



THE WILLIAM SALT LIBRARY

STAFFORDSHIRE HISTORY CENTRE PROJECT

Staffordshire History Centre: Connecting people to collected stories and heritage of Staffordshire

Project Tender Specification Conservation Management Plan Nov 2016

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1. Introduction

Staffordshire Archives and Heritage (SAH) is working in partnership (lead partner) with the William Salt Library Trust (Registered Charity no. 528570) to deliver an exciting Heritage Lottery Funded Project (HLF).

The Staffordshire History Centre Project (SHC) will connect people to the collected stories and heritage of Staffordshire, Stoke on Trent, the Midlands and beyond. We will deliver a rejuvenated, accessible and sustainable Archives and Heritage Service by preserving collections and heritage buildings currently at risk and will develop new audiences for our heritage, both online and onsite. The transformed service will provide new opportunities to volunteer and engage with collections in different ways. We will achieve this by an Active Partnership with our committed stakeholders, where they are involved at the highest level in managing the service and making decisions. We will develop a major heritage attraction for Stafford and improve the public realm of the town, capitalising on recent changes that bring more people past our front door.

2. Background and Context

The aim of the Project is to create the Staffordshire History Centre and to:

- Develop our Active Partnership further to examine how we can work together on joint fundraising, income generation, support services, advisory panels, advice services and exhibitions.
- Preserve and repurpose the Grade II* listed William Salt Library (WSL) building in Stafford. Develop the ground floor of the townhouse as an integral part of SHC under a new lease. William Salt Library Trust (WSLT) will let upper floors as offices for start-ups, freelancers and the Cottage potentially as a residential letting.
- Improve storage of “at risk” collections. Extend archive storage at a redeveloped Staffordshire Record Office (SRO) to house collections from Lichfield Record Office (LRO) and WSL. Bring paper-based and digital Museum collections such as photographs, ephemera and oral history into SHC.
- Provide bright, welcoming, new spaces for activity by volunteers, schools and for audience engagement. Create exhibition areas, refreshment areas, a shop and browsing space for the service to provide an easy entry point for new users.
- Rejuvenate our online offer and deliver more services online.
- Capitalise on the significant changes and investment of £1 billion being made in Stafford Borough and town centre by creating a much needed new heritage asset to cater for the increased population.
- Create a new public route through the area which brings potential users directly past our new, open and welcoming front door.

Staffordshire Archives & Heritage (SAH) includes the Archive Service, jointly funded and managed by Staffordshire County Council (SCC) and Stoke on Trent City Council, and the County Museum Service funded and managed by SCC.

SAH is a respected, experienced and established organisation with a history of saving collections and innovation in access. It has developed this with the support of organisations including the Art Fund (Staffordshire Hoard, Minton Archive) and the HLF (Sutherland Papers, Staffordshire Appeals Project). SAH cares for around 11 million items across service points in Staffordshire and Stoke on Trent and online.

The main purpose of the SAH is to locate, collect and preserve archives relating to past and present life in Staffordshire and to make them available to the public. We manage three Record Offices (Stafford, Lichfield and Stoke on Trent), and a family and local history centre in Burton Library, and the County Museum.

The William Salt Library Trust was founded in 1872 to look after the collection of William Salt which focused on items about Staffordshire and its history. The object of the Charity is 'to advance the education of the public through the provision and maintenance for the purposes of study or research, of a collection of books, manuscripts, engravings, deeds, autographs and works of art relating in particular to the County of Staffordshire'. This collection is held in the WSL, Eastgate Street, Stafford immediately in front of Staffordshire Record Office (SRO).

SCC currently delivers the service and maintains the library building on behalf of WSLT.

We will create the Staffordshire History Centre (SHC) on the site currently occupied by the SRO and WSL. Key objectives are:

CAPITAL WORK:

- **Create new Atrium** link between the two buildings to provide a welcoming, dynamic and open space to encourage visitors into SHC.
 - Create a link from SRO to the WSL building through the space currently housing the WSL strongrooms.
 - Retain and restore the WSL building reinstating the original layout of the Cottage to become a standalone property potentially available for letting and refurbish upper floors to offer workspaces for rental.
 - Create a new walkway between North Walls and Eastgate Street improving movement of people around the town.
- **Create new PD5454 compliant strong-rooms** on the land behind SRO to house the collections transferred from LRO and WSL using passive design methods to reduce need for air conditioning. New strong rooms will provide 650m³ of storage and 25 years of expansion space for new collections. Provide new spaces for receipt of new collections, conservation, and digitisation adjacent to one another for efficient working.
- **Create new heritage offer for Stafford** which is undergoing major changes at present with £1 billion of investment planned in town centre and Stafford Borough. We will create a heritage attraction, walkway through the town and bring non-users right past SHC.
- **Create history access points** at Lichfield and Burton to replace LRO and revitalise the offer in both Libraries.

ACTIVITY WORK

- **Create new onsite visitor offer** using the Atrium at SHC which will be the first point of engagement, discovery and exploration for new and existing users. Deliver exhibitions, audio/video booths, which will showcase collections.
- **Provide technology** such as a touchscreens to explore documents in detail, computers to access all our newly-digitised collections.
- **Deliver a learning programme** of a wide range of learning activities to schools, colleges and universities including school visits to SHC and in-school sessions for primary schools
- **Develop an exhibitions programme** offering 3-4 exhibitions per year at SHC and additional touring exhibitions to community venues.
- **Digitisation programme** to deliver digital access from our new digitisation suite.
- **Volunteer programme** to support collection care, preservation, cataloguing, researching exhibitions and providing family history advice.
- **Community engagement** to engage with local groups and communities, develop new access points, target areas of low engagement, develop programmes with health and wellbeing sector. Provide a series of events and support programmes by staff and volunteers.
- **Increase access to collections** by a programme of cataloguing involving volunteers, new catalogue front end. Linking to exhibition, learning, and digitisation.
- **Build resilience** by restructuring resources to move away from multiple searchroom facilities to a concentrated facility. Become more outward focused and engage with more and new users.
- **Develop an Active Partnership** approach to jointly manage and deliver the SHC, explore alternative governance arrangements and build sustainability.

The total estimated project costs are £5.7m with a grant request from HLF for £4.3m. In addition there is £ 1.8m matched funding from the project partners, in-kind contributions and fundraising. For the development phase our budget totals £462,200 with confirmed development grant allocation from HLF of £333,400.

3. Work Specification and Summary of Outputs

The Staffordshire History Centre project enables the partnership to transform the way the service currently operates and significantly improves the storage conditions for the WSL and LRO collections and the viability of the WSL building, while changing public perceptions of SSoTAS and WSL as only being accessible for certain groups of researchers.

To realise project vision we need a detailed Conservation Management Plan to cover the whole site and collections within the project. This plan should link to the Activity Plan, Interpretation Plan and the Management and Maintenance Plan.

The plan should set out the significance of the heritage assets and how they will be retained and used within the Staffordshire History Centre. It should include the setting as well as the collections and buildings to deliver a holistic examination of the whole site. The brief also includes the development of a Heritage Impact Assessment as a separate but related piece of work.

Two consultants are required to develop both the Conservation Management Plan for the buildings and the collections. The consultants must work with each other and with the professional staff to ensure the collections conservation plan and buildings conservation plan complement one another.

Current buildings and collections

The William Salt Library building comprises a Grade II* listed Georgian townhouse and attached Victorian cottage. It is situated on Eastgate Street alongside other period buildings of a similar date and is in a Conservation Area. The William Salt Library was established in 1872. This building has been the location for the Library since 1918 and belongs to the William Salt Library Trust. The building has been leased to Staffordshire County Council since 1994 and the Council is currently responsible for the building maintenance and management of the Library. The collection is a mixture of rare books, modern publications, pamphlets, newspapers, manuscripts, archives, portraits, watercolours, drawings and photographs related to Staffordshire. The oldest item dates from the Anglo Saxon period and includes contemporary publications about the county.

Staffordshire Record Office is situated immediately behind the William Salt Library in a purpose built building dating from 1960. It is owned, maintained and managed by Staffordshire County Council. The building has been extended several times most recently in 2003. The collections include archives from the County Council and other local authorities, courts, businesses, charities, family and landed estates, churches, private individuals. They date from the Anglo Saxon period to present day.

Lichfield Record Office is located in the Friary with Lichfield Library. The record office has been based there since 1989 with purpose built strongrooms and rooms converted for the search room and offices. During the project the Lichfield collections will be relocated to the new History Centre and a History Access Point created within Lichfield Library. The Library is also going to move to a new location in 2018 funded by Staffordshire County Council. The main collection is that of the Diocese of Lichfield which dates back to the medieval period and covers Staffordshire, Derbyshire, N Shropshire and NE Warwickshire. In addition the record office holds collections for the city of Lichfield, the Cathedral and surrounding areas.

The County Museum is currently located at Shugborough Estate with a museum in the Servants Quarters and storage facilities on site. The Estate is returning to the National Trust in November 2016 which will mean that the museum storage areas will be relocated. The new storage facility is not being funded by HLF. A significant number of items will remain on loan to the National Trust in the Servants Quarters. The museum has important social history, agricultural, costume, transport, domestic life, fine and decorative art, photograph and oral history collections relating to Staffordshire.

All of the collections above will be used and interpreted through this project either in exhibitions at the Staffordshire History Centre, touring exhibitions across the county or digitisation providing remote access.

Existing documentation

A Building Condition Survey on the WSL was carried out by a conservation architect in 2015, which includes plans, photographs, structural report, electrical report and a detailed report on the building including a maintenance plan.

Collection Policies exist for all three collections which will be stored or exhibited in the Staffordshire History Centre. The Archive Service collections are designated by Arts Council England and the application includes statements of significance for the collection.

Access to archives, maps and publications in the William Salt Library and Staffordshire Record Office will be provided with direction and advice from staff.

The County Council Historic Environment team can also provide access to the Historic Environment Record (HER), Stafford Extensive Urban Survey, and results of a recent cellar survey for Stafford.

Conservation officers from Stafford Borough Council and Historic England have been involved in the development of the project and advised on the production of the feasibility study.

Brief for buildings element of Conservation Management Plan

The consultant(s) will:

- Carry out sufficient historic research to establish the history of the historic asset(s) and their individual and collective significance.
- Work with the Design team and the SHC Project Team to produce a detailed Conservation Management Plan for the SHC and WSL building focussing on the historic building and collections. The Plan should conform to HLF's guidance *Conservation Plan Guidance (2012)* <https://www.hlf.org.uk/conservation-plan-guidance>.
- Liaise with the local Conservation Officer and Historic England Officer to maintain their involvement with the project and recommendations on appropriate use of the listed building.
- Liaise with the Staffordshire Historic Environment team. Produce a *Historic Environment Desk-Based Assessment* (HEDBA). This will inform the need for any further evaluations or site investigations.
- Work with the consultant appointed to deliver the Activity Plan to ensure that the activities identified will be appropriate and not put the collections at risk. Ensure that the consultation with groups who currently and potentially could use these collections feeds into the Conservation Plan. Identify the current risks to the WSL building and the collections and how they should be protected and preserved in the proposed new build. Identify opportunities to

improve management of the collections and enable access for a wider audience.

- Referring to the Building Condition Survey, write an outline history and context for the building and statements of significance. This should link to the existing collections statements.
- Agree a plan for conserving the building and managing issues and vulnerability in the future.
- Work with the Project Team to assist with the development of the design of the new build element and the refurbishment, and ensuring the appropriateness and viability of the WSL building in conservation terms.
- Work with the consultant producing the collections part of the Conservation Plan.
- Identify relevant training needs for the Training and Development Plan.

Brief for collections element of Conservation Management Plan

A consultant is required to work with the Archives and Heritage service professional staff to write the collections element of the Conservation Management Plan. The professional team will include Joanna Terry (Head of Archives & Heritage) supported by Tim Groom (Senior Archivist), Chris Copp (Senior Museum Officer), and Richard Nichols (Senior Conservator).

The consultant will:

- Assess current policies, procedures governing the current management of the collections in their existing sites. This will include reference to the Collections Policies and Preservation and Conservation Policies for the Service.
- Describe the current storage locations and conditions for the Archive, Museum and William Salt Library collections.
- Work with the consultant producing the buildings element of the Conservation Management Plan.
- Work with the Interpretation design consultants to develop ideas for the exhibition area, interactive and digital elements (as appropriate) and advise on access in with the History Centre.
- Work with the Interpretation Designers to feed the significant elements of the collection and buildings into the stories to be told and the choices made for display and explanation.
- Contribute to consultation and planning for the Management and Maintenance Plan and the Activity Plan for the project.
- Identify relevant training needs for the Training and Development Plan.

Timescales

To inform the design development the Conservation Management Plan should be completed by the end of June 2017. The estimated milestones for the development of Conservation Management Plan are:

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| • Project initiation | January/February 2017 |
| • First draft | March/April 2017 |
| • Second Draft | May 2017 |

- Engagement with design team June 2017
- Complete work June 2017
- Section for Round 2 application September 2017

We are aiming to submit our Round 2 application in February 2018.

Budget

Up to £19,000 has been allowed for the buildings element of this commission and £4,000 for the collections element with support from professional staff.

The maximum budget for Conservation Management Plan production (buildings and collections) is £23,000 including all expenses such as travel costs, venue hire and facilitation costs and all other expenses. Your application will be assessed on competitive price and value for money.

The partners will endeavour to provide low cost or free meeting and workshop venues.

Payment will be made on receipt of invoices. The contracted party/parties will be responsible for paying their own tax and NI.

The full terms and conditions of the consultant's appointment will be in accordance with Staffordshire County Council's standard procurement procedures [attached].

Please note that, while not the only criteria, value for money is a key element of our evaluation criteria. You should provide an informed estimate of the cost of the proposed procurement. Submit all prices in pounds sterling and indicate VAT separately, if applicable. Quoted prices will be fixed and firm for the duration of the contract.

4. Project Partners and Management of Commission

Staffordshire and Stoke on Trent Archive Service
Staffordshire Record Office, Eastgate Street, Stafford, ST16 2LZ
Key Contact: Project Executive - Joanna Terry, Head of Archives & Heritage

Strategic Property Service, 2 Staffordshire Place, Tipping Street, ST16 2DH
Key Contact: Tina Nixon, Project Manager – Capital Programme

William Salt Library Trust
William Salt Library, Eastgate Street, Stafford, ST16 2LZ
Key Contact: Mithra Tonking, Chairman of the Trust

The commission will be managed by Matt Sutton, SCC Procurement Category Manager, main contact for procurement process.

5. Process for submitting proposals

Tender response requirements

In responding to this tender, please include:

- Details of how you propose to meet all of our requirements and outputs listed above
- Your proposed project methodology
- Detailed project plan
- Clear and detailed budget for the project, including daily rates of staff employed
- Previous experience of providing similar services
- Detailed CV's for any staff members proposed with your tender
- Quality assurances procedures
- Skills and experience in:
 - Production of Conservation and Management Plans for HLF funded projects
 - Working with archives or other heritage organisations
 - Engagement with commissioning organisations staff and stakeholders
 - Imaginative/innovative approach but based in practicality

Evaluation Criteria

Selection of the successful consultant will be carried out by assessment of their proposal followed up by the interview. All submissions will be measured against criteria listed below:

Criteria		Weighting
Value for money	Competitive price and ability to deliver value for money	30%
Quality	Evidence of successful project delivery in required field, ability to deliver on time and to high quality. Experience suited to the project and proposed methodology	30%
Experience	Understanding of the archive sector, the project and its key deliverables, evidence of experience that is relevant to the listed requirements, comprehensive and relevant approach to the brief, implementation and capacity.	30%
Experience	Clarity of writing, including strength of narrative and avoidance of unnecessary jargon. Experience and track record delivering similar projects	10%

All correspondence in relation to this tender, including tender submissions, should be made via the County Council e-tendering portal.

Tender Timetable

Please see below a detailed timetable of when specific events will take place and specific deadlines which must be met in order to participate in this tender.

Event	Date/Time
Tender Notice posted	w/c 21 November 2016
Tender response deadline	16 December 2016
Interviews (if applicable)	10 January 2017
Anticipated contract award	End of January 2017

Terms and conditions

The full terms and conditions of the consultant's appointment will be in accordance with Staffordshire shire County Council's standard procurement procedures [attached].

Compliance

We reserve the right to disqualify or reduce the evaluation score of any tenderers who do not fully comply with the requirements in the tender documentation, in particular the closing time and date. We reserve the right to evaluate proposals on a variety of criteria. The tender with the lowest price will not automatically be accepted.

Tendering

If we need to amend any tender documents before the closing date, we will write to you with any changes. If we extend the deadline for tender responses, we will advise you.

SCC is not responsible, and will not pay for any expenses or losses you incur during, but not limited to, the tender preparation, site visits, post-tender negotiations or interviews.

Information and questions

If you need us to clarify the documentation or if you have further questions regarding the tender process, please contact us via the e-tender portal. We will respond to reasonable requests for further information within the timescale of the tender.

Return of Tender

All documents should be returned via the e-tender portal.

Post-tender interviews

SCC reserves the right to ask you to attend post-tender interviews or present your proposals. You are responsible for all your expenses when attending such interviews. If required, interviews will take place on 10 January 2017 at Staffordshire Place 1, Stafford, ST16 2LP. SCC reserves the right to conduct post-tender negotiations with one or more tenderers.