

Period of contract: Development and Delivery Phase - RIBA 1 to RIBA 7;



**Invitation to Tender (ITT)
for
St Osyth Priory and Parish Trust –
Interpretation and Storytelling Consultant**

Submission of Tenders: 17th July 2025

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

Issue date: 19th June 2025



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1.0 THE PROGRAMME

1.1 Introduction

St Osyth Priory and Parish Trust has been awarded Development Phase funding from The National Lottery Heritage Fund, the project 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 Interpretation and Storytelling Consultant to work on the Development and Delivery Phases - RIBA 1 to RIBA 7 of this aspect of the project. Please note the Delivery Phase is subject to successful funding from The National Lottery Heritage Fund.

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

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 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.

Education visits are an important part of programming at St Osyth, with 1173 primary school children visiting in 2023.

There is particular interest in the history and martyrdom of St Osyth, providing opportunities to connect local stories and heritage with the broader history through the ages. Consultation shows the importance to our current audience of local, older adults is not just heritage, but also evokes memories of childhood visits to a special place that before closure welcomed over 20,000 visitors annually. By restoring public access, the Priory's connection with the community will be rebuilt allowing visitors to create new memories with their own children and grandchildren.

The Trust is interested in exploring reusing materials to create art installations, as well as creating interpretative objects and installations from heritage items from the site, including opportunities for planting of flowers and plants.

Interpretation outputs should have target audiences in mind, it should be inclusive whilst also being sympathetic to what is on the site currently.

Interpretation and signage need to be flexible so that core operations such as hires can still take place.

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

2.0 REQUIRED SERVICES

2.1 Interpretation and Storytelling Plan

St Osyth Priory and Parish Trust is seeking to appoint a suitably qualified Consultant to help deliver an Interpretation and Storytelling Plan through innovative curation, interpretation and exhibition design.

You will be working on a site that covers over 1300 years of British History. We would like to understand how to tell the stories from key historic periods related to the site, and present these in innovative ways that foster greater community engagement and connection.

The main aims are to:

1. Reconnect the historic buildings and landscape and re-establish their identity at the heart of the community
2. Help more people learn, enjoy and care about the Estate and its history. Present unique opportunities in a matchless environment to engage with and participate in our heritage
3. Raise the profile of the heritage of the site and engage new audiences with it
4. Interpretation developed in partnership with local people, including new oral history and opportunities for co-production will increase engagement of under-represented audiences.
5. Undertake ongoing focus groups and co-production of interpretation content creation with target audiences
6. Work with the Historian in Residence to capture the outputs of their work and understand how their findings inform the storytelling opportunities
7. Work closely with the Activity Planner and Communities Engagement Officer to develop and deliver co creation
8. Help develop plans for branding and wayfinding based on your work
9. Create a plan for community and temporary exhibitions that support the stories of the site during delivery stage and beyond
10. Develop an Interpretation Plan in line with The National Lottery Heritage Funds good practice guidance for inclusion in the Delivery Phase submission; noting that this is a Heritage Enterprise grant.

You will need to progress storytelling and design development in line with the architectural plans – which will include production of visuals for the Delivery Phase application.

Scope of works:

RIBA Stage 2 – Concept Design

- Hold briefing workshops with the Trust.
- Attend meetings online and in person as required (including Design Team Meetings, Project Team Meetings and workshops)
- Develop the Interpretation Strategy aligned with the project vision and audience needs.
- Develop the graphic strategy.
- Contribute to the concept narrative for exhibitions or interpretive elements.
- Identify and profile target audiences, including accessibility and inclusivity considerations.
- Identify opportunities for acknowledgement of The National Lottery Heritage grant.
- Coordinate with the Multi Disciplinary Design Team and stakeholders to ensure interpretation is embedded early.
- Assist the Project Manager in reviewing the project programme and risk register at regular intervals.
- Assist the Project Manager in development of a procurement strategy.
- Work with the Activity Planning Consultant to ensure that Interpretation Strategy is integrated and joined up with the Activity Plan.
- Support with developing consultation around interpretation outputs and themes.
- Provide input on spatial requirements for interpretive components (e.g., media, displays, interactives).
- Collaborate on early feasibility and content zoning studies.
- Prepare the Interpretation Plan.
- Present RIBA Stage 2 concept to the Trust and The National Lottery Heritage Fund.

RIBA Stage 3 – Spatial Coordination

- Attend meetings online and in person as required (including Design Team Meetings, Project Team Meetings and workshops)
- Refine and finalise the Interpretation Plan, including themes, messages, and delivery methods.
- Refine the graphic strategy.
- Refine strategy for acknowledging the National Lottery Heritage Fund funding.
- Support with any additional consultation around interpretation.
- Coordinate the content hierarchy and spatial relationships between interpretive elements.
- Work with designers to translate narrative content into physical spaces.
- Develop outline content schedules, object lists, graphic schedules and media requirements.
- Ensure interpretation requirements are integrated into architectural and services coordination (e.g., lighting, AV, power).
- Contribute to risk registers for content, copyright, and community consultation.
- Assist the Project Manager in the development of a procurement strategy.
- Refine the Interpretation Plan.

- Prepare a fully costed Interpretation Plan for inclusion in the Delivery Phase application to The National Heritage Lottery Fund.
- Present RIBA Stage 3 scheme to the Trust and The National Lottery Heritage Fund.
- Draft and finalise briefs as required (AV, Illustration, Artists etc)
- Contribute to Development Phase evaluation as required.

RIBA Stage 4 – Technical Design

- Hold technical design workshops with the client and incorporate feedback into RIBA Stage 4 designs.
- Produce detailed interpretation specifications (graphics, digital media, etc.).
- Finalise object and content lists in coordination with curators and stakeholders.
- Coordinate with fabricators, digital teams, and conservation specialists on technical delivery.
- Review and approve design packages related to interpretive elements.
- Ensure integration with architecture, structural, environmental, Services and AV systems.
- Contribute to Risk, Programme and Procurement meetings and provide feedback to the Project Manager.
- Contribute to procurement documentation for interpretive elements and content development.
- Contribute to evaluation of tenders as required.
- Attend meetings with the Trust and Project Team as required.

RIBA Stage 5 – Manufacturing and Construction

- Oversee the production and installation of interpretive components:
- Supervise graphic production, AV integration, interactive elements, and text panels.
- Carry out quality control checks during fabrication and site installation.
- Support coordination between interpretive contractors and main works contractors.
- Ensure interpretive elements are installed as per approved designs and align with the interpretation strategy.
- Provide input on any required site adaptations or revisions.
- Attend meetings with the Trust and Project Team as required.

RIBA Stage 6 – Handover

- Review and sign off completed interpretive installations.
- Coordinate snagging and final adjustments to displays, AV, and interactives.
- Ensure content meets accessibility, safety, and conservation standards.
- Support staff training on interpretive elements and maintenance (e.g., digital systems).
- Deliver as-built interpretation documentation, including maintenance and operational guidance.
- Participate in post-installation evaluation (audience feedback, walkthroughs).
- Attend meetings with the Trust and Project Team as required.

RIBA Stage 7 – In Use

- Support post-occupancy evaluation of interpretive elements (engagement levels, accessibility, usability).
- Advise on content updates, digital maintenance cycles, and seasonal programming.
- Assist in developing a long-term content refresh or rotation strategy.
- Contribute to lessons learned and evaluation reports.
- Support ongoing engagement strategies linked to interpretation (e.g., community programmes, learning tools).

Maximum Contract Value for the Development Phase - £25,000 excluding VAT. Inclusive of expenses.

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.
- 3.1.7 This ITT does not constitute an offer and St Osyth Priory and Parish Trust does not undertake to accept any tender. St Osyth Priory and Parish Trust reserves the right to accept a Tender in part, rather than in full.
- 3.1.8 Whilst the information contained in this ITT is believed to be correct at the time of issue neither St Osyth Priory and 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 and 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 and 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 tender requirements, they may submit clarification questions via email system. This opportunity exists until the deadline of 3rd July 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 and 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 and Parish Trust, the clarification is not confidential, St Osyth Priory and 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 and 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 and 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%		
	3 x case studies demonstrating relevant experience	30%
	Key Project Personnel	15%
	Project Execution including community & stakeholder engagement	20%
	Social Value	5%
Price - 30%		
	Cost Proposals	30%

3.6 Tender Contents and Scoring Methodology

3.6.1 What to include

For additional guidance for how St Osyth Priory and 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 3 x 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. **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.
3. **Community and Stakeholder Engagement.** St Osyth Priory and Parish Trust is an organisation that works with, and across, a number of 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. Tell us how you would propose delivering against the brief, and why.
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 each and 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.

Tender – 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
Key Project Personnel	0 to 5	
Project Execution	0 to 5	
Added Value	0 to 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 tender or is otherwise incapable of evaluation.	Wholly unsatisfactory
1	The response does not demonstrate an understanding of St Osyth Priory and Parish Trust's requirements as defined in this tender and is incomplete or is otherwise unconvincing in significant respects.	Unsatisfactory
2	The response demonstrates only a limited understanding of St Osyth Priory and Parish Trust's requirements as defined in this tender, lacks detail or is not convincing in some respects	Cause for concern

Score	Rationale/Judgment	General Description
3	The response demonstrates an understanding of, and compliance with St Osyth Priory and Parish Trust's requirements as defined in this tender.	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 and Parish Trust's requirements as defined in this tender.	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 tender.	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.

Tender – Price (30%)

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

Tenderer with the lowest price 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%	18.65%	15.22%

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 Interviews / Presentations

- 3.7.1 As part of the tender evaluation process bidders may be required to make a presentation or attend an interview online. Bidders will be notified as soon as possible if they are required to give a presentation or attend an interview. 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 available online	19 th June 2025
Formal Site Visits	Upon request, subject to availability
Deadline for receipt of Clarification Questions	3 rd July 2025
Tender returns: Tender Submission Deadline	17 th July 2025
Tender Evaluation Period and Clarification Meetings	18 th – 31 st July 2025
Confirmation of contract award	1 st August 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.