



COWDRAY HERITAGE TRUST

Planning for the Future of Cowdray Ruins



Options Study & Feasibility Analysis Profes-
sional Services Brief



Cowdray Heritage Trust

Planning for the Future of Cowdray Ruins

I - Introduction

The Cowdray Heritage Trust has been awarded a Heritage grant by the National Lottery Heritage Fund (NLHF) towards the costs of our Planning for the Future of Cowdray Ruins project.

As a key part of this project the Cowdray Heritage Trust (CHT) is seeking to appoint an experienced business and attraction development consultancy to undertake an Options Study & Feasibility Analysis to identify and inform development of a financially sustainable business model for the future of the site. The scope of the commission is set out in section 4.1.

The successful bidder will be appointed on a consultancy basis and will be responsible for their own tax reporting. The consultancy can be a suitably experienced individual, company or association of professionals.

The Cowdray Ruins is located within the Cowdray Park estate on the edge of the historic town of Midhurst in West Sussex.

The Planning for the Future of Cowdray Ruins project is described in greater detail in Section 3.0.

I.1 - Ruins

Cowdray Ruins is one of England's most important early Tudor houses and is known to have been visited by both King Henry VIII and Queen Elizabeth I. In September 1793, whilst undergoing repairs and refurbishments for the impending marriage of the 8th Viscount Montague, a devastating fire took hold and most of the property was destroyed.

The magnificent ruins are both a Scheduled Ancient Monument and Grade I listed. The site forms part of the Cowdray Estate and is set within the stunning landscape of Cowdray Park (Grade I Registered Park & Garden), in the heart of the South Downs National Park. Since 1793 it largely remained untouched until the 1st Viscount Cowdray commissioned a restoration project between 1909-1914. This work is generally credited with having saved the Cowdray ruins from total collapse.

Cowdray re-opened to the public in March 2007. The opening followed an intricate and detailed two-year 'restoration, stabilisation, access and interpretation' project, funded by a Heritage Lottery Fund grant and support from English Heritage, the Cowdray Estate, individuals and the local community.

1.2 Cowdray Heritage Trust

Cowdray today is in the care of the Cowdray Heritage Trust (CHT), an independent charity (No. 1071069) and held on a long lease from the Cowdray Estate. CHT's stated objects are to preserve, maintain, improve and manage for the public benefit the ruins of the Tudor mansion at Cowdray Ruins and to facilitate and encourage access to and appreciation of the ruins by the general public.

The Trust currently has one paid member of staff (Operations Manager) plus seasonal staff, three Trustees and a Company Secretary. Additional support is provided by the professional and experienced staff of the surrounding 16,500 acre Cowdray Estate. The estate belongs to Viscount Cowdray, whose family have owned it since 1908. We anticipate that the Estate will be fully consulted in developing the Options Study. The Chief Executive Officer of the Estate is a key member of the Project Steering Group.

2.0 Challenges

The 2018 condition survey revealed that a number of areas of the ruins are in need of urgent repair and stabilisation. Elements of the structure were found to be unstable and the risk from falling masonry and stonework is such that the site is deemed unsafe. As a consequence, Cowdray Ruins has been closed to the public. Since this time, with the exception of a handful of specialist guided tours and events, there has been no public access to this atmospheric and historically significant site.

Prior to the closure, visitor numbers were in decline and had fallen well short of the ambitious and unrealistic predictions made in the business plan that accompanied the previous HLF-funded capital works scheme (2003-7). The shortfall in income has seen CHT struggle to meet annual maintenance and operating costs. Closure is compounding this problem further. Without viable and sufficient income streams the Ruins cannot be adequately maintained or safely operated.

The current repairs are estimated at circa £750k, including contingency and professional fees, but to justify ongoing investment on this scale there must be a convincing business case in place. That case must be based on diversifying and expanding the visitor offer and identifying realistic supplementary income generation opportunities in order to build a more sustainable future. New ways of operating are required; this includes a review of the organisation and recommendations on the way forward.

3.0 Resilient Heritage Project

In order to address the issues identified, CHT has been successful in securing a National Lottery Heritage Fund grant to undertake a comprehensive Options Study & Feasibility Analysis to identify the key deliverables required to achieve a sustainable future for the Ruins.

The work should result in a set of recommendations and a business case to achieve a financially sustainable business model for the future of the site. The Options and Feasibility study should be realistic and it is acknowledged that there is a risk that the work may conclude that a fully sustainable future is not achievable.

4.0 Options and Feasibility study

Surrounding and in very close proximity to the Ruins are a number of other listed buildings and structures including a granary, former stables, dairy and a small visitor centre. In addition, there is a rugby pitch directly to the rear of the Ruins. These all form part of the Cowdray Estate and at present are operated independently of the Ruins. The Options Study should consider how the Ruins and associated assets are currently used and managed with a view to how some or all of these assets could be:

- integrated with the Ruins visitor offer to create a far more engaging and holistic visitor experience;
- used to maximise revenue income;
- managed to create a year round visitor offer rather than the current seasonal approach.

A summary of the heritage assets which could form part of this study is available on request. Areas of the Ruins, the Chapel and Great Hall for example, have fantastic potential for use as venues for performances, weddings and events but at present the completely open and unprotected nature of these spaces greatly limits the market. Equally, the Tower Room and Cellars could become atmospheric spaces for events and functions. Of course the listed building and scheduled monument status of the various assets needs to be a primary consideration in any proposals and in this respect we have retained the services of a number of heritage specialists to provide advice and guidance to support the options / feasibility work. The specialists include a heritage consultant, project manager, conservation architect and quantity surveyor who will work with the successful consultant to explore the art of the possible.

Alongside but separate to this commission CHT is working with a local provider to undertake a Governance Review to examine our current approach to governance, including identification of skills gaps and examining our ways of decision-making, working and leadership, policies and practices.

4.1 Scope

It is anticipated that that the successful consultant will deliver the work in a number of linked packages broadly described below. However, bidders are welcome to suggest an alternative approach if they believe that it will deliver a financially sustainable business model for the future of the site.

Options Study

The relevant tasks are likely to include:

1. Consider current uses of the Ruins and other assets.
2. Consider potential uses and create a long list of potential activities/ uses which could meet a range of different outcomes:
 - Add to the visitor experience / create a year-round experience.
 - Increase dwell time and spend levels.
 - Broaden appeal and audiences.
 - Develop new and improved income streams.
 - Increase repeat visits.
 - Create a grounding/sense of connection with the surrounding community.
 - Match with the broader Cowdray Estate ethos of well-being and art inspiration.
3. High level assessment of the strengths and weaknesses for each option.
4. Supporting market assessment including tourism, competition, and demographic profile of the residential population living within specific drivetime contours of the Ruins.

Feasibility Analysis:

Assess the identified options to determine if achievable and realistic. Consider cost, potential benefits, heritage impact and technical feasibility. All potential heritage impacts will be tested against the existing conservation management plan (work to be undertaken by the already appointed Conservation Architect). This will result in a shortlist of options which are considered feasible and realistic. The following criteria (or similar) should be used to determine the likelihood of success:

- Physical possibility and impact on heritage significance (conservation architect/heritage consultant to advise).
- Statutory and planning constraints (conservation architect/heritage consultant to advise).
Environmental impact.
- Market fit.
- Indicative capital costs of the above (QS and other team members to provide this input).
Revenue generation / commercial viability and long term sustainability.
- Cross estate commercial enterprises.
- Added value potential e.g. education/training opportunities, well-being, volunteering, employment etc.

4.2 Consultation & Community Engagement

The successful consultant will be expected to support CHT's Operations Manager in testing proposals emerging from the Study with key stakeholders and potential new audiences from within our locality. CHT will reach out to and consult with groups that do not currently engage both through outreach visits and by creating special opportunities for these groups to visit the ruins. More information on this element can be found in the NLHF application which is available on request.

CHT is in the process of arranging an initial Covid-19 safe community engagement event aimed at a family audience at the end of October (Halloween). This may be delivered using a digital platform. For the purposes of the tender, please allow for up to two half day consultation sessions involving the public during the course of the works. This could include the production of simple display boards and presentations as required.

4.3 Experience & Qualities

Essential skills and experience:

- Previous experience of developing new revenue streams and uses for historic sites and/or visitor attractions.
- Previous experience of working on successful NLHF / HLF funded projects.
- Excellent track-record in developing projects involving heritage buildings and social outcomes.
- Personable and confident in communicating with a wide range of people and audiences, including stakeholders and funders.
- Flexible in approach and ability to be quick thinking and resourceful.
- Practical and proactive attitude.
- A willingness to work openly and collaboratively with the other consultants.

5.0 Management

The successful consultant/s will work closely with CHT's Operations Manager throughout the work. CHT's Project Steering Group (PSG) expects to be fully involved in the options identification process. Consultant/s should allow for at least 4 half day workshops with the PSG / Board of Trustees including presentation of the final reports and recommendations.

In terms of reporting, clarifications and programme the consultant/s will report to and be managed by CHT's external project manager (Lead Consultant). As noted in section 4, additional professional input will be made available to support the Study as required. Additional support will be coordinated and directed by CHT's project manager. It is anticipated that the successful bidder will work closely with the Lead Consultant, in a mutually supportive fashion.

6.0 Confidentiality

Please note that you may not during or after the course of the work disclose to any person or body any information of a confidential nature relating to the business or affairs of the Viscount Cowdray or his family.

7.0 Fees and timescales

A budget of circa £10,000 including all expenses, travel and disbursements but excluding VAT has been provisionally allocated for this work.

The contract for this work will run from October 2020 with a completion date of no later than the end of February 2021 for all final reports.

8.0 Tender requirements

Tenders should be submitted by email to Conservation Plus (Lead Consultant) by 5pm on the 12th October 2020.

Tenders should include:

- Names and organisation details for all members of the proposed consultancy team/s including: name; legal status (e.g. Sole Trader, Limited Company etc); head office address; address from which the work will be carried out; name and contact details for the tender (including telephone number and email address).
- Experience and skills of the individuals that will make-up the consultancy team undertaking the work (CVs of the consultancy team should be submitted as an appendix).
- Two case studies of similar work including contact details for references.
- A lump sum, fixed fee for the work; clearly state the number of days allowed for within the submission and the day rates for the various disciplines included. Please note that if the work takes additional days to complete then no additional fee will be payable unless the brief is changed significantly by the Employer or extra work is specifically at the request of the Employer.
- A detailed work plan (timetable) and methodology for undertaking the commission.
- All sums should be stated exclusive of VAT and confirm whether VAT will be chargeable.
- A copy of your Certificate of Professional Indemnity Insurance. The engagement is dependent on confirmation of this insurance being in place.

9.0 Contract Award Criteria

Tenders will be assessed against the criteria stated below:

Criteria	Weighting
Price	30%
Relevant experience and skills including Case Studies	35%
Detailed Work Plan & Methodology	35%

CHT reserves the right to interview selected candidates only following a desktop assessment. Interviews will take place on the 19th October 2020, from 14.00- 17.30 and will be held at the Cowdray Estate. No alternative date will be made available.

10.0 Clarifications and site visits

During the tender period, should the tenderer wish to present questions or seek clarification, requests will only be considered by email to the following address: jason.l@conservation-plus.org.

Site visits can be coordinated through the above contact. Access to site will be made available on the following dates & times:

Wednesday 30th September 09.00-14.00

Friday 2nd October 12.00-17.00

11.0 Submission of Tenders

Tenders should be submitted by email to jason.l@conservationplus.org Subject header: Tender Proposal – Cowdray Ruins

All tenders must be received by 5pm on the 12th October 2020. Late submissions will not be considered.