

Conservation Management Plan (buildings) Consultant

Role:	Prepare a Conservation Management Plan for the buildings and site at Tiverton Museum of Mid Devon Life
Location:	Working from home and at Tiverton Museum of Mid Devon Life, Devon
Fee:	£20,834 plus VAT (to include all associated costs)
Status:	Freelance Consultant
Reporting to:	Pippa Griffith, Museum Director
Period of contract:	Fixed term, to be completed by 24/05/2024

Introduction

This brief sets out the requirements for producing a Conservation Management Plan (CMP) for the buildings and site of Tiverton Museum of Mid Devon Life. The aim of the CMP is to identify, assess and help retain the significance of the site in any future management, maintenance, repair, alteration or new development projects.

The CMP will be used to inform and enable our vision for the Museum including preparation of proposals for development to sustain the Museum in the future by:

- Understanding the significances of the buildings and site
- Conserving significances
- Making best use of the buildings and site to enhance engagement and the visitor experience including providing multi-functional space for community events.
- Redesigning the gallery spaces and visitor facilities, maximising the opportunities to reveal and interpret the historic school building and its features.
- Improving collections care conditions
- Improving the care of the historic building
- Maximising income including commercial income.
- Setting out our long-term maintenance and management strategy.

It is intended to ensure appropriate long-term management and care of the Museum site in a way that reflects the significance and character of the place.

Reasons for commissioning the Plan

The Conservation Management Plan is being prepared for the Museum to inform and shape our:

- long term management strategy
- proposals for repair and conservation including planned maintenance
- development of proposals for major capital works to enhance the museum, engage more visitors and generate future income

1. Background

1.1 Tiverton Museum is a vibrant, award-winning and much-loved museum that provides extensive displays on the history of Mid Devon; a lively events programme, including temporary exhibitions, guided walks, talks, holiday craft activities and lots more. The museum contributes to the local economy as a key visitor attraction and works closely with its local community. We offer a range of activities for schools and families and are an important resource in an area where poverty and geographical factors increase the

risk of isolation. The museum makes it possible for teachers and parents to access good quality learning opportunities outside the classroom. We also provide a successful reminiscence service for older people in care and residential homes. The museum runs the town's Tourist Information Service.

- 1.2 Tiverton Museum has secured a National Lottery Heritage Fund grant, for a project 'Strengthening our foundations; building our future'. The overall project includes essential development work to strengthen the organisation's resilience and determine the longer-term redevelopment plans through several strands of work, including:
- To understand the historic building better by commissioning a measured building survey, a building energy audit and Conservation Management Plan which will enable us to better care for this historic asset, and improve management of our built heritage for the long term.
 - Commission architectural plans to RIBA stage 2 with environmental sustainability at the heart.
 - An outline interpretation strategy to steer future improvements in managing and sharing our heritage, including significant community consultation to ensure that we do so in a meaningful way (to RIBA work stage 1).

This project has two phases of impact. The first is to make essential, immediate changes to the museum by increasing volunteer capacity and significantly improve our environmental sustainability.

The second will contribute to medium term plans for a capital redevelopment project. A capital redevelopment will allow the museum to make the most of its large site to improve the visitor experience, provide space for events and activities and maximise commercial income whilst improving the building and collections care conditions. A feasibility study for this was carried out in 2018, followed by a revised concept plan in 2021. The re-development is an exciting project that will enhance our galleries and create new areas for community events, activities and learning. We see the new Tiverton Museum as playing a major role in the regeneration of the town, enabling people to engage with Tiverton and Mid Devon's heritage through new interpretation, displays and programming that focuses on community life, past, present and future.

Description of the Museum and site

Tiverton Museum of Mid Devon Life is an Accredited Museum. It holds one of the largest social history collections in the South West. The Museum is a Charitable Incorporated Organization with a board of Trustees and a small staff headed by the Museum Director.

The Museum was founded in 1960. In 1969 it moved to its current location in the town centre of Tiverton. The Museum buildings comprise the Tudor style former National School building of 1844, facing historic St. Andrew's Street, to which later extensions and a separate range of galleries have been added to accommodate the growing collections. The Museum was refurbished in 2001.

Tiverton Museum is based in a group of buildings on a town centre site in the Tiverton Conservation Area. The buildings comprise

- The Grade II listed (List entry number: 1384896) former National School building of 1844, converted into the Museum's premises after acquisition in 1968.
- Late 20th century additions including the single storey entrance foyer and reception; a 2-storey range comprising shop and visitor toilets on the ground floor and office and work spaces on the first floor; and 2-storey collection store.
- Ground floor area totals 560 sq m. First floor area totals 486 sq m.

- Late 20th century detached single-storey ranges comprising Alford Gallery (232 sq m) and Locomotive Hall (167 sq m).

Current uses

The Museum is open all year. We provide a lively programme of events and exhibitions, and we pride ourselves on being a family friendly attraction. We are a Devon Records Office Service Point and a have well- used local history library.

Existing Documentation

The consultant should take account of existing documents relating to the Museum that are available to inform the plan, including:

- *Tiverton Museum Feasibility Study May 2018* by West Waddy ADP.
- *Initial Concept paper 2021* by Thread Architects.
- *Building Condition report 2021* by Philip Hughes Associates.
- *Building Energy Audit* to be commissioned as part of this funded project.
- *Measured Building survey* to be commissioned as part of this funded project.

Key external sources should be checked including those held by the local authorities, such as Mid Devon District Council's *Tiverton Conservation Area Appraisal*
<https://www.middevon.gov.uk/residents/planning/conservation/conservation-areas/conservation-area-appraisals/tiverton-conservation-area-appraisal-and-management-plan/>

and the Devon Historic Environment Record

<https://www.devon.gov.uk/historicenvironment/the-devon-historic-environment-record/>

1 Objective

An experienced consultant is required to develop a Conservation Management Plan for the Museum site that will enable the CIO to manage and develop it for the benefit of the community. It will help create a clearer understanding of all aspects of the significance of the Museum site, the historic former school and associated buildings, but not the Museum collection. It will identify issues, threats and opportunities. It will inform and support the development of detailed proposals for the museum's redevelopment, and future fundraising applications to implement those proposals (needing to meet NLHF requirements for a development stage application). It will shape the brief for the architect for the Delivery Phase of the redevelopment project. It will guide assessment and understanding of the impact of future development, management, and maintenance.

What the CMP should cover

The CMP should cover the whole site of the Museum. This will include

- the principal Grade II listed historic museum building, all associated buildings, and open spaces; outdoor features and interior fixtures and fittings; archaeology; ecology. The CMP will not in general include the Museum collection, but it will take into account that some exterior and interior fixtures - such as the waterwheel and the 18th-century staircase from Bampton House used by visitors - are part of the Museum's collection.
- A space-by-space gazetteer across all floors of the principal former school building. This will follow the room numbering used in the building condition survey and survey plans It will identify and set out historic uses/ names/ the periods of use where known.
- Current uses/ mix of uses of all buildings and spaces and issues

The consultant will conduct the following tasks:

- Undertake survey and research about the buildings and site, identifying significant features and elements.
- Meet/ consult/ work with key stakeholders – particularly the Tiverton Museum CMP Working Group and relevant Trustees, Staff and Volunteers - in the preparation of the CMP, and to manage the programme of involvement and consultation.
- Engage with our visitors and local community about the building. This may involve including the local community in the research the history of the building when it was used as a school (and Sunday school) gathering memories and old photographs.
- Gather and analyse existing relevant information, identifying gaps in knowledge that need to be addressed.
- Carry out historical research into primary sources (where existing research requires enhancement). Signpost towards existing work and identify subject areas for further research
- Carry out site survey and investigation and ground-truth information from existing surveys.
- Create a series of plans showing the development of the site over time.
- Prepare an ecological assessment.
- Prepare a gazetteer identifying individual elements of the site, their significance, management issues and conservation objectives. This will need to take account of historic fixtures and fittings and collection items physically incorporated into the buildings/ site.
- Take account of the building condition survey by Philip Hughes Associates
- Take account of the environmental performance assessment of the buildings.
- Identify all the aspects of significance of the site and how they have developed over time. Create a synthesis of the gathered information.
- Become familiar with the site's management background to describe how it operates. This will include summarising the main points from relevant documents.
- Work with key stakeholders to identify issues, risks and opportunities.
- Work with key stakeholders to develop management policies including the approach to future redevelopment.
- Provide management recommendations.

Content and format of the CMP

This Conservation Management Plan should take account of the structure and guidance and follow the format described in the current Heritage Fund Conservation Planning guidance

<https://www.heritagefund.org.uk/publications/conservation-planning-guidance>

The plan will include the following headings [see below for more detail]

Executive summary.

Introduction

Understanding the asset (buildings and site)

Management Information

Gazetteer

Assessment of significance/ values

Issues, Risks and Opportunities:

Management Policies

Management actions

Sources/ Bibliography

Appendices

NLHF logos / stamps as laid out in the document 'Acknowledging Your Grant'

A key element of the CMP will be the overall tone and style of the writing. It will be used by a range of people so the plan needs to be

- academically rigorous but entirely accessible; informative but engaging; concise but comprehensive.
- written in plain English in a style that is accessible to a wide range of audiences.
- Sources used must be referenced.
- easy to use as a working document and should be presented in an editable format that can be easily updated.

Executive summary

This should be a brief summary of the main points in the Conservation Management Plan, referenced to the main body of the CMP. It should include

- a short statement which pulls out the key significances and why people care about them
- the key policies for its conservation
- recommendations for actions
- the reasons for producing a conservation management plan at this time
- a table that states the publication date and the date when it will be reviewed

Introduction

This should include

- The CMP's purpose
- How to use the CMP
- Names of the people who commissioned the Conservation Management Plan and of all authors and contributors
- An overview of who participated and who was consulted
- An outline of the scope of the plan and how and when it will be reviewed
- A summary of main sources used
- Other relevant documents and management tools such as activity plans, business plans, feasibility studies, maintenance plans, access policies, emergency plans
- A record of any gaps in information, including any limitations

Understanding the asset

This will describe each of the different kinds of heritage on the site including buildings, archaeology, landscapes/ townscape, industrial heritage, social history, ecology. It should

- Include intangible heritage, such as existing oral history material.
- Include the local context of the surrounding environment.
- Set out the history of how the site has developed over time from the earliest times to the present day, using historical sources, maps and archaeological evidence.
- Provide illustrations e.g. historic images, historic map overlays, phase plans showing the development over key periods.
- Describe the wider context of the heritage in relation to other sites of comparable type or date.

Management information

This will explain

- How the site has been managed in the past and is managed today.
- Current policies in place for managing the heritage, and the management standards to be met as a result of the site's protection or designation.

Any detailed supporting information, such as a site gazetteer, Conservation Area map and appraisal, area character appraisal, survey or audit reports should be contained in appendices.

Drawing on the documents identified and through consultation with key stakeholders the author will need to become familiar with the Museum's management background to describe how it operates today. This information will also be used later in the plan to develop policies/objectives that are consistent with local, regional or national strategies, or with relevant legislation or standards. The main points of key relevant documents should be summarised, and the documents should be listed in the bibliography, and the most relevant included in Appendices.

The information to be collected will include: (this will not involve new surveys and will be drawn from existing data):

- Statutory designation, conservation or registration documents (local, regional, national or international);
- Information about who uses the site today – how and why;
- A conservation history – any previous reports on condition surveys, repairs, conservation, restoration, development or other action;
- Current management requirements or standards that need to be met (e.g. health and safety, disability access and environmental health);
- Relevant planning policy documents such as statutory plans or other strategic plans;
- Current management policies adopted by the organisation, including training, access or education policies, health and safety policies and so on;
- Any relevant leases or management agreements for the site;
- Any other local, regional or national strategies that are relevant to the site, such as regeneration strategies.

Gazetteer

The consultant will prepare a detailed gazetteer for the Museum to an agreed template. This will capture information about all the different elements of heritage. It will involve fieldwork to identify the main areas (character areas), elements and features, and will use the background research assembled from existing documents.

The format of the gazetteer will be agreed with the Tiverton Museum CMP Working Group, coherence and consistency across the character areas. Each element or feature should be numbered, photographed and related to a base map.

Each entry should include:

- Name of the element or feature (e.g. Heathcoat Gallery)
- Photograph and map or plan marked up to show the space/ feature
- Description of the element or feature
- Designations e.g. listed building, Conservation Area
- History (noting sources relied on)
- Description of what is known to have been lost, removed or altered
- Description of features that are linked to, significant or critical to the area or element
- Graded assessment of each aspect of significance e.g. building; archaeology; ecology; social history; townscape; and based on these an overall significance assessment. The following gradings will be used
 - A highly significant (national/ international importance)
 - B significant (regional importance)
 - C some significance (local importance)
 - N neutral (does not add or subtract from significance)
 - D detracts from the significance
- Explanation of Significance that sets out the reasons for the grading
- Condition, Issues and Vulnerabilities/ risks
- Management recommendations

- Sources: referencing relevant reports or information sources linked to a bibliography

Assessment of significance/ values

The consultant should prepare a statement of significance for the Museum site, setting out what is significant, why it is significant and to whom. It should

- explain clearly and succinctly how and on what basis the assessments of significance have been prepared, and who has been involved or consulted in preparing it.
- Cover each of the different types of heritage on the site. It must cover the heritage as a whole, but also
- Identify the specific values of individual parts/ aspects in more detail in the gazetteer (see below).
- It must include local context: where the heritage is, what is nearby, what contribution the site makes to the wider heritage of its location.
- It should provide detailed information about the significance of different parts of the asset, identifying things that are crucial and cannot be lost or compromised, and those of lesser value.
- Include contextual comparisons e.g. the relative significance of the historic school building compared with others.
- If there are things that appear to have little value or detract from the value of the heritage it should explain why they are not valued.

The following significance categories/ levels will be used, with explanations of the assessment in each case

- A highly significant (national/ international importance);
- B significant (regional importance);
- C some significance (local importance);
- N neutral (does not add or subtract from significance),
- D detracts from the significance

Guidance on assessing significance is given in Historic England's *Conservation Principles* consultation draft.

<https://historicengland.org.uk/content/docs/guidance/conservation-principles-consultation-draft-pdf/>

This is subject to replacement by published revised *Conservation Principles, Policies and Guidance*.

Issues, Risks and Opportunities

The consultant will work with key stakeholders to produce a clear statement of issues and opportunities affecting the buildings, spaces and site in the short, medium and long term, including

- how and why the significances may be vulnerable
- any potential threats to long-term survival.
- identify any conflicts between different significance/ values for the site.
- identify opportunities for enhancing the conservation condition and significance of the site, including conserving the historic building and site and better revealing their value, increasing access, providing better visitor facilities, improving the condition of the site and how it is managed for the benefit of people and society.

This may include for example

- Improved visitor access and visitor facilities
- Potential restoration/ revealing/ opening to visitors of altered spaces
- Use/ re-use/ change of use of built and open spaces to maximise conservation, engagement, operational and commercial potential. To include: visitor reception and

- circulation, gallery space, learning and activities spaces including lettable space, collection storage, office space, retail, Tourist Information Centre and catering
- Liaison with local communities and local authorities.
- The wider townscape setting and possibilities for partnership working
- Impact of local development, current or proposed
- Environmental sustainability
- Parking

Management Policies

This section will set out the guiding principles for use to look after the Museum's heritage. These principles should be informed by the previous sections of the Conservation Management Plan.

The consultant will use the understanding of the site and the assessment of significance and in close consultation with Tiverton Museum CMP Working Group and other stakeholders produce a set of conservation management policies for the site. These policies will be specific to the needs of the site and will be used as a basis for guiding the care, use, development, restoration and alteration of the site.

There should be clear, cross-referenced links between the summary of the heritage value, the risks and opportunities, and policies that relate to the site. These policies should, at a minimum, aim to:

- define an overall conservation philosophy for the site;
- safeguard the significance of the site;
- identify zones of sensitivity and appropriate uses of the site;
- satisfy statutory requirements;
- prevent future damage or deterioration;

Policies should be written as a series of aims and objectives specific to the Museum's heritage. They should be consistent with local, regional, national or international policies and regulations and relevant conservation standards that the Museum needs to meet. They should include:

- Conservation, maintenance and repair including guidelines for the principles that should be applied to works of repair and conservation
- How we will resolve any conflicts between different types of heritage
- How we will meet conservation standards for each kind of heritage
- Making changes: how we will ensure that any new design or building work is based on a proper understanding of the value of the heritage; does not damage it unnecessarily; follows an appropriate approach to restoration, reconstruction and the reinstatement of lost features; is located in an appropriate place; is of a suitable scale and does not impact on the setting of important features; anticipates the potential impact of the works on the different kinds of heritage and includes actions to reduce the impact (e.g. archaeological excavation); is designed by professionals with the necessary skills (e.g. accreditation); is carried out by people with appropriate skills using suitable materials.
- Ensuring we have an access policy which sets out how we will improve access without damaging the heritage; ensure that access improvements are appropriate to the site; provide alternative solutions, where physical access is not possible.
- How we will tackle the identified environmental risks, including dealing with changing climate conditions; and reducing negative impacts on the environment through the way we manage the heritage.
- How we will manage the information we hold about the site and how we use it to inform decision making, including storing information, updating it and ensuring it is accessible in the future; ensuring that volunteers, staff, trustees and contractors have access to relevant information about the heritage so that they can perform their tasks

appropriately; how we inform the public about the heritage and how we are looking after it.

Management Actions:

Based on the understanding, significance, issues and opportunities and linked to the policies, the consultant will develop and set out a series of prioritised management actions. These will be agreed in consultation with the Tiverton Museum CMP Working Group. They will be divided into short term (1-5 years), medium term (5-10 years) and long term (10-20 years and beyond) goals, within these time periods highlighting the priority actions.

Sources/ Bibliography

This should list all the primary and secondary source materials consulted in working through the conservation planning process and where these documents can be found. It will include:

- Publications
- Designation records, Conservation Area appraisals etc.
- Maps, plans, paintings, drawings, prints and photographs
- Archival material
- Archaeological surveys and other investigations such as archaeological excavations
- Previous condition surveys
- Wildlife or habitat surveys

Appendices

These should contain any information that is vital to the management of the object, building or site but that is too detailed to put in the main section of the Conservation Management Plan. It will include any particularly relevant reports, including any new work carried out as part of the conservation planning process.

CMP consultation

The consultant will involve stakeholders in the CMP and manage a programme of involvement and consultation, working with the Tiverton Museum CMP Working Group. People / organisations that will need to be involved as appropriate in preparing the plan include:

- Tiverton Museum CMP Working Group (relevant museum staff, trustees and volunteers)
- Mid Devon District and Devon County Council conservation and archaeology staff
- The Town Council
- The local community

CMP management & monitoring

The CMP will be managed by the consultant in conjunction with the Tiverton Museum CMP Working Group (membership to be agreed by the client), which will be led by the Museum Director. The consultant will meet with the CMP Working Group at agreed intervals to review progress of the CMP. The main contact on matters relating to the development of the CMP will be the Museum Director.

The CMP Working Group will meet with the consultant at the following stages in the production of the CMP:

- After the consultant has been appointed, to agree the work programme, dates for review gateways, and extent of wider consultation (this will agree dates for future meetings); and to confirm the format of the CMP
- When the draft **Gazetteer, Understanding the Asset** and **Assessment of significance/ values** sections have been produced;
- When the draft **Issues, Risks and Opportunities** and **Policies** sections have been produced, to consider also proposed **Management Actions**;

- When the first full draft of the CMP has been completed;
- And informally at other times with individual members of the working group as appropriate.

Responsibilities

The consultant will be responsible for the programme of involvement and consultation in preparation of the CMP. The Museum Director will be responsible for ensuring that staff and volunteers attend appropriate meetings. The Museum Director and trustees will be responsible for adopting the completed Conservation Management Plan.

Format and publication

The CMP should include an introduction including a short section on how to use the report, a summary of main sources and who was consulted during the creation of the CMP.

The final version of the completed CMP will be provided in both hard copy and digital formats. Hard copy will be an A4 bound document with photographs and illustrations set within the text. Where legibility may be an issue maps and plans should be A3 folded to A4. Reduced copies of maps and plans should be provided in the text. Full-size copies of maps, plans, and drawings should be provided on a stable medium (a material that will last for a long time).

Digital copies should be in an agreed format that is flexible to use and update as necessary e.g. both Word and pdf(A) versions, together with illustrations and digital map overlays, so that text and illustrations can be easily selected, copied or amended. High resolution scans of historic maps and plans (e.g. Estate maps, Tithe, Ordnance Survey Drawings, and later OS editions) should be included in digital format and where possible map layers created in a pdf format and geo-referenced so that they can be overlain as a series of computer graphic layers and switched on and off for direct comparison.

The Gazetteer and other supporting information should be provided as separate bound hard copy and digital appendices.

8 bound copies of the final CMP should be provided. The digital copies should be provided on memory sticks/ flash drives from which further copies can be made. The contractor is to provide 2 copies.

Copyright and confidentiality

Copyright for the completed Conservation Management Plan lies with Tiverton Museum of Mid Devon Life, however, by depositing this report, the author of the material retains the intellectual copyright and will be identified as the author of all project documentation and reports as specified in the Copyright, Designs and Patents Act 1988 (chapter IV, section 79) with full acknowledgement in any publication of the work.

The consultant should obtain copyright permission for any illustrations or other material used during the preparation of the CMP.

Archiving

All new material that was collected during the preparation of the CMP should be submitted with the CMP as an archive in A4 bound folders to be retained by Tiverton Museum of Mid Devon Life. High resolution digital copies of all significant images and maps collected during the creation of the CMP should be included in the archive.

2 Selection Criteria/ Consultant Skills

The lead consultant should be an experienced project manager with a proven track record in producing effective conservation management plans. If subcontractors are going to be used their experience and knowledge must be included in the tender document.

We require demonstrable understanding and experience in:

- Conservation management planning
- Previous National Lottery Heritage Fund funded projects
- Team working with museum staff
- Setting realistic targets and methods of project evaluation
- Strong report writing skills

3 Timetable

- Closing date for tenders is 26/02/2024
- The candidates will be shortlisted by the Director and the Trustees.
- Interviews will take place between 18-22/03/2024
- The work should ideally begin by 02/04/2024
- The report should be presented to the Museum by 24/05/2024

4 Costings and payment schedule

The tender costs should include travel and all other costs associated with the work.

Suggested payment will be 25% upon appointment, 50% for the first draft and 25% on receiving the final report and presentation

5 Proposal

Your proposal to undertake this project should include:

- Credentials for the company and all those who will have input into the work.
- Examples of similar projects undertaken.
- A methodology of how you propose to meet the requirements of the brief.
- A programme indicating how you would deliver the project and key dates for tasks.
- A costing breakdown.
- Details of two referees for whom you have done similar work.

Please email applications to Pippa Griffith, Director at director@tivertonmuseum.org.uk. For an informal chat please contact Pippa on 01884 256295.