



THE SAINT AELRED'S PILGRIM TRAIL SOCIETY.

'Saint Michael's Lodge: A Sustainable Future for an Historic Church – Data Gathering.' **Phase 1 Heritage Project Tender Brief: Project Management consultancy.**



Estimated duration:

October 2026 – October 2027

Introduction and background.

Following the successful award of a grant from The National Lottery Heritage Fund, The Saint Aelred's Pilgrim Trail Society CIO is seeking Project Management consultancy support for the first phase of an exciting and ambitious project to re-purpose the closed church of Saint Michael, Cold Kirby, in the North York Moors National Park.

Saint Michael's Church, Cold Kirby has been a spiritual landmark since Saxon times and is mentioned in the Domesday book. The majority of the church seen today was built in the 1840's with periodic additions thereafter - notably the south porch in 1920 which serves as the parish war memorial. The church building is of no particular architectural style and is straightforward in layout; it consists of a nave, chancel, a west tower with belfry and a south porch.

In 2024, following a period of public consultation, Saint Michael's was formally closed for public worship and the building has been put up for sale by the Diocese of York and the Church Commissioners.

The Saint Aelred's Pilgrim Trail Society CIO is a charity that developed and now promotes The Saint Aelred's Pilgrim Trail, a multi-modal network connecting nine historic churches and Rievaulx Abbey in the North York Moors.

(www.saintaelredspilgrimtrail.com). The Trail includes distinct walking, horse-riding and cycling routes and aims to connect people with the area's heritage, landscape, communities and the story of Saint Aelred of Rievaulx. The charity has registered an

interest with the Diocese of York and the Church Commissioners to acquire the building, restore and retain its heritage features and then to re-purpose the building (the 'preferred option') into low cost overnight accommodation for walkers, cyclists and visitors to the North York Moors National Park.

Vision and outcomes.

This project, 'Saint Michael's Lodge: A sustainable Future for an Historic Church, - Data Gathering' is the first phase of an intended two phase project which will ultimately see St Michael's Church, Cold Kirby, repurposed into low cost overnight accommodation for all types of visitor to the North York Moors National Park, the Saint Aelred's Pilgrim Trail and the Cleveland Way. This first phase is being funded by The National Lottery Heritage Fund.

This phase 1 project is a 'data-gathering' project designed so that the Trustees of The Saint Aelred's Pilgrim Trail Society will have all of the information and costings to enable them to evaluate whether a subsequent (phase 2) project to purchase and undertake all of the capital works required to re-purpose Saint Michael's according to the 'preferred option' is feasible and economically sustainable. The phase 1 project will deliver all of the surveys, audits and studies to prepare for a possible future chapter for Saint Michael's Church.

Currently, there is no low cost accommodation for visitors in this area of the North York Moors National Park, so not only will this project restore the heritage features of this Grade II listed building, including its ancient bells and 12th century font, it will also repurpose the building to allow more visitors to stay in the National Park, enjoy its wonderful landscape and learn of its rich architectural, landscape and lived heritage.

Saint Michael's Church was closed to public worship in 2024 and the building has been unused for the past 2 years. Prior to its closure the 5-yearly survey of the building carried out in July 2021 under the Churches Inspection Measure 1991, and delivered to the PCC in the autumn of the same year, highlighted a number of condition issues with the building including the roof and ceiling timbers. It was the results of this report together with an assessment of the likely costs of repair that caused the local community to arrive at the painful decision that it could not afford

the sums of money indicated. If the building is to have a future it will need to be repurposed.

The phase 1 funding from The National Lottery Heritage Fund will enable the Society to develop its plans and undertake the specialist work needed to explore how Saint Michael's can be conserved and adapted for its proposed new use. The funding will help the project investigate its conservation, design, access, planning, environmental, business and operational requirements and prepare its proposals for a phase 2 capital grant application.

Scope of Work: Role of the Project Manager.

The Project Manager will report to The Reverend Ian Robinson, Project Director, on behalf of the Trustees. The Project Manager will lead the project team in the implementation, completion and documentation of the 24 separate tasks, studies and evaluations which form the phase 1 'data-gathering' project. (There are 25 tasks in the project plan attached as an appendix to this document but task number 3 is the appointment of this post – Project Manager). The project team will be a sub group of the Trustees of The Saint Aelred's Pilgrim Trail Society CIO, supplemented by coopted volunteers who have relevant specialist skills to help the Trustees in this work.

Tasks to be undertaken

- Maintain the development programme, budget, risk register, action plan and decision log.
- Prepare clear progress reports and recommendations for the Project Director and Trustees. Each progress report should contain a section where the Project Manager gives their assessment of the overall viability of the preferred option for the repurposing of Saint Michael's based on the evidence gathered, including escalating any findings which could materially affect the scope, cost or viability of a future phase 2 project.
- Maintain effective communication with the National Lottery Heritage Fund Investment Manager and relevant Heritage Fund colleagues.
- Commission, brief, coordinate and monitor specialist consultants, including where required conservation, architectural/design, planning, access, environmental, cost, legal and business-planning expertise.

- Manage consultants and, as appropriate during the development phase, contractors; monitor performance, deliverables, costs and programme, and address emerging problems promptly.
- Oversee and direct as appropriate the 3rd party consultant chosen to coordinate a full consultation with Cold Kirby residents and other interested parties on the 'preferred use' of Saint Michael's Church, ensuring that views are recorded, considered and appropriately reflected in developing proposals.
- Coordinate the development of a robust, realistic and sustainable model for the proposed Lodge, including operational, access, visitor, safeguarding and organisational considerations as required.
- Ensure that heritage, environmental, ecclesiastical, planning and accessibility considerations are identified and properly progressed.
- Prepare and coordinate material required for the next stage (phase 2) of funding and approvals.
- Ensure that records, evidence, decisions, expenditure and project documentation are maintained to a professional standard.
- Identify and escalate significant risks, conflicts, delays, cost pressures or changes in scope to the Project Director and Trustees.
- Work collaboratively with SAPT volunteers, church representatives, professional advisers, local organisations and other stakeholders.

Expected outputs

- Production of all documents required to satisfy the terms of The National Lottery Heritage Fund grant.
- Regular update reports / minutes to keep Trustees apprised of the current status of the project, any identified risks or issues and budget updates.

Tender submission requirements.

Interested parties are requested to submit a tender proposal comprising 7 sections:

1. CV(s) and company/individual profiles of the person overseeing the work and those who will actually conduct the work. The CV should outline key personal skills and areas of expertise.
2. Evidence of having previously worked on a similar/substantially similar project.

3. An understanding of the brief and a detailed proposed methodology of work. Tenderers are especially asked to demonstrate how they would manage the dependencies between the different tasks/workstreams in the project plan. Some of the early surveys will inform later aspects of the phase 1 project and ultimately define the case for a potential phase 2 project; tenderers should show how they will coordinate this aspect rather than considering each task/workstream in isolation.
4. A clear programme of work aligned with the project timetable (see appendix). It is anticipated that there will be between 40 and 50 days of project management input over the 13 month phase 1 project period (see following section on Timing and Fees). Tenderers should demonstrate how they would allocate their time across the programme so as to manage the busier periods of the project within this allowance.
5. A detailed Fee proposal, showing day rates, anticipated days, and expenses. The fee proposal must make clear the overall total cost of the work (including VAT where applicable)
6. Contact details for two references for similar work you have previously undertaken.
7. Confirmation of availability for interview dates.

Timings and Fees.

The 'Saint Michael's Lodge: A sustainable Future for an Historic Church, - Data Gathering' phase 1 project has a duration of 13 months, beginning no later than 1 October 2026 and ending on 31 October 2027. This project is mainly one of sourcing and overseeing other professionals to ensure that the 24 tasks in the project plan (see appendix) are completed in full, on time and within budget. It is expected that a consultant would work between 3 and 4 days per month on average on this phase 1 project (i.e., 40 to 50 days across the 13 month project period).

The daily consultancy fee you propose should be detailed as per item 5 in the section above on Tender submission requirements. The budget allocated for this contract is £20,000 + VAT.

Tender Process, information and timeline.

The Saint Aelred's Pilgrim Trail Society CIO is committed to achieving best value outcomes so that the public money donated via The National Lottery and granted to

the charity by The National Lottery Heritage Fund is spent to its maximum potential and benefit. An appointment to this role will therefore be made on the basis of best value, taking into account the degree of understanding of the issues demonstrated by the tenderer, the appropriateness of the proposed methodology and methods, the degree of experience to complete the work to the highest standards and to the agreed timetable and the detail and clarity and sum of the total cost proposed by those applying. The Saint Aelred's Pilgrim Trail Society CIO (Charity No. 1214879) will be the contracting authority and it reserves the right to make an appointment on the basis of tenders submitted without the need for an interview.

Invitation to Tender issued:	Tuesday 1 st September 2026
Deadline for clarification questions:	Tuesday 8 th September 2026
Closing date for tenders:	Tuesday 15 th September 2026
Consideration of tender submissions:	16 th – 18 th September 2026
Interviews (if required):	Tuesday 22 nd September 2026
Appointment of consultants:	Friday 25 th September 2026
Project start date:	1 st October 2026
Project end date:	31 st October 2027

Clarifications during the tender preparation period.

Should tenderers require answers to queries they wish to raise during the tender period, these should be submitted to iancrobinson009@gmail.com The deadline for submitting clarification queries is Tuesday 8th September 2026.

Submission of tender.

Completed tender proposals should be sent by email to the Reverend Ian Robinson at iancrobinson009@gmail.com Please include in the email heading 'Project Management Tender – St Michael's Lodge.' Tender applications timed as being received after midnight on Tuesday 15th September 2026 will not be considered.

Review of applications and shortlisting.

A panel of Trustees from The Saint Aelred's Pilgrim Trail Society CIO will review all applications submitted by the deadline and shortlist up to three for interview. If, in the opinion of the panel, having judged the applications according to the criteria below, there is nothing to be gained by holding an interview process, then the

Trustees may proceed to appoint the preferred tenderer on the basis of tender documentation only. If interviews are required these will be held on Tuesday 22nd September 2026 and tenderers should confirm in their tender documentation that they would be available for interview on this date if required.

Criteria for the selection of a preferred consultant.

The principal criteria and weightings which will be used in the selection of the Project Management Consultant are as follows:

Criterion	Evidence sought	Weight
1. Complex project management and control	Programme, budget, risk, reporting, procurement and delivery against agreed objectives.	25%
2. Managing consultants and contractors	Commissioning, briefing, coordination, performance, scope, cost, quality and programme; resolving problems.	25%
3. Heritage Fund / comparable funder experience	Grant conditions, monitoring, reporting, evidence and funder relationships.	20%
4. Heritage / listed-building experience	Development, conservation, adaptation or management of historic/listed buildings.	10%
5. Strategic development and funding	Turning an emerging vision into a viable, researched, costed and fundable project.	10%
6. Communication, relationship-building and understanding of the SAPT context	Clear written and verbal communication with professional, and voluntary audiences. Pilgrimage, walking, cycling, horse riding, rural tourism, heritage and the Trail's wider purpose.	10%

Tenderers should expect to be excluded if they cannot provide demonstrable evidence against any one of the first 3 of these 6 criteria.

The application and interview panel will assess tenderers responses according to the 6 criteria in the previous table and will award points up to the maximum shown against each criterion using the Assessment Scoring Criteria table below. Failure to achieve a rating of satisfactory (i.e., a minimum unweighted score of 3 or above) against any one criterion may result in the application being rejected.

Assessment scoring criteria.

Score	Definition
5 – Exceptional	Extensive, highly relevant evidence; experience clearly exceeds the requirement.
4 – Strong	Good, directly relevant evidence demonstrating a high level of competence.

3 – Satisfactory	Meets the requirement with credible and relevant evidence.
2 – Limited	Some relevant experience, but significant gaps or limited evidence.
1 – Unsatisfactory	Little or no relevant evidence; requirement not demonstrated.

Confidentiality.

All information provided by tenderers as part of a tender return will be treated as confidential. It will not be disclosed to any third parties with the exception of The National Lottery Heritage Fund who may request access to the documentation as part of their requirements to ensure that The Saint Aelred's Pilgrim Society CIO have complied fully with the terms of the phase 1 grant awarded to it.

**Saint Michael's Lodge: A sustainable Future for an Historic Church,
- Data Gathering' Phase 1 – Project Plan.**

When will the task happen?	Task Number	What is the task?
Give us the estimated dates you expect to start and end each task. List tasks in chronological order.	Referred to in the Project submission document	Tell us about the tasks you will carry out during your project. Provide detailed information about the things you told us you would do as part of your project in your application. This could include any events you will hold, activities you will offer or things you will create.
Start 01/10/26 End 31/12/26	1	Develop a recommended long-term vision, organisational model, and sustainability pathway for the Saint Aelred's Pilgrim Trail Society to 2035 and beyond, identifying the structures, partnerships, resources, and capabilities required to achieve it's vision. To undertake an independent review of the Society's long-term sustainability and viability and to produce practical recommendations for strengthening governance, organisational capacity, financial resilience and charitable impact. A set of proposals to be made and implemented to ensure that: (a) The charity has all of the skill sets required to control and deliver a major capital project and put in place a sustainable economic business to maintain and develop the building in the long term. (b) Where there are gaps in skill sets, to either bring in new Trustees with those skills and/or find external parties who can be co-opted during the project and/or provide training to plug those gaps. (c) More broadly, to develop pathways to work effectively with key partners and stakeholders in the project and to sustain these relationships over the long term. (d) The charity has a plan for Trustee and key partner succession.
Start 01/10/26 End 31/12/26	2	Document and audit the Governance Structure of The Saint Aelred's Pilgrim Trail Society CIO. The Saint Aelred's Pilgrim Trail Society CIO as a new charity, needs to evidence that it operates as a charitable body in a way which is open, transparent, inclusive and always in accordance with charity law and the highest levels of probity. Methods of working statements, policy documents and the documenting of how decisions are discussed, analysed, voted and decided on - need to be recorded, along with generating policy documents on procurement, tendering and other issues relevant to running a high value capital project in the future.
Start 01/10/26 End 31/10/27	3	Appoint a Professional Project Manager to run this project. Whilst the charity has many skill sets, it would be prudent in this project to employ a professional who can coordinate and bring together this initial 'small project application.' Day to day engagement with professional 3rd parties who might help with the tasks which follow below can be done by Trustees but it would be helpful to have a professional who is also knowledgeable of the small grants application process to guide us at a strategic level to bring this project together as quickly as possible.
Start 01/11/26 End 31/10/27	4	Project Evaluation. Evaluation of this small grant project by an external consultant.

Start 01/11/26 End 31/01/27	5	Undertake an options appraisal. A piece of work designed to show the various options that have been considered for the future use of St Michael's Cold Kirby. This will include the strengths and weaknesses of each option, economic analysis and need of each option and evidence of consultation with and feedback from the local community and other interested parties about their preferred use of the building.
Start 01/11/26 End 31/01/27	6	Commission a Structural Survey - Building. A full structural survey of St Michael's Church, Cold Kirby as it currently stands. The church was last surveyed in July 2021 as part of the Quinquennial Inspection (QI) regime of the Church of England. A QI inspection is generally only conducted 'from the ground' and it is important to have a full inspection including the roof and tower (including the tower structures which support the bell housings and mechanisms) to understand the extent of any conservation repairs that would be necessary simply to make the building watertight, the stonework fully and properly pointed and the window apertures and glass securely set. In 2021 the QI report estimated that the church needed c£80,000 of conservation works which would need to be carried out within 10-15 years from the date of that report (2021 prices). This report needs updating by a new, independent and full structural survey not only to gain a full picture and cost of the current structure but also to inform an understanding of the current value of the closed Church, which the Diocese of York and Church Commissioners are marketing at an asking price of £40,000
Start 01/11/26 End 31/01/27	7	Commission a Condition Survey - Building. A full condition study of St Michael's Church, Cold Kirby as it currently stands. The church was last surveyed in July 2021 as part of the Quinquennial Inspection (QI) regime of the Church of England. A QI inspection is generally only conducted 'from the ground' and it is important to have a full inspection including the roof and tower (including the tower structures which support the bell housings and mechanisms) to understand the extent of any conservation repairs that would be necessary simply to make the building watertight, the stonework fully and properly pointed and the window apertures and glass securely set. In 2021 the QI report estimated that the church needed c£80,000 of conservation works which would need to be carried out within 10-15 years from the date of that report (2021 prices). This report needs updating by a new, independent and full structural survey not only to gain a full picture and cost of the current structure but also to inform an understanding of the current value of the closed Church, which the Diocese of York and Church Commissioners are marketing at an asking price of £40,000
Start 01/11/26 End 31/01/27	8	Commission a Condition Survey - Bells. St Michael's houses 2 bells of historic interest, one from the late 13th century and one from the 17th century. The 13th century bell is listed by the Council for the Care of Churches as being worthy of preservation. The last survey of the bells, mechanisms and supporting structures was in 2016 when it was reported that many of the structures were seized and that the bells needed a full programme of restoration and rehanging to put them back into safe use. A full condition report on the bells and associated structures is required from a bell-founder or bell-hanger who works in accordance with the code of practice.
Start 01/11/26 End 31/01/27	9	Commission a Condition Survey - Roof and Tower Timbers. The 2021 QI report detailed some issues with roof joists and timbers in the tower. Whilst a structural view of the timbers might be taken in the Building Condition Survey (above), it would be prudent to have a survey of the timbers to check for infestation, water, rot and beetle etc.

Start 01/11/26 End 31/01/27	10	Commission an Archaeology Survey. Whilst the current building was erected in 1841 there has been a church on this site since the 12th century. An archaeology survey will be required to assess any 'archaeology of note' that will need to be considered in any future development of the building. It will be important to have archaeology properly mapped and located as other than electricity there are no other utilities currently installed at St Michael's. As a minimum, water and sewerage will need to be installed as part of any future project works.
Start 01/11/26 End 31/01/27	11	Commission an Ecology Survey. The closed church building currently being marketed by the Diocese/Church Commissioners, is surrounded by a churchyard. The sale particulars indicate that the churchyard to the north side of St Michael's is proposed to be included in the sale but it would be prudent to have an ecology survey of an area around the whole church building as access for any building works in the main project and ongoing maintenance thereafter will require an ability to operate from all sides of the building. This land slopes away quite heavily to the north side and east end of the church building and it was noted in the 2021 QI that "the eastern area of the Churchyard has been allowed to naturalise."
Start 01/11/26 End 31/01/27	12	Commission a Measured Building Survey.
Start 01/11/26 End 31/01/27	13	Commission a Topographic Survey.
Start 01/11/26 End 31/01/27	14	Commission a green energy options report. Given that significant work is likely to be required to the roof, it would be both prudent and desirable to assess to what extent green energy solutions for heating, lighting and water could be built into the final project. A piece of work is needed to outline the possibilities, propose the most workable solutions and to evaluate the cost of their implementation.
Start 01/11/26 End 31/01/27	15	Electrical systems survey
Start 01/11/26 End 31/01/27	16	Drainage and Water Supply Survey.
Start 01/11/26 End 31/01/27	17	Access to property survey.

Start 01/02/27 End 28/02/27	18	RICS independent valuation of Saint Michael's. RICS valuation of the church building in it's current condition prior to any re-purposing project.
Start 01/02/27 End 31/05/27	19	Architectural design and specification to RIBA stage 3. A piece of work aimed at formulating a coherent design for the whole building which meets the objectives of: (a) providing a minimum of 12 bed spaces across a minimum of 4 separate rooms; (b) including at least 1 fully accessible room with its own washing facilities; (c) separate female and male washing and toilet facilities; (d) a small kitchen area; (e) a social seating area; (f) a utilities cupboard and (g) a small boot/drying room. This piece of work will assume that the building is in sound condition following any works identified in the Building, Bells and Timber condition surveys above.
Start 01/02/27 End 31/05/27	20	Planning Consultation. Share and discuss the proposed design and future use of St Michael's with the planning authority, working with their officers to ensure that the design meets the planning requirements of development within the National Park and modifying/seeking alternative solutions where these are suggested. Discussions also to include proposed green energy solutions and other environmental, archaeological and ecological issues identified in each of the above surveys.
Start 01/06/27 End 30/06/27	21	RICS independent valuation of Saint Michael's. RICS valuation of the church building in its <u>proposed</u> form, in good condition and taking into account the final architectural design and specification.
Start 01/06/27 End 31/07/27	22	Vendor Consultation. Once the design and specification stage and planning stages are completed - share the proposals with the vendors of the building who will be the Church Commissioners. Aim is to get an outline approval or approval in principle from them - always subject of course to their own statutory consultation procedures.
Start 01/06/27 End 31/08/27	23	Full Cost Plan. A fully worked up Quantity Surveyor cost plan for the whole St Michael's lodge project based on the Architectural design and specification proposal above.
Start 01/06/27 End 30/09/27	24	Operational Business Plan Feasibility Study. A full business plan which provides the economic stability to look after and maintain the heritage asset in its repurposed form in accordance with the preferred option for development and the associated design, specification and cost plan. The business plan to demonstrate clear and transparent underlying assumptions which are supported by independent and relevant data for similar projects. Key assumptions to be 'stress tested' to provide an indication of 'headroom' for each key assumption. The Operational Business plan will demonstrate that the heritage asset can be looked after, repaired and be responsibly maintained through a sustainable business model for the long term.
Start 01/09/27 End 30/09/27	25	Conservation Deficit Calculation. Fully updated Conservation Deficit Calculation utilising all of the information gained from this project - in preparation for an EOI of the proposed repurposing project for St Michael's Cold Kirby with all necessary supporting documentation.

End