



THE JOHN RAE SOCIETY FIT FOR THE FUTURE

BRIEF FOR ORAL HISTORY PILOT

1. INTRODUCTION

The John Rae Society is looking to appoint a suitably qualified consultant or team to undertake an oral history pilot and to scope and prepare a brief for a larger exercise aimed at capturing local stories, memories and family histories associated with the Hall of Clestrain and the Hudson's Bay Company (HBC) in Orkney.

This is part of a National Heritage Lottery Fund (NLHF) supported project that aims to build the resilience and capacity of the Society to care for this internationally significant heritage and to better understand and scope the unique stories that can be explored, particularly those relating to the hundreds of Orcadians employed by the HBC throughout the 18-19th centuries, and to cultural exchanges between Orkney and Canada's First Nations, Métis and Inuit people.

2. BACKGROUND

The John Rae Society (www.johnraesociety.com) was established as a Scottish Charitable Incorporated Organisation (SCIO) in 2013, Registered Charity Number SCO44463. Its purposes are:

- To advance the education of the public in the life and achievements of John Rae as the discoverer of the final navigable link of the Northwest Passage and one of the greatest arctic explorers
- To advance the arts, heritage, culture and science by promoting the life and achievements of John Rae to foster friendship and understanding between members of the public, the people of Orkney, and those in Canada, particularly, but not exclusively, those areas associated with John Rae, through a broad range of activities
- To conserve, restore, augment and sustainably develop the Hall of Clestrain as a building of historic and architectural significance; as a celebration of the birthplace of John Rae; and as a significant visitor, information and study centre for tourists and local people alike, relating to the Arctic then, now and in the future
- To provide new facilities that respect the character of the listed historic buildings; to support sustainable activities and enable economic growth providing real community benefit, by creating education, training and volunteering opportunities particularly for

young people and unemployed people locally; to provide and maintain recreational facilities and public amenities in the restored buildings, available to local community and visiting groups

- To promote engagement with local communities, businesses and academic institutions; to enable the new facility to act as a focal point for collaboration; and to increase awareness and understanding and learning particularly, but not exclusively, relating to the Arctic.

Its constitution identifies that The John Rae Society (JRS) has the 'power to do anything which is calculated to further its purposes or is conducive or incidental to doing so'.

JRS has a dynamic and successful track record. In 2016, following a successful fundraising campaign, the Society purchased the Hall, subsequently installing a temporary visitor centre, employing a part-time Project Officer, holding numerous events and activities and undertaking outreach with schools.

Between 2020-21, JRS worked with a conservation accredited architect and a business consultant to devise a capital development scheme for the Hall. This large-scale development involved preserving the Hall, reconstructing and re-using the East and West pavilions and creating a new build Arctic Centre to the north façade of the Hall.

Despite early funding success, JRS was unable to secure match funding. This position and the significantly changed heritage and funding environment post Covid-19, led the Society to reflect on its plans. In 2023, the Society made the decision to progress its purposes through two smaller discrete projects, each better able to obtain funding to secure the long-term preservation of this highly significant building:

- **Project 1: Save the Hall of Clestrain (2024-25/6 – short-term)**
An urgent repair project to make the building wind and watertight and enable it to dry out ahead of any further work.
- **Project 2: Capital Project (2025-29/30)**
A reduced project that will secure the long-term sustainable future of the Hall of Clestrain through a mixed-use development combining heritage attraction, engagement, learning, community and commercial activities.

Having already secured a substantial Repair Grant offer from Historic Environment Scotland towards Project 1, the Society is working to secure match funds during 2024-6.

In parallel, and deeply mindful of the need to rescale its plans and develop its resilience and capacity to deliver, the Society has secured NLHF funds to support it in these endeavours. The project, Hall of Clestrain – Fit for the Future, commenced in August 2024 and will complete in October 2025.

3. SCOPE OF SERVICES

The John Rae Society invites proposals from experienced individuals/organisations to undertake an oral history pilot to research local family and folklore stories connected with the Hall of Clestrain and the Hudson's Bay Company (HBC) – the type of stories that only local people know.

The researcher should engage with local communities and individuals focused but not exclusively in and around the Hall, Orphir and Stromness to give them ownership and pride in this fascinating heritage by participating in activities such as storytelling and recording of oral heritage. The process of collecting the research should include, but is not limited to the following:

- Undertaking a suitable community engagement exercise (with support from the Engagement and Learning Coordinator) to identify appropriate individuals/groups for oral history interviewing
- Undertake a minimum of 10 interviews
- The interview questionnaire should endeavour to elicit material that adds to existing knowledge to better understand the role/impact of HBC employment in Orkney and on Orcadian men and women, and to start to elicit the ties formed with Canada First Nations, Métis and Inuit people
- A written summary of each interview should be provided
- Each interview should be logged and divided into themes
- Subject to consent, the consultant should be capable of video recording some interviews and extracting video segments for use in the Society's learning activities, future interpretation and for archiving
- A minimum of 3 audio snippets should be extracted from each interview and saved in a format that would permit use on the Society's website and social media platforms
- A high-resolution photo of each interviewee should be collected along with any memorabilia the interviewee consents to be copied
- Work with JRS and Orkney Archives to develop and implement a consent process whereby the collected material can be used by the Society in an ethical manner to promote its work, the Hall of Clestrain and Orkney's Hudson's Bay Company heritage
- Work with JRS and Orkney Archives to develop and implement an archive storage process to enable suitable archiving
- Back-up copies, original and processed files are to be provided for archival storage
- The successful candidate will be required to travel to various locations to undertake the necessary research and therefore must provide information which demonstrates they have sound knowledge of Health & Safety systems and procedures.

4. OUTPUTS

The key outputs from the contract are:

- To undertake community engagement activities (with support from the Engagement and Learning Coordinator) with relevant groups, schools and individuals to ensure that the key stories, folklore are identified
- To undertake (a minimum of 10) oral history recordings with local individuals and groups with the aim of creating 5 minutes of publishable content
- To provide the full recordings in digital format and provide clean edited versions that support the narratives of the project in digital format
- To provide a summary report of the oral history research that highlights key findings for each interview (no more than 10 pages)
- To capture key learnings from the pilot and scope and prepare a brief for a larger oral history project as part of a NLHF R1 Development Phase application
- To put in place suitable consent and archiving processes.

5. PROGRAMME

It is envisaged that the project timeline will be as follows:

Month / Year	Activity
November-December	Tender and interviews
December-January	Community engagement and preparation
January-March	Oral history interviews, reporting and creation of digital outputs
April '25	Final report and preparation of brief

Throughout the contract period the appointed consultant will be expected to work closely with the Engagement and Learning Coordinator and the Trustee lead for the Archives Research project, to ensure the projects are aligned and mutually supportive.

6. REQUIREMENTS FOR FULFILLING THESE SERVICES

We are looking for someone with experience in undertaking oral history projects who can sensitively explore complex subjects within a small island community context.

Excellent facilitation skills, combined with sensitivity, empathy, and respect for confidentiality will be important character traits in undertaking this work and in helping shape and guide a future project and the way in which the Society uses the information generated to shape its proposed project for the Hall of Clestrain.

The Consultant will be registered self-employed/employed by their consultancy company and responsible for their own National Insurance and Tax payments as required by HMRC.

7. TENDER REQUIREMENTS

Proposals should comprise the following.

7.1 Response to the brief

The response to the brief should include:

- A clear methodology statement for the delivery of the Services and Outputs detailed in Sections 3 and 4
- An outline work plan identifying key dates of all elements and sign-off points informed by this brief
- Confirmation of individuals who will fulfil the Services, including sub-contractors if relevant, and summary CVs (1 side of A4 max.), clearly highlighting relevant experience of named individuals (as opposed to company's broader ones)
- A detailed fee submission for each Service, detailing staff responsible, tasks, day rates and expenses.

7.2 Relevant experience

Please provide details of two relevant projects. For each project, include a description of the project, your/your company's and/or sub-contractors' role, client, budget and project dates.

7.3 Fees

The fee is to be a fixed lump sum of between £5,000-£7,000 for the provision of all Services as outlined in the Scope of Services.

The Fee is to include all expenses. This will include recording and editing costs, reports, travel costs, accommodation, disbursements and all other expenses and costs required in the provision of the Services. The fee should include VAT.

7.4 References

Please provide reference details of two recent contracts that are relevant to this project. Include the name and contact details of the client's representatives who can be approached for references. References will be taken up only before confirmation of appointment.

7.5 Insurance

The Consultant is required to have their own professional indemnity and public liability insurance of c.£1 million. JRS will require proof of these policies before appointment.

7.6 Tender return

Tenders must be submitted electronically to elo@johnraesociety.onmicrosoft.com no later than 12noon, Thursday 12 December 2024.

Tenders are to remain open for acceptance for a period of 60 days.

7.7 Tendering costs

JRS will not be responsible for or pay for any costs or expenses that are incurred by any tendering consultant in preparing and submitting their tender.

7.8 Contract award criteria

Tenders will be assessed on the following criteria:

- Response to brief and additionality **20%**
- Qualifications and Experience of **20%**
- Project Team and Resourcing **20%**
- Fee **40%**

Each proposal will be given a score. A proposal considered to be unsuitable shall be rejected at an early stage if it does not respond to key aspects of the brief. JRS shall notify tenderers of the rejection of their proposal after completing the selection process.

Tenders will be awarded on the absolute discretion of the JRS Board. The decision will be final and binding. No correspondence will be entered into.

7.9 Enquiries

Any enquiries arising from this invitation to tender must be submitted in writing via email to: elo@johnraesociety.onmicrosoft.com on or before 5pm, Tuesday 10 December 2024.