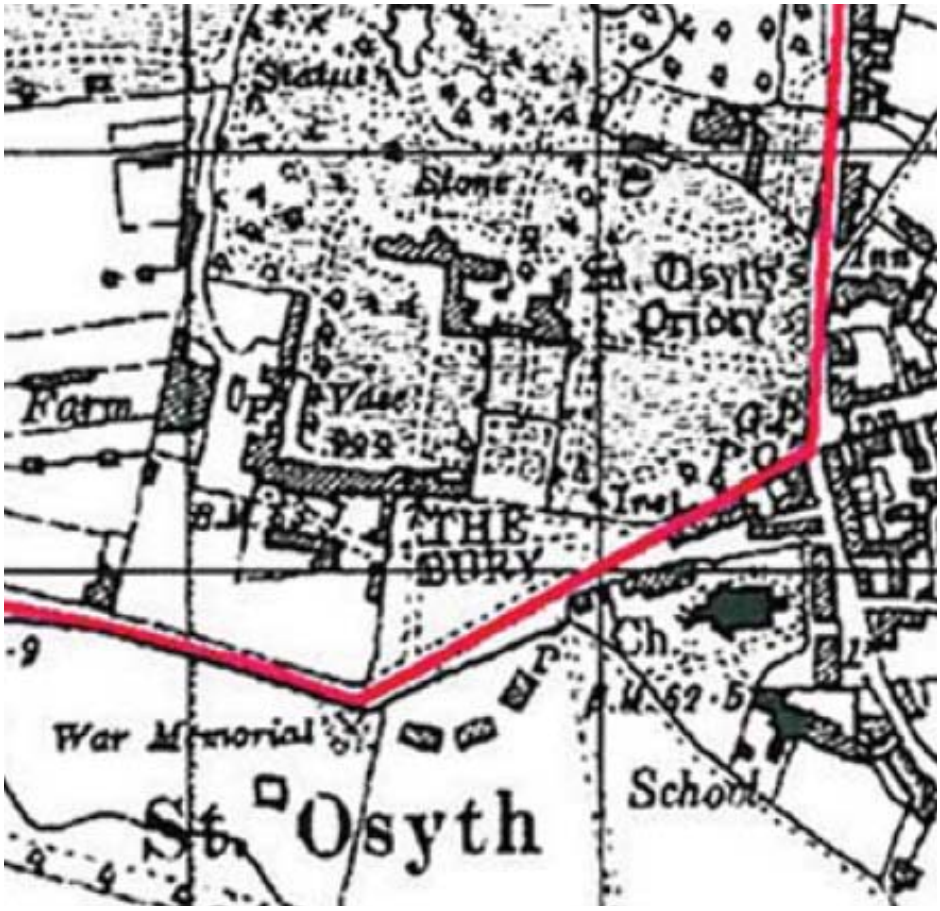
1875- outlook of barn hemmed in by gardens and new barn to south [see 1897 for detail]



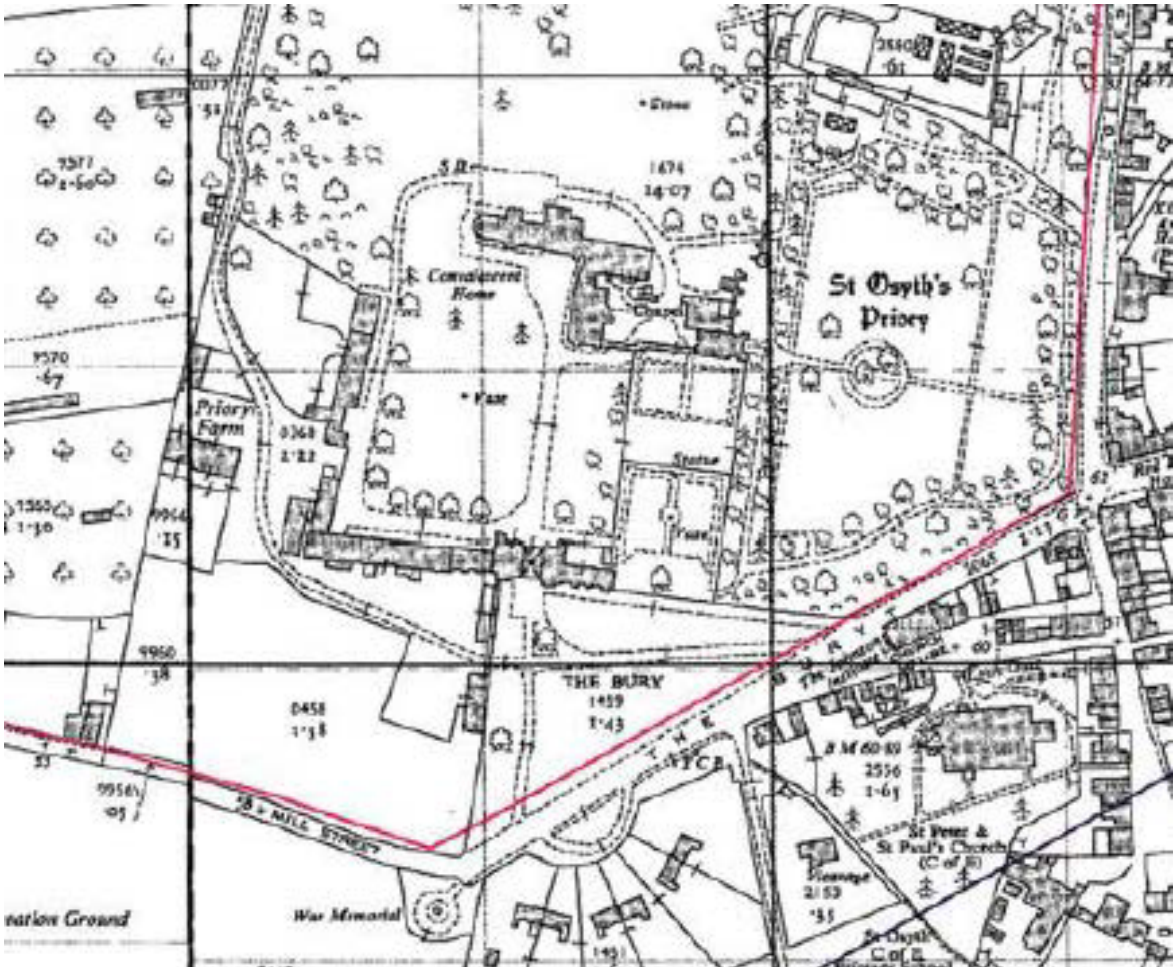
1897- new barn to south



1923 – more structures to south



1938- the setting up until Listing in 1950



1958 – lesser barns demolished and part of east lean-to

Social context

The Priory is the iconic building group of St Osyth; its Great Gatehouse and towers and the nearby Church, anchor the settlement of St Osyth in the minds of passers-by. The triangular greensward outside the gatehouse known as The Bury was the site of local festivities in mediaeval times. Mill Street connects the Priory/ Village at the top of the hill with the Quay on the Creek below.

The settlement of St Osyth is particularly susceptible to seasonal variation, its population swelling from about 4000 to 20,000 in the summer months. St Osyth Beach, Point Clear [accessed via Mill Street] and the surrounding caravan parks are the traditional attractions which draw tourists through the centre; the Priory itself was once a major tourist destination too. Clacton is now approached via the northern bypass.

Economic context

In the Middle Ages, the Abbey provided the economic base for of St Osyth and for many years, the Quay was the trading centre of the settlement as a whole with both goods and people arriving and departing by water. The settlement was a morning's sail from Colchester, a community important from Roman times and site of the first Augustinian priory. Following the Dissolution, the house continued to provide employment for many local people and the Quay

continued to employ the fishermen, bargees, maltsters and millers until the early C19 and then had spells of popularity in the mid C20 and early C21. The old Abbey provided a tourist hub for the village until the 1990s and since then many businesses starved of footfall, have closed.

PPS5 practice guide, para 36 says, 'High quality places also bring wider community benefits, such as better health and education outcomes, reduced levels of crime, and improvements in community cohesion and social inclusion. Heritage assets play a key role in defining place and in building local pride. They can have a totemic value to a community, provide local focal points and can offer spaces for recreation or for people to meet.'

In this vein, strategic considerations for local planners include:

- **The social value of heritage assets to the community**

  The social value of the Abbey/Priory has been considerable for the community of St Osyth and its conservation and re-opening to the public would ensure the continued presence of a group of iconic and historic buildings.

  The 2010 Heritage Counts Report[1] states in its conclusion, "In addition to economic benefits, it is also evident that heritage led regeneration leads to a number of less tangible, but equally important, wider social, cultural and environmental benefits. A survey of nearly 1,000 people and interviews with over 120 businesses, along with consultations with individuals involved in the implementation of the case study projects, highlighted a range of social and environmental impacts that are strongly associated with improvements to historic buildings and places. The results of the 'on street' survey identified that:

  1. 93% of respondents rated the projects assessed as making a good or very good contribution to the local environment;
  2. over 90% of respondents indicated that investment in the historic environment had resulted in a nicer place in which to live, work and socialise, as well as a more attractive visitor destination;
  3. some 92% of those that responded indicated that they would rate the projects assessed as either good or very good in terms of raising pride in the local area, while 93% rated the projects as good or very good in terms of creating a sense of place;
  4. 89% of respondents agreed or strongly agreed that the investment has created an environment with an enjoyable atmosphere and over 80% that the local areas are pleasant places to spend time in during the evening;
  5. approximately 95% of respondents agreed or strongly agreed that the project areas were now a good place to meet friends;
  6. perceptions of safety had also improved – the proportion of respondents that indicated positive feelings of safety increased from 81% to 91% during the day and from 85% to 94% after dark;
  7. the historic environment contributes to determining where people choose to visit, with 91% of respondents identifying it as an important or very important factor. The influence of historic buildings and places in decisions

[1] *Impact of Historic Environment Regeneration.* 1 October 2010

about where to live and work appears to be somewhat lower at 74% and 68% respectively, but still a significant proportion of respondents; and

8. 93% and 91% of respondents indicated that the project had improved the image of the immediate project area and of the wider town or city respectively."

- **The potential economic impact for heritage-led regeneration**

  The economic impact of development utilising the historic environment has been the subject of research by English Heritage and is covered in many of its publications including *Heritage Works*. Heritage regeneration is recognised as a catalyst to wider regeneration and on their Insights and Statistics page, Visit Britain [May 2014 update] say that for every £1,000 generated in direct tourism GVA there is a further £1,800 that is supported elsewhere in the economy through the supply chain and consumer spending. In *Heritage Counts 2013*, heritage-based tourism is listed as being worth £26.4bn to the UK economy – £5.8bn higher than the 2010 estimate – and employs 253,000 people.

  Visit Britain [May 2014 update] say that "since 2010 tourism has been the fastest growing sector in the UK in employment terms, responsible for one-third of the net increase in UK jobs between 2010 and 2012."

  Their report forecasts "that the tourism economy will be worth around £127 billion this year (2013), equivalent to 9% of the UK's GDP. It supports over 3.1 million jobs, that's 9.6% of all jobs and 173,000 more than in 2010. The sector is predicted to grow at an annual rate of 3.8% through to 2025 - significantly faster than the overall UK economy (with a predicted annual rate of 3% per annum) and much faster than sectors such as manufacturing, construction and retail."

- **The potential for heritage assets to improve quality of life and sense of place**

  The proposals would conserve the last Priory buildings with no allocated use and allow visitors once again into the Priory thus improving the sense of place for all.

- **Creating opportunities for the optimum viable re-use of heritage assets at risk.**

  PPS5 Practice guide, Para 89 says, 'It is important that any use is viable, not just for the owner but also for the future conservation of the asset. Viable uses will fund future maintenance.' The proposals represent the optimum range of uses for this heritage asset, uses that will be self-sustaining, combining visitor facilities with café and wedding party/ conference uses, ideally suited to large barns.

- **The role of traditional building materials and patterns of land use in local distinctiveness.**

  The development is committed to local distinctiveness in its scale, volumes, materials and interaction of solid and void. It builds upon the historic features of the settlement including a vernacular palette of render, brick and timber boarding, steep tiled roofs and low eaves.

The proposals seek to replace poor inappropriate modern features with ones that better complement the listed building and enhance the Conservation Area, such as the replacement of tatty fenestration and reinstatement of windows. Two former elements – the link and lean-to will be reinstated, the former allowing the observer to make sense of the cheek- by- jowl nature of Dairy and Cart Shed.

- **How heritage assets contribute to the attractiveness of streets and public spaces and how this contribution might be enhanced by, for example, reducing street clutter.**

  The parking area inside the walls of the Priory will relieve the former tourism pressure on the Bury, the traditional parking area for visitors since the 1920s.

- **The economic potential of heritage assets.**

  Commenting on the economic potential of a place like St Osyth, 'Heritage Counts, 2010' says, 'Historic environment attractions generates local wealth. Half of all jobs created by historic environment attractions are in local businesses.'

- **The possible impacts of heritage tourism on the historic environment and wider community.**

  The Heritage Counts and Visit Britain statistics have been cited above.
  Employment will be generated from the proposals. It is anticipated that four full-time positions may be created, along with dozens of local jobs including serving, cooking, waiting, gardening and maintenance staff.

- **Ways that new development might complement and enhance existing settlements and heritage assets.**

  The development will complement the local settlement in terms of provision of a good quality functions destination as well as public access to one of the most important monastic sites in the UK. It should bolster the local economy, providing consumers for ailing local services.

  The Conservation Area will be enhanced through the conservation of important listed buildings; the proposed investment in one of our more valuable and irreplaceable historic assets will create enhanced facilities which will support the successful delivery of the regeneration of the most significant historic estate within the District – a very beneficial outcome that aligns with the feedback from the local population, the local plan policies and the Council's published regeneration aspirations.

Planning Policy Context

2.1.4 National Planning Policy:

NPPF and NPPG

Chapter 12 of the NPPF "Conserving and enhancing the historic environment" is the most relevant to this application.

Para 126:

Local planning authorities should set out in their Local Plan a positive strategy for the conservation and enjoyment of the historic environment including heritage assets most at risk through neglect, decay or other threats. In doing so, they should recognise that heritage assets are an irreplaceable resource and conserve them in a manner appropriate to their significance. In developing this strategy, local planning authorities should take into account:

- the desirability of sustaining and enhancing the significance of heritage assets and putting them to viable uses consistent with their conservation;
- the wider social, cultural, economic and environmental benefits that conservation of the historic environment can bring;
- the desirability of new development making a positive contribution to local character and distinctiveness; and
- opportunities to draw on the contribution made by the historic environment to the character of a place.

Paragraph 7 is also important on account of the intended public benefits of the current proposals.

There are three dimensions to sustainable development: economic, social and environmental. These dimensions give rise to the need for the planning system to perform a number of roles:

- **an economic role** – contributing to building a strong, responsive and competitive economy, by ensuring that sufficient land of the right type is available in the right places and at the right time to support growth and innovation; and by identifying and coordinating development requirements, including the provision of infrastructure;
- **a social role** – supporting strong, vibrant and healthy communities, by providing the supply of housing required to meet the needs of present and future generations; and by creating a high quality built environment, with accessible local services that reflect the community's needs and support its health, social and cultural well-being; and
- **an environmental role** – contributing to protecting and enhancing our natural, built and historic environment; and, as part of this, helping to improve biodiversity, use natural resources prudently, minimise waste and pollution, and mitigate and adapt to climate change including moving to a low carbon economy.

Relevant NPPG notes include:

What is meant by the term public benefits?

Public benefits may follow from many developments and could be anything that delivers economic, social or environmental progress as described in the National Planning Policy Framework (Paragraph 7). Public benefits should flow from the proposed development. They should be of a nature or scale to be of benefit to the public at large and should not just be a private benefit. However, benefits do not always have to be visible or accessible to the public in order to be genuine public benefits.

Public benefits may include heritage benefits, such as:

- sustaining or enhancing the significance of a heritage asset and the contribution of its setting
- reducing or removing risks to a heritage asset
- securing the optimum viable use of a heritage asset in support of its long term conservation

Planning Policy Statement 5: Planning for the Historic Environment: Guidance Note

PPS5 formerly provided the government's requirements for the protection and enhancement of the historic environment. It has been withdrawn but the guidance note is still current.

Guidance on Good Practice in planning for Tourism

2.1.21 Following the cancellation of PPG21, the **Good Practice Guide on Planning for Tourism 2006** set out Government aims and objectives for tourism. This has now been archived and replaced by the following note in the NPPG:

"Tourism is extremely diverse and covers all activities of visitors . Local planning authorities, where appropriate, should articulate a vision for tourism in the Local Plan, including identifying optimal locations for tourism. When planning for tourism, local planning authorities should:

- consider the specific needs of the tourist industry, including particular locational or operational requirements;
- engage with representatives of the tourism industry;
- examine the broader social, economic, and environmental impacts of tourism;
- analyse the opportunities for tourism to support local services, vibrancy and enhance the built environment; and
- have regard to non-planning guidance produced by other Government Departments.

Local planning authorities may also want to consider guidance and best practice produced by the tourism sector. Further guidance on tourism can be found on the Visit England website."

2.1.5 Local Plan Policies

2.1.21 The site is outwith the 'Development Boundary'. All of it is in the St Osyth Conservation Area. There is no adopted Core Strategy at Local Plan level, so the adopted Local Plan of December 2007 constitutes the policy to be followed. The most relevant policies are listed here and the design response is given in Section 3.

Chap 2: Improving the Quality of Life

Policy QL9 – Design of New Development

All new development should make a positive contribution to the quality of the local environment and protect or enhance local character. Planning permission will only be granted if the following criteria are met:

i. new buildings, alterations and structures are well designed and should maintain or enhance local character and distinctiveness;

ii. the development relates well to its site and surroundings particularly in relation to its siting, height, scale, massing, form, design and materials;
iii. the development respects or enhances views, skylines, landmarks, existing street patterns, open spaces and other locally important features;
iv. the design and layout of the development incorporates important existing site features of landscape, ecological or amenity value such as trees, hedges, water features, buffer zones, walls and buildings (as well as opportunities to enhance such features e.g. habitat creation); and
v. boundary treatments and hard and soft landscaping are designed as an integral part of the development reflecting the function and character of the development and its surroundings.

In the case of large, complex or sensitive sites, applications for planning permission must be accompanied by a Design Statement.

Policy QL10 – Designing New Development to Meet Functional Needs

All new development should meet functional requirements. Planning permission will only be granted if the following criteria are met, or can be shown not to apply to the proposed development:

i. access to the site is practicable and the highway network will be able to safely accommodate the additional traffic the proposal will generate;
ii. circulation within the site and convenience of access to the development reflects the hierarchy of transport users set out in Policy QL2;
iii. the design and layout of the development maintains and/or provides safe and convenient access for people with mobility impairments;
iv. the development contributes to community safety by incorporating or providing measures to minimise opportunities for crime and anti-social behaviour;
v. buildings and structures are orientated to ensure adequate daylight, outlook and privacy;
vi. provision is made for functional needs including private amenity space, waste storage, separation and recycling facilities, servicing, vehicle and cycle parking; and
vii. the site will be served by utility services and other infrastructure necessary for the development proposed.

Any measures necessary to meet the above requirements are to be established by the applicant/developer.

Policy QL11 – Environmental Impacts and Compatibility of Uses

All new development should be compatible with surrounding land uses and minimise any adverse environmental impacts. Development will only be permitted if the following criteria are met:

i. the scale and nature of the development is appropriate to the locality;
ii. the development will not have a materially damaging impact on the privacy, daylight or other amenities of occupiers of nearby properties;
iii. the development will not lead to material loss or damage to important environmental assets such as buildings of architectural interest, the historic environment, water courses,

important archaeological sites and monuments and areas of conservation, recreation, ecological or landscape value;

iv. the development, including any additional road traffic arising, will not have a materially damaging impact on air, land, water (including ground water), amenity, health or safety through noise, smell, dust, light, heat, vibration, fumes or other forms of pollution or nuisance; and

v. the health, safety or amenity of any occupants or users of the proposed development will not be materially harmed by any pollution from an existing or committed use.

Where appropriate, compensatory and/or mitigation measures will be required to resolve or limit environmental impacts.

Chapter 3: Strengthening the Economy and Promoting Regeneration

Policy ER16 – Tourism and Leisure Uses

Proposals for tourism and leisure uses will be permitted provided that:

a. the development is accessible to all potential visitors and users;

b. there is suitable vehicular and public transport access to the site and parking provision, especially where the proposal is likely to generate large traffic volumes. Proposals should be located close to the main road network and link to other public rights of way wherever possible;

c. the type of use proposed would not cause undue disturbance by reason of noise. Uses creating high levels of noise should be located well away from residential property and sensitive wildlife areas;

d. there will not be an adverse effect on agricultural holdings and the proposal would not result in an irreversible loss of high quality agricultural land; and

e. where appropriate opportunities are taken to improve damaged and despoiled landscapes and enhance the landscape character of the area

Chapter 5: Safer and Healthier Communities

Policy COM1 – Access for All

Development involving buildings or spaces to which the public will have access as visitors, customers or employees will not be permitted if the design and layout does not provide safe and convenient access for people of all abilities. In particular, to ensure an inclusive environment development shall provide:

a. entrances which can be easily and safely accessed by all users, including those with mobility and sensory impairments;

b. safe and convenient access to the development for people of all abilities from parking areas, drop-off points and adjoining public spaces; and

c. clear signposting of accessible facilities and routes to accessible entrances.

Policy COM2 – Community Safety

i. All new development shall contribute to a safe and secure environment, which reduces the incidence and fear of crime and disorder by reducing criminal opportunity and fostering positive social interactions between legitimate users. In particular development shall:

a. maximise overlooking of areas which may be vulnerable to crime such as public spaces, car parking areas and footpaths;
b. maintain a discernible distinction between public and private spaces; and
c. provide a good standard of lighting to public spaces and routes.

ii. Measures referred to in (i) above, to protect the security of people and property, must be compatible with the character and amenities of the area, which can be successfully achieved through good design.
iii. In appropriate cases the Council may seek developer contributions towards the provision of CCTV, lighting or other security measures.

Chapter 6: Sustaining Our Environment

Policy EN6a – Protected Species

Planning permission will not normally be granted for development which would have an adverse impact on badgers, seals or species protected by Schedules 1, 5 and 8 of the Wildlife and Countryside Act 1981, as amended.

Policy EN17 - Conservation Areas

Development within a Conservation Area must preserve or enhance the character or appearance of the Conservation Area.

Development will be refused where:

a. It would harm the character or appearance of the Conservation Area, including historic plan form, relationship between buildings, the arrangement of open areas and their enclosure, grain, or significant natural or heritage features;
b. The height, siting, form, massing, proportions, elevation, design, or materials would not preserve or enhance the character of an area;
c. for development located outside a Conservation Area) it would prejudice the setting and surroundings of a Conservation Area or harm the inward or outward views;
d. the proposed land use would not preserve or enhance the function and character of a Conservation Area; or
e. It would involve the demolition of a building or structure positively contributing to the character or appearance of the area.

Policy EN22 - Extensions or Alterations to a Listed Building

Development involving proposals to extend or alter a Listed Building will only be permitted where:

a. it would not result in the damage or loss of features of special architectural or historic interest; and
b. the special character and appearance or setting of the building would be preserved or enhanced.

Policy EN23 – Development within the Proximity of a Listed Building

Proposals for development that would adversely affect the setting of a Listed Building, including group value and long distance views will not be permitted.

Policy EN29 - Archaeology

i. Development will not be permitted where the Council considers that it will adversely affect nationally important archaeological sites and their setting.
ii. Permission will be refused where development proposals do not satisfactorily protect archaeological remains of local importance.

Where applications are submitted on sites where information indicates that there are likely to be archaeological remains, the Council will expect to be provided with the results of an archaeological evaluation prior to the determination of an application. The evaluation should seek to define:

a. the nature and condition of any archaeological remains within the application site;
b. the likely impact of the proposed development on such features; and
c. the means of mitigating the impact of the proposed development in order to achieve preservation "in situ" or, where this is not merited, the method of recording such remains prior to development.

Where development is permitted on sites containing archaeological remains, any planning permission will be subject to conditions and/or formal agreements requiring appropriate excavation and recording in advance of development and the publication of the results.

Policy EN30 – Historic Towns

Any proposals for development within the Historic Centres of Harwich, Manningtree and St. Osyth will require an appropriate level of archaeological mitigation prior to development.

Sustainable Transportation

Policy TR7 – Vehicle Parking at New Development

For residential development within town centres and for all non-residential development, the adopted car parking standards will be applied. Outside town centres, variations to the adopted standards for residential development will be considered where local circumstances suggest this to be appropriate. In addition, new development should provide adequate powered two wheeler parking facilities and safe, convenient and usable car parking for people with mobility impairments.

Appendix 10a: Vehicle Parking Standards

Summary version of the Council's adopted SPG: Vehicle Parking Standards

Use Class	Description of Land Use	Standard (maximum)
A1	Shop	1 Space per 20 m^2
A3	Restaurants/ Café	1 space per 5m^2
B1	Business	1 space per 30 m^2
D2	Wedding receptions etc	1 space per 5 seats
Sui generis	Conferences	1 space per 5 seats

Note on Shared use facilities:

"When a use forms part of a shared use facility, parking standards must be looked at for all uses and the appropriate amounts supplied. For example when conference facilities are included in a hotel facility, appropriate parking standards must be applied for each use, however cross-visitation must be taken into account."

Appendix 12: Supplementary Planning Guidance/Supplementary Planning Documents

- Accessible and Inclusive Environments
- Design for Accessibility: An Essential Guide for Public Buildings
- Essex Design Guide for Residential and Mixed-Use Areas (1997)
- Essex Historic Towns (1999)

Tendring District Council Tourism Strategy 2010 - 2016

The Tendring Tourism Strategy identifies four key objectives:

- Increase the amount of money visitors spend in Tendring.
- Extend the length of time visitors stay in the District.
- Attract higher spending visitors.
- Improve the perception of Tendring as a tourism destination.

Achieving the four core objectives will enable Tendring to:

- Reposition itself as a major tourism destination, benefiting particularly from its excellent geographical location close to London.
- Reduce seasonality.
- Grow the local economy through increasing employment in tourism and visitor spend.

"History and Heritage" has also been identified as a themed product to help focus the marketing of Tendring and fits alongside the proposals and St Osyth as a tourist destination now and in the future.

2.1.6 Planning History

Cart Shed 01/02078/FUL
Re-location, repairs and minor alterations to existing barn (The Cart Shed)
Refused

Cart Shed 01/02079/LBC
Re-location, repairs and minor alterations (The Cart Shed)
Refused

The Dairy 01/01710/FUL
Conversion to office accommodation with associated sanitary and rest facilities. (The Dairy)
Approved and Commenced

The Dairy 01/01711/LBC
Conversion to office use with associated staff facilities. Internal and external works (The Dairy)
Approved and Commenced

Tithe Barn SMC, 2002: HSD 9/2/2069 pt 4
Mezzanine etc works
Approved and Commenced

2.2 INVOLVEMENT

2.2.0 The following consultations were had:

2.2.1 Planning Officer and English Heritage

The scheme was sent to the TDC Planning Case Officer and to the English Heritage Inspector of Monuments for Essex for their initial comments. No response was received from the Council but John Neale of EH sent one on 4th July 2014, which concluded:

"English Heritage consider that the proposed conversion of the tithe barn and cart shed could, in principle, be justified as part of a scheme for the repair and reuse of the Priory. As put forward, the proposals raise a number of questions – fundamental ones in respect of the approach taken to parking and landscape, and questions of extent and detail in respect of the works to the buildings…"

He added, "English Heritage have advised your Council that a trust should be established to help secure the future of the Priory. The proposed wedding venue and visitor facilities would seem likely to prejudice the operation of any such trust, and were that the case the implementation of these proposals would prove harmful, rather than beneficial…"

Matters of extent and design, parking and landscape, and the matter of a trust are discussed in 2.3 below.

2.3 EVALUATION AND DESIGN CONCEPT

2.3.0 The first step in the evaluation process was to assess the heritage significance of the building and the surrounding area and this yielded important constraints and opportunities. The Priory and its buildings have been assessed recently in exhaustive detail in the application for the Enabling Works at the Priory in 2011. This document is in the public domain but a brief résumé of the physical features of the buildings is given above.

2.3.0.1 The **Historic Building Appraisal & Heritage Impact Assessment**

For every intervention into an historic place, it is essential to understand the significance of the place and its surroundings. 'Authenticity' of place arises from the characteristics that most truthfully reflect and embody its heritage values. The heritage values are evaluated as follows:

• Evidential value derives from the potential of a place to yield evidence about past human activity. Apart from the buildings being farmyard structures and displaying their use, they also provide a built commentary on social hierarchy with their decorative fronts and functional backs. Evidential value also resides in both the barn and the Dairy in that they may be sited over monastic buildings.
• Historical value is to be found in the ancient fabric of all the buildings, which value is recognised in the Grade II and II* listings. The unusual timber and stone hybrid structure of the barn is also of value. The barn represents the considerable work done by the Darcy family in the C16 in converting the Abbey into a residential estate.

• Aesthetic Value: Aesthetically, the key external features are the massing, the palette of local materials and the relationship of the buildings to each other and the rest of the Priory site. The quality of the 'polite' sides is also worthy of mention.

Internally, the structure of the barn is of most importance, displaying the characteristics of the late C16.

The organic development of the place is its chief architectural feature: design value is fortuitous rather than conscious as EH say in *Conservation Principles*. The additive nature of the place is a particular feature of this part of the Priory which has been subject to improvement since the C12; the need to recycle and grow gradually is evident everywhere.

• Communal value: Communal value is clearly attached to the relationship of Priory and village in that the latter owes its existence to the former.

2.3.0.2 The significance of the Conservation Area is stated in the CA assessments of 2006 and 2010. Primarily, heritage value in this zone of the CA arises from its agricultural history and to a great extent the existence of the Priory and the Parish Church.

2.3.1 Considerations/Constraints:

Heritage

The buildings are listed and in the Conservation Area
The Tithe Barn is a SAM but is due to be removed from the Schedule this year
The St Osyth Conservation Area Appraisal

Planning

Proximity of neighbours
The site is outside the development boundary but is of national importance and in need of a viable use

Use and facilities

The buildings as they stand have no use apart from the Dairy which is to be offices when the Precinct conversion is complete. They are in poor condition and "at risk".

There is no toilet and drainage which will have to be introduced.

Parking is currently on the Bury which puts physical and aesthetic pressure on the Gatehouse and walls.

Setting

The fronts of the buildings give onto the Precinct so are part of the most important group of buildings in the vicinity. The green is nicely landscaped and well-kept. This is the sensitive side and alterations must be minimised.

As for the south and west sides, these comprise a modern swimming pool area, a modern barn [pump house], a rough fence and paddock, a materials yard and an Atcost barn, an outlook that might be described as scruffy at best and which would benefit from well-considered landscaping. The asbestos barn and rudimentary mesh fencing lend an air of impermanence, although there are three very good trees including a cedar and a sweet chestnut.

English Heritage, surprisingly, make the following assessment of the southern setting in their comments of 4th July: "If the approach to the buildings appears broadly appropriate, that to the landscape does not. The design both of the car park itself and of the landscaping within which it would be set, would harm the character of the Priory. The car park would be far too formal, and the landscaping would break up the openness of this area of the precinct. There is ample precedent for parking for public access to country houses to be treated much less formally. We would suggest that parking should be arranged to the west of the space and that the space should be kept as open as possible."

The openness that EH seek to prescribe is not borne out by the historic mapping dating back to 1762; nor is the informality. The evolution of the setting may be seen in the map regression in 2.1.3 above.

2.3.2 Opportunities:

Given the current abject nature of the old farmyard setting of the place and the poor internal finishes and structural condition of the Cart Shed especially, there is an opportunity to repair the place and the historic fabric so as to give a lift to this part of St Osyth Priory.

Given the tourist potential of the place, it is essential to tailor the business proposal to make the most of it.

Provide tourism and employment opportunities

2.3.3 Options:

2.3.3.1 ONE: Do nothing

It is possible to effect minor repairs but it is likely that the Cart Shed will keel over and the Barn lean-tos continue to topple. The barn roof and walls are in need of a complete overhaul and with no use, an outlay of that sort of money is unlikely.

2.3.3.2 TWO: Re-order and reuse as visitor/ function facilities

The next option would be to reorder the buildings in order to provide a sustainable future for the heritage asset [the Priory] as a whole.

Given the current nature of the setting of the south of the place and the poor internal finishes and structure, there is an opportunity to repair the place and the historic fabric so as to give a lift to this part of the priory site. Given the tourist potential of the settlement, the scheme would be best tailored to make the most of both the heritage and tourism opportunities.

The existing setting is poor. To improve it would be straightforward but there are potential conflicts of heritage and business needs. To realise the full potential of the business to provide good quality service, a proper commercial kitchen will be necessary and cooking requires wcs, flues and ventilation . Functions require heated spaces and parking. Potential conflicts may be best resolved most flexibly by reinstating the smaller volume spaces [lean-tos] and reconnecting Dairy and Cart Shed. External the use of stainless steel or copper flues would honestly represent the workings of a latter-day 'barn' and would be in keeping with its functional roots. It is important not to impinge upon the polite elevations to the north.

Natural lighting will be problematic and this is best solved by removing the midstrey infill and introducing glazing.

The Barn has SMC for a strengthened mezzanine which has been partially implemented. Use can be made of this to provide more intimate spaces and to house kitchens etc.

2.3.3.3 THREE: Traditional large-volume uses

These include antiques centres, churches, car garages and so on, none of which were considered to be appropriate to the setting even if the volume of the barn would be preserved. A spa for a hotel complex was drawn up several years ago but the scheme foundered on economic grounds.

2.3.3.3 FOUR: Residential conversion

The Barn would convert readily into two large houses but there is a pressing need for visitor facilities to realise the long-term sustainability of the Priory site as a whole.

2.3.3.4 The design concept

Option 2 has been selected.

Given that all the buildings were farm buildings, there is historic precedent for functional buildings ancillary to the main purpose of the estate and the suggested usage would support the marriage rooms in Darcy house as well as providing income to sustain the upkeep of the place.

We are aware of the EH comments regarding a Trust but that is a matter that does not concern this application which is for change of use and implementing the new uses. The approach to the wider estate is 3-pronged: a) enabling development – housing development outwith the historic park will soon provide funds to begin the work on the most urgent repairs; b) commercially viable uses which comply with policy – including this current application as well as the residential permissions for the precinct, and c) forming a Trust – an ownership matter that will enable funds to be raised via grant aid to take care of the historic buildings and remains with no beneficial use. In tandem with the current applications, the applicants and owners have secured the assistance of the Prince's Regeneration Trust in forming such a trust.

Permitting the current application will provide a viable use for these buildings, one that would appeal to a commercial user. Wedding function venues are extremely popular in this part of England, especially those in converted ancient barns. Given the iconic nature of the site and the recent popularity of the site with tourists, it is felt that the visitor centre proposal is an extremely

good way to secure the future of these buildings which currently are little-used, and a certain money-spinner which will contribute to their regular upkeep.

The use of the barn for functions would retain its volume. The consented mezzanine would extend a little further but not to the detriment of the space. No changes are proposed to the north thus preserving this setting. Changes to the south in initial proposals included reconfiguring the midstreys to let light in, adding skylights over the rafters, rebuilding the lean-to and the link and glazing the cartshed ends. These would read as part of the natural evolution of the farm buildings and in any event would be reversible. The opening into the lean-to for the wc for the disabled would result in a small loss off plate and midrail and the three flues would be visible so alter the appearance slightly.

EH has requested the omission of skylights, and this has been done. They counsel against lining the frame internally and the scheme whilst allowing for insulation will not encompass lining thus achieving energy savings whilst still display the historic timber frame. EH believe that glazing the midstreys will cause harm to the appearance but accept that in this type of conversion, this approach is inevitable. Besides, the original doors do not survive, the infill is replaceable and recessed, and new doors can be made at any time in the future.

The landscaping proposals sent to EH saw the paddock heavily planted with oaks among which parking would be allowed. This would make use of a disused area of the site and would not impinge on the outlook of the barn which in history has been quite hemmed in, as the map evidence displays. Views from the CA would include more tree canopy either side of the main long-distance view from the Warren so focus that view on the barn.

EH believe that the site would be too enclosed despite the provision of a 'working' area for the converted barn in the form of a terrace and green, no less space than in recorded history. They believe that the parking would be too formal but it would be sited on the former *formal* gardens which date back at least to 1762. Also, formality is more efficient and would occupy less ground and be cheaper to build than the informal alternative requested by EH.

Despite this fundamental disagreement regarding setting, the parking has been relocated in the south and the west of the paddock in deference to EH's wishes, thus producing a large open green south of the barn. The residential enclosures to the east side, serving the Tithe Cottage and Gatehouse are retained.

3. DESIGN

3.1 Use

3.1.1 Main Features of the Design

The site and building are to be repaired, upgraded and reconfigured as follows:

BARN

Ground Floor

- Install kitchen, café server and bar complete with partitions and fittings; raise lower floor a maximum of 150mm to aid accessibility
- Complete the permitted mezzanine but extend it slightly. Bring stair inboard of the structure rather than penetrating into the main barn.
- Remove east partition and loft to open up eastern midstrey.
- Reinstate lost eastern lean-to and convert this with existing section of lean-to [boiler room] into wcs and reconfigured boiler room. Loss of small section of wall plate and midrail to central midstrey for access.
- Install café log burner
- Insert plate glass doors inside double doors.
- Glaze central and eastern midstreys. Recess so as to emphasize historic opening now obscured by late infill.

First Floor

- Complete brick chimney and window reinstatement works and extend chimney through roof.
- Partition off function room – glazed over to allow roof structure to be read from main volume of barn.

DAIRY

Ground Floor

- Reconfigure south end from permitted scheme to facilitate shared use with barn and cart shed

First floor

- Ditto

CART SHED

- Glaze both ends
- Insert skylights on inner slope
- Reconstruct link to Dairy
- Convert to shop and office with attendant fittings and partitions

GROUNDS

- It is proposed to provide parking for about 111 cars in the grounds to the west and behind the pool, in an informal 'U' shape as requested by EH.

- Form lawn and patio area to west end of barn to facilitate café, shop and wedding parties

As set out elsewhere in the statement, the design whilst constrained by heritage requirements sets out to comply with Policy QL10 in meeting the functional needs of clientele, utilities providers and emergency services.

3.1.2 Use in relation to Tourism and Employment opportunities

The proposals are designed to augment the tourist potential of Tendring and uplift this part of St Osyth. The Clacton Gazette reported in 2011[2] that not one TDC coastal resort came close to the top ten most popular seaside destinations despite a massive resurgence in UK tourist numbers this year. Indeed the only ranked Essex resort was Southend. No Tendring resort made the top 20, all of which are attracting visitors via a mix of traditional and higher end accommodation and restaurants. Since then, nearby Clacton has been ranked as the second most deprived seaside town in the country [22nd August 2013]. Tendring has the second highest unemployment rate in Essex, thus these proposals should be welcomed on the employment front also.

Tendring DC recognises the need for regeneration from the grass roots and has a 2010-2016 regeneration policy and a Head of Regeneration which seek to make Tendring 'the place of choice for visitors seeking to experience a 21st century coastal resort…[and] an area synonymous with quality.[3]' The statement says,

"The Council will take a proactive approach in its planning role to ensure opportunities are grasped and new ways of delivery are exploited. Tendring will be recognised as opportunist and prepared to push boundaries in the best interests of its residents and businesses. It cannot deliver in isolation but it will:-

■ Exploit and support financial initiatives that help underpin or deliver investment that in turn creates jobs and provides new or enhanced facilities.
■ Implement a separate Tourism Strategy with the private sector to identify the investments and promotional activities required to ensure that Tendring becomes the destination of choice for visitors to the east coast."

It continues, "The district has the capacity to reinvent itself as a major seaside destination and become truly 21st century seaside resorts offering a high quality all year round visitor experience…[and] expand the events programme to provide activities and attractions outside the traditional summer holiday period."

Further, "Supporting the development of existing businesses will make the biggest contribution to our economic success. We want Tendring to be known as an area that is 'Open for business'." The strategy aims to:

■ Ensure that the District's planning policy the Local Development Framework is flexible and receptive to investment opportunities.
■ Develop and maximise our cultural and heritage assets.

[2] 25th August 2011
[3]http://www.tendringdc.gov.uk/sites/default/files/documents/business/regeneration/regeneration%20strategy/RegenStrategyFinalCouncilapproved25510.pdf

The redevelopment of the Priory barn and Cart Shed will help the Council implement this approach to conserving history and heritage in order to create good places to live and work and will add to their activities in respect of tourist-led regeneration.

Policy EC6

These proposals assist especially in respect of policies EC6 [economic development in rural areas] and EC7 [planning for tourism in rural areas] For example,

EC6.2 says that in rural areas, local planning authorities should:

> identify local service centres (which might be a country town, a single large village or a group of villages) and locate most new development in or on the edge of existing settlements where employment, housing (including affordable housing), services and other facilities can be provided close together.

This development is both in and on the edge of one of the twin centres of the settlement and as such typifies the instructions given in EC6.

Policy EC7 [EC7.1] says,

'To help deliver the Government's tourism strategy, local planning authorities should support sustainable rural tourism and leisure developments that benefit rural businesses, communities and visitors and which utilise and enrich, rather than harm, the character of the countryside, its towns, villages, buildings and other features. Local planning authorities should, through their local development frameworks:

> a. support the provision and expansion of tourist and visitor facilities in appropriate locations where identified needs are not met by existing facilities in rural service centres, carefully weighing the objective of providing adequate facilities or enhancing visitors' enjoyment or improving the financial viability of the facility with the need to protect landscapes and environmentally sensitive sites, and
>
> b. wherever possible, locate tourist and visitor facilities in existing or replacement buildings, particularly where they are located outside existing settlements. Facilities requiring new buildings in the countryside should, where possible, be provided in, or close to, service centres or villages but may be justified in other locations where the required facilities are required in conjunction with a particular countryside attraction and there are no suitable existing buildings or developed sites available for re-use
>
> c. support extensions to existing tourist accommodation where the scale of the extension is appropriate to its location and where the extension may help to ensure the future viability of such businesses

It is envisaged that the proposals will dovetail with other local proposals to regenerate the settlement and uplift its tourism potential.

Policy EC10: Determining planning applications for economic development

EC10.1 deals with determining applications and says, 'Local planning authorities should adopt a

positive and constructive approach towards planning applications for economic development.

Planning applications that secure sustainable economic growth should be treated favourably.'

EC10.2 All planning applications for economic development should be assessed against the following impact considerations:

a. whether the proposal has been planned over the lifetime of the development to limit carbon dioxide emissions, and minimise vulnerability and provide resilience to, climate change

b. the accessibility of the proposal by a choice of means of transport including walking, cycling, public transport and the car, the effect on local traffic levels and congestion (especially to the trunk road network) after public transport and traffic management measures have been secured

c. whether the proposal secures a high quality and inclusive design which takes the opportunities available for improving the character and quality of the area and the way it functions

d. the impact on economic and physical regeneration in the area including the impact on deprived areas and social inclusion objectives

e. the impact on local employment

Para a. envisages a regional strategy for climate change backed up by a local one. The RSS has been suspended and to our knowledge there is no local strategy specifically aimed at the subject.

The proposals for the conversion/ upgrade will seek to better the current situation through insulation and secondary glazing as far as practicable with a heritage asset.

Para b. is addressed by tying in the facilities as part of a multi-stop journey which will take in the village at large, the Church and Priory. Also, weddings use generates use of multi-person vehicles on the whole – taxis and mini-buses.

Para c. is addressed by the quality and detailing of the submitted design

Para d. and e. are addressed by the potential of the regenerated facility to offer employment opportunities and tidy up this scruffy area of the site.

PolicyEC13: Determining planning applications affecting shops and services in local centres and villages

EC13.1 says, 'When assessing planning applications affecting shops, leisure uses including public houses or services in local centres and villages, local planning authorities should:

take into account the importance of the shop, leisure facility or service to the local community or the economic base of the area if the proposal would result in its loss or change of use'

The proposals seek to provide an important regional facility

3.2 Amount

The proposed amount encompasses the existing floorplates of the buildings with very little extension. The barn including the mezzanine covers approximately 475m2 of which 70m2 are bar

and kitchen and 44m2 café. The lean-to extension is about 19m2 and the link about 5m2. In the Dairy, about 30m2 per floor is reordered.

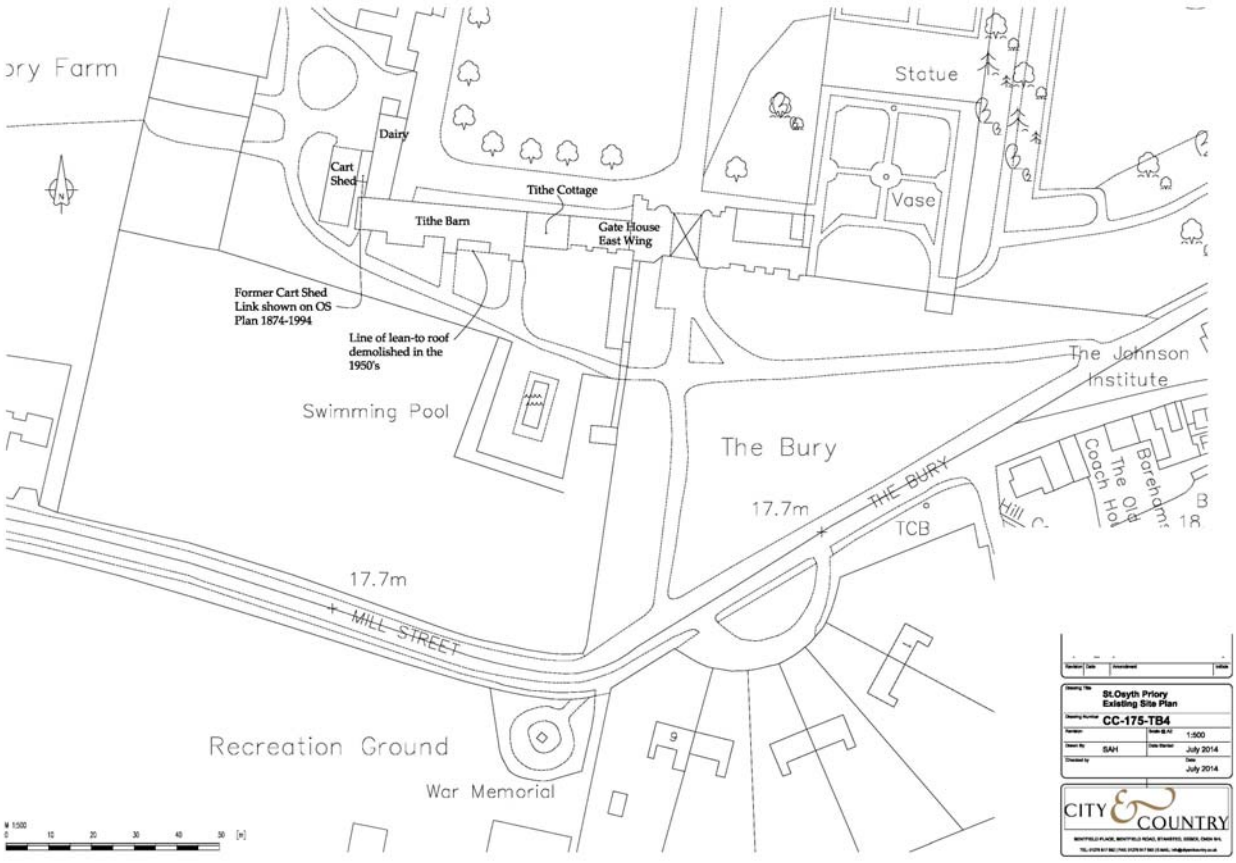
3.3 Layout

The internal layout is deemed to be the optimum based on functional requirements, and the current configuration of the spaces. The main volume would naturally take the seating , with facilities in lean-tos and under the mezzanine. Having the café adjacent to the kitchen also makes sense.

Glazing is maximised by using the existing double doors and midstreys (supplementing them with two rooflights and a reopened window to the west), hence these areas act as foyers.

Level access is possible to café and the dining area which has its own accessible wcs.

The Dairy shares means of escape and wc facilities with the café and shop. The function room in the barn has its own facilities.

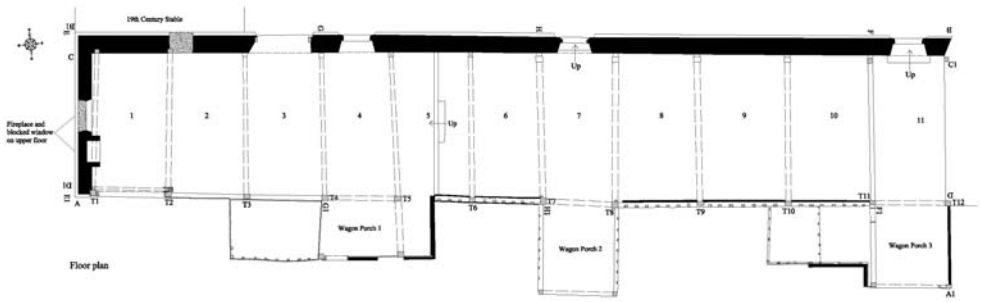


Existing Site

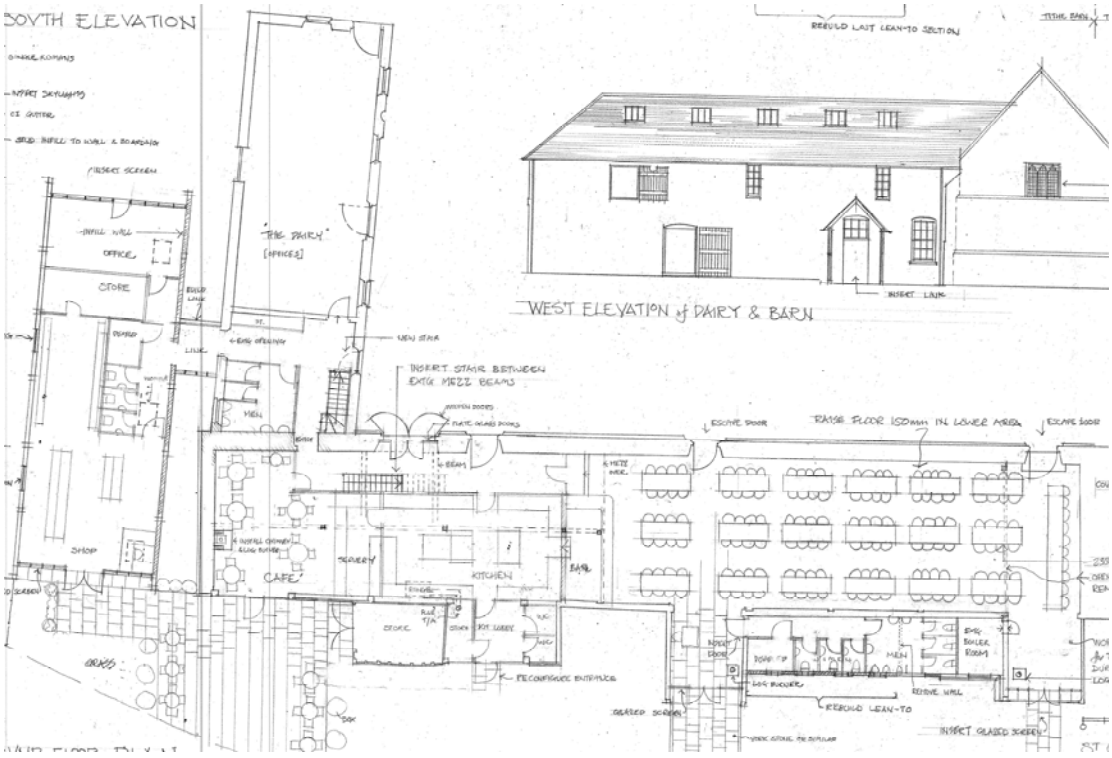
Initial Conceptual Site Plan

- The main entrance for weddings is into the central midstrey and this axis extends into the parking area.
- The parking is under a canopy of oak trees
- Public and private residential areas are separated with the public area centred on the café, shop and central midstrey

Revised Site plan with large central green following EH intervention



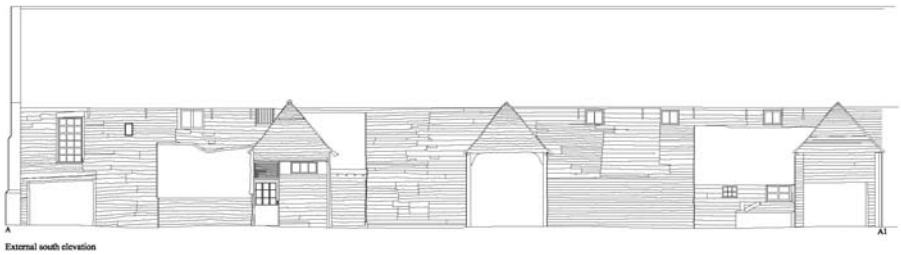
Existing barn plan



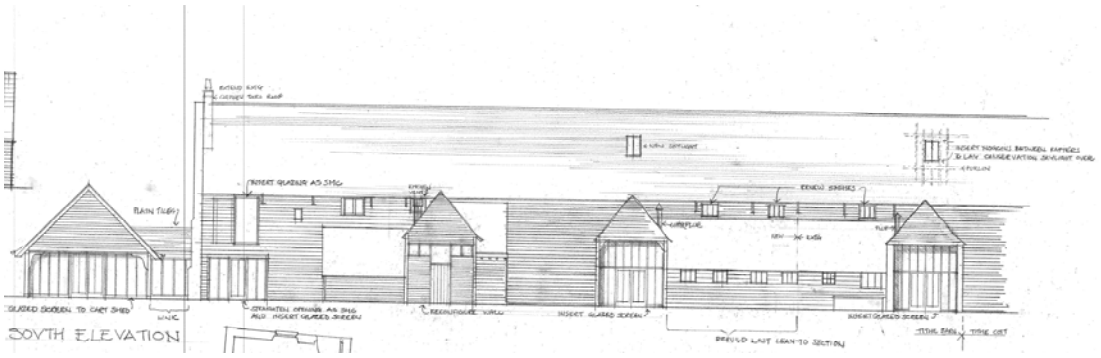
Proposed plan with Dairy and Cart shed

3.4 **Scale**

The proposed interventions are minimal. The key feature of the design is opening up the barn and glazing it to appreciate its internal structure. Reinstated, the two lost structures do not really affect the scale of the building.



Existing South elevation



Proposed South elevation showing glazing, and reinstated structures. Skylights are to be omitted to the Barn as requested by EH

3.5 Landscape

The site has been set out for usefulness and visual impact. The existing paddock was dominated by the swimming pool enclosure. The proposals strengthen the landscape into individual zones so as to remove that dominance and relate the barn and cartshed directly to their outside space. The emphasis has been changed from the original concept to introduce a large central green. Parking will be on either side tucked into the corners of the paddock but still shaded by an oak canopy. The screen planting will be in the manner of a Victorian shelter belt with a high percentage of evergreens.

Existing trees will be retained and augmented to provide a pleasing outlook for the residential buildings as well as the function rooms and café and shop.

3.6 Appearance

The appearance of the group has been considered such that it achieves the design aims – to conserve the buildings, admit light, and utilise them for functions that will help sustain the estate. The design will frame views through the various 'external 'rooms' and will present to the customer a welcoming vernacular with a good architectural flourish. Both in terms of scale and appearance, the design aims to fulfil the requirements of Policy QL9 requiring that 'all new development should make a positive contribution to the quality of the local environment and protect or enhance local character.'

The nasty accretions will be peeled away, the structures repaired and reclad and the two reinstated buildings boarded in Essex style and stained in with the rest of the complex. The new chimney will be in a soft red brick and the flues clad in copper to display their industrial use but blend in with the colouring of the tiles.

3.7 Listed Building issues and heritage impact

Local policy EN17 also requires development to preserve or enhance the character or appearance of the CA. Both documents require consideration of the heritage asset itself and the contribution of the setting to its significance. These policies closely align with EN18 (fascias), EN22 (Alterations to a listed building), EN23 (development near a listed building), EN29 (archaeology) and EN30 (historic towns).

As explained in other sections, matters of scale, massing, historic and proposed layout, appearance, and long views all combine to improve the character of the building and its setting and all of these have been taken into account in the design.

Evidential value

Evidential value derives from the ability of a place to reveal evidence of past human activity. Archaeological Solutions excavated the foundations for the mezzanine and found nothing of merit hence the scheme will not disturb existing archaeology. The reinstated buildings will be on old footings so will also not damage value.

Historical value

Historical value derives from the ways in which past people, events and aspects of life can be connected through a place to the present. Many famous people are associated with the place, from monks to monarchs so associative resonance is high. Retaining the north front unchanged will preserve this value. The illustrative historical value comes via the physical evidence of a tithe barn, cart shed and stable/ cow house which will be preserved intact.

No changes are proposed except the removal of the partitions and midstrey infill and the tiny removal of timber frame for a door in the central midstrey.

Aesthetic and architectural value

Aesthetic value derives from the ways in which people draw sensory and intellectual stimulation from a place. Architectural value is inherent in a form, a detail or a layout. The group scores highly but the setting to the south is especially poor with the dominant swimming pool area in an uneven paddock. The internal structure and general massing is of considerable value.

No changes are proposed to the roof construction and it is intended to conserve the internal timbers and present them better.

The organic development of the place is its chief architectural feature: design value is thus fortuitous rather than conscious as EH say in *Conservation Principles*. The additive nature of the place is a particular feature of St Osyth Priory and the need to recycle and grow gradually is evident everywhere.

The design of the basic group will remain intact apart from small details like the glazed midstreys and flues, all of which a building of this scale can bear. The appearance *will* change but heritage significance is a cultural adjunct and it may be argued that this type of conversion is now culturally assimilated in this part of England. Besides, the original doors are absent, and the change will be reversible.

Communal and social value

English Heritage says, ‘Communal value derives from the meanings of a place for the people who relate to it, or for whom it figures in their collective experience or memory. Communal values are closely bound up with historical (particularly associative) and aesthetic values, but

tend to have additional and specific aspects. The building is of considerable value to the local community in its farmyard use employing local people for eight hundred years. It is not prominent in the street owing to its position behind the estate walls but it is connected with the function that gave the village its reason for existence. As *Conservation Principles* says, it has *Social value,* i.e. it is associated with places that people perceive as a source of identity, distinctiveness, social interaction and coherence…which may be comparatively modest, acquiring communal significance through the passage of time as a result of a collective memory of stories linked to them.

The design seeks to retain this social value by repairing the buildings so as to open them up once more to the public. The external forms will be completely legible and able to be associated with past uses.

3.8 Protected Species

No bat activity has been recorded in the tithe barn or cart shed over the current ownership. Nonetheless, in compliance with policy EN6a, a full bat report will be prepared during week commencing 14th July 2014 and the recommendations complied with.

4. ACCESS

4.1 Vehicular access

4.1.0 Vehicular access to the public car park is to be via the historic entrance to the east side of the yard which comes off the Bury. The sightlines are entirely unencumbered owing to the location of the gate. A 7.5 ton lorry can get access to the kitchen via the private access to the farmyard from No 9 Mill Street. This will cover food and drink and similar deliveries. The routes have been separated in the landscape scheme by farm gates.

Level access will be available from the car park to the central midstrey of the Barn.

4.1.1 Parking and vehicle trips

It is envisaged that numbers will not exceed those reached when the Priory last opened as a functions provider, art gallery and public access garden. In the first instance, access will not be available to general visitors to the Priory; this will be triggered only when the entire complex is repaired and represented.

a. B1 Cart Shed use 20m2 – 1 space
b. A1 use 87m2 – 5 spaces
c. A3 use 44m2 + approx. 70m2 kitchen and bar – 23 spaces
d. D2/ conference use – say 160 covers = 32 spaces
e. Dairy B1 usage already catered for

Add these uses to persons visiting the Priory: 61 + say 30 – 40, hence aim for about 100 cars. The configuration which naturally follows the lines of the paddock throws up 111 in total.

4.1.2 Access for emergency and refuse services

This will be via No 9 Mill Street as at present. Bins are located in front of the Atcost Barn and will continue to be located there; there is no shortage of capacity.

4.2 Pedestrian and Inclusive access

The carpark will have hard surfacing to allow wheelchair access. Level pedestrian access will be possible to all ground floor areas.

4.3 Crime prevention

The layout has been conceived with natural surveillance in mind. The car park and gardens will be policed by the function rooms and restaurant/ café/ shop.

4.4 Bicycles

Bicycle hoops will be provided in the car park.

CONCLUSION

The aim of the applications is to:

1. to gain consent for alternative beneficial uses for the Tithe Barn and Cart Shed at St Osyth Priory that are more valuable than their current uses, still sympathetic to their heritage value and will better assist with their repair, thus providing them with a more secure long term future;
2. to enhance this part of the St Osyth Conservation Area;
3. to provide an enhanced facility and service to the parish, the district, and tourists from further afield;
4. to assist in the successful delivery of the vision of the historic St Osyth Priory Estate to become a significant leisure and tourism venue within Tendring;
5. to align with the stated regeneration aspirations of Tendring District Council;
6. to attract a commercial venture to St Osyth Priory that will invest in the site and in doing so reduce the significant conservation deficit that exists at present.

The applications comprise:

A planning application for **change of use** for the Barn, Cart Shed and part of The Dairy to perform the role of reception for visitors to the Priory park and gardens, incorporating a shop and café. And accommodating offices, function spaces, and a wedding reception venue to support the Darcy House rooms which are approved premises for marriage ceremonies under the Marriage Act.

Listed Building consent for a slightly extended loft to the barn, the opening up of its east end and two of the three midstreys, the reinstatement of the east wall of the cart shed and the installation of some partitions, kitchens, bar, wcs etc and the provision of parking in the adjoining paddock.

The context:

The planning application is about use of land and buildings; it seeks to find a suitable beneficial use for nationally important buildings which are on the "at risk" register, a use that complies with the policies of Tendring District Council and national planning guidance.

The current application is thus put forward as an expeditious means of contributing to achieving the vision for restoring the estate. It is effectively a resubmission of 11/0334/FUL for the creation of a visitor centre in the walled garden – currently the subject of an appeal – not because those proposals were inappropriate but simply to provide a genuine alternative that can be judged at the local level as opposed to having to consider them as part of the planning appeal, saving time and resources for both parties including the public purse.

The application for Listed Building Consent is for the Council's permission to carry out the minimum works required to achieve the uses set out in the planning application.

Both applications fit into the 3-pronged site-wide approach which seeks to find more viable uses for the Priory buildings and to reduce the estate's Conservation Deficit [when the existing value

of the property plus the development cost exceeds the value of the heritage asset after development]. This comprises:

a) enabling development – housing development on a gravel pit outwith the historic park will soon provide funds to begin the work on the most urgent repairs;

b) to attract commercial investment into the estate via a range of tourist and business related ventures within the estate and its buildings, in addition to the residential permissions have been granted for many of the buildings; the current planning application will add to this list; and

c) forming a Trust – that will enable funds to be raised via grant aid to take care of the historic buildings and remains with no beneficial use. In tandem with the current applications, the applicants and owners have secured the assistance of the Prince's Regeneration Trust in forming such a trust.

English Heritage perceive a conflict between forming a trust and providing a commercial use for the Tithe Barn complex[4]. They state that the visitor centre would be "likely to prejudice the operation of any such trust", an approach which the applicants believe to be inappropriate as it closes the door to agreeing a better and more valuable use for buildings "at risk;" EH are confusing ownership and planning matters in an unhelpful manner that will not help these nationally important heritage assets. The approach adopted site-wide and in these applications is to embrace *all* viable options which are sensitive to the heritage assets, especially where there are more substantial, readily available and deliverable funds.

[4] Their letter of 4th July 2014 to TDC Planning Dept.

ory Farm

Statue

Vase

Dairy

Cart Shed

Tithe Cottage

Tithe Barn

Gate House East Wing

Former Cart Shed Link shown on OS Plan 1874-1994

Line of lean-to roof demolished in the 1950's

The Johnson Institute

Swimming Pool

The Bury

17.7m

THE BURY

TCB

17.7m

MILL STREET

Recreation Ground

War Memorial

9

7

N

M 1:500
0 10 20 30 40 50 [m]

Revision	Date	Amendment	Initials
-	---	-	-

Drawing Title
St.Osyth Priory
Existing Site Plan

Drawing Number **CC-175-TB4**

Revision	Scale @ A2 1:500
Drawn By SAH	Date Started July 2014
Checked by	Date July 2014

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