



## **THE JOHN RAE SOCIETY FIT FOR THE FUTURE PROJECT**

### **BRIEF FOR HALL OF CLESTRAIN OPTIONS APPRAISAL, FEASIBILITY ASSESSMENT, CONCEPT DESIGN AND BUSINESS PLAN**

#### **1. INTRODUCTION**

The John Rae Society (JRS) is looking to appoint a suitably qualified and experienced consultancy or multidisciplinary team to prepare an Options Appraisal, Feasibility Assessment, Concept Design, and Business Plan for Category A Listed Hall of Clestrain, Orkney.

The project will undertake an in-depth, pragmatic examination of options to develop the Hall as a vibrant heritage attraction and community resource, celebrating its role as the birthplace and childhood home of the famous Arctic explorer John Rae who discovered the final navigable link in the Northwest Passage, and exploring Orkney's links to Canada's Hudson's Bay Company, cross-Atlantic trade and Arctic exploration.

The appointed consultants will work closely with the Society to review previous project plans and feedback, shape options (including spatial planning and costs), identify a preferred option, examine its feasibility, prepare a concept design and produce a Business Plan to secure a viable, sustainable future for the Hall. It is anticipated that on completion of this work, the Society will submit a R1 Development Stage application to the National Heritage Lottery Fund. Therefore, all outputs need to comply with Heritage Fund R1 application requirements and guidelines.

This is part of a National Lottery Heritage Fund supported project that aims to build the resilience and capacity of JRS to care for this unique and internationally significant heritage and realise the benefits to the Orkney community and economy.

#### **2. BACKGROUND**

##### **The John Rae Society**

The John Rae Society ([www.johnraesociety.com](http://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 Society 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 included 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. The cost estimate was £8+ million.

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 the Hall:

- **Project 1: Save Hall of Clestrain (2024-25/6)**  
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 project that will secure a viable, 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 so that repairs can commence in 2025-26.

In parallel, and deeply mindful of the need to rescale its plans and develop its resilience and capacity to deliver, the Society has secured funding from the National Lottery Heritage Fund to support it in these endeavours. The project, Fit for the Future, commenced in August 2024 and will complete in October 2025, after which, ideally in November 2025, the Society will submit a R1 Development Stage application to the Heritage Fund for Project 2.

### **Hall of Clestrain and Arctic explorer John Rae**

Hall of Clestrain is an exceptionally rare and fragile survival of a mid-Georgian villa sited spectacularly in the Hoy and West Mainland National Scenic Area and overlooking Hoy Sound on Mainland Orkney. It lies within a well preserved and extensive contemporary designed landscape comprising axial approaches to the south, north and east, a very substantial walled garden with internal features, and several associated structures. The Hall itself is formally planned, with service court and flanking pavilions.

Dating to the 1760s, the Hall and designed landscape saw only minor secondary development and has essentially remained untouched. It has been unoccupied since the 1950s. Now derelict and on the Buildings at Risk Register for Scotland, the Hall preserves a wealth of mid-18th century interior features many of which are both exceptional survivals and highly vulnerable – particularly its timber structures, interior joinery and paint finishes that survive from the Georgian period.

In 2006, former Chief Inspector of Historic Buildings at Historic Scotland, John R Hume wrote 'This is a building, I would argue, of exceptional quality in an exceptional setting; one of the very best buildings of its scale and period anywhere in Scotland.' The Simpson & Brown Hall of Clestrain Conservation Plan (2024) assessed the Hall as having historic values of outstanding, or international, cultural heritage significance.

Hall of Clestrain is most notable as the birthplace and childhood home of John Rae – the famous Scottish Arctic explorer. Rae grew up in the house and learned to sail, shoot and fish in the surrounding area. He went on to become a surgeon with the Hudson's Bay Company (HBC) and mapped large parts of Canada's North Coast, largely on foot. Relying on advice from Canada's First Nations, Métis and Inuit people he travelled light and lived off the land. Rae discovered the last navigable link in what became the route for Roald Amundsen to sail through the Northwest Passage in 1903-6. Amundsen named this narrow waterway between King William Island and the Boothia Peninsula, Rae Straight.

Celebrated for his explorations, Rae's communication of the fate of the Franklin Expedition, including cannibalism among the last survivors, resulted in a popular backlash led by Franklin's wife and supported by Charles Dickens. Now with his findings proven, John Rae deserves to be commemorated as one of our greatest Victorian explorers, recognised alongside Scott, Shackleton and Franklin.

It was Rae's father, John Rae Senior, factor of Clestrain, who became a recruitment officer for the Hudson's Bay Company, who forged the link between his son and the HBC. With over 80% of the workforce being Orcadian in 1813, working as sailors, traders and administrators alongside Canada's indigenous peoples, this is a unique shared heritage between two Commonwealth countries that deserves to be rediscovered.



Hall of Clestrain © Rod Stowell



Hall of Clestrain Georgian interior © James Grieve

### 3. SCOPE OF SERVICES

We are seeking a suitably experienced consultancy or multidisciplinary team to work closely with the Society to undertake an in-depth examination of multiple options, identify a preferred option, rigorously assess its feasibility, prepare a concept design and produce a Business Plan to secure a viable, sustainable future for Hall of Clestrain.

Whilst aiming to preserve and revitalise the Hall as a vibrant heritage attraction and community resource, emphasis will be on potential commercial opportunities to optimise use of the Hall, flanking pavilions and wider site. Due to the seasonality of island tourism, and the post pandemic heritage sector, the project must explore multiple uses to diversify and maximise income streams throughout the year to reduce risk. Consideration should be given to opportunities linked to the adventuring and survival skills of John Rae, active health and wellbeing. In addition, although focused on heritage preservation, the Society wishes to explore possible uses of contemporary, sustainable design to create a flagship attraction in Orkney, especially in relation to any proposed new build.

A thorough process is required that completes all necessary tasks and delivers all necessary outputs of RIBA Stages 0-2 identified below, as well as updates the Hall of Clestrain Condition Report. In 2017 David Narro Associates prepared a Structural Appraisal of the Hall of Clestrain, updated December 2024, and Hutton + Rostron produced a Condition Report. Both reports will be made available to the appointed consultants who should note that the latter must be updated as part of this project so that an up-to-date document can be submitted as part of the Heritage Fund R1 application.

RIBA Stage 0 – Strategic Definition  
RIBA Stage 1 – Preparation and Briefing  
RIBA Stage 2 – Concept Design.

## 4. OUTPUTS

The required outputs are:

1. An **Options Appraisal** that presents clear and distinct options for the Hall, including site information, architectural proposals in sketch form, QS costs, and provides a clear and convincing analysis and recommendation for a preferred option, including commercial opportunities, and benefits and impacts on the heritage and other assets.

This should be presented as an interim report, accompanied by an in-person presentation in Orkney, to generate Board and stakeholder feedback to secure input/revision/approval to progress to the next stage.

2. A **Feasibility Assessment** that rigorously explores and analyses the possibility and ability of the preferred option to be delivered. It is expected that this will be presented as a second interim report that includes:
  - Project details
  - Initial architectural proposals - drawings in plan, elevation and section showing the preferred option in sufficient detail and annotated for costing
  - QS costs
  - Commercial opportunities and initial discussions
  - Benefits and impacts
  - Governance (informed by a wider Governance Review currently underway)
  - Funding research and identification of realistic and achievable funding opportunities
  - Feasibility assessment.

This should be presented in-person, in Orkney, followed by a feedback process involving the Board, key stakeholders and partners.

3. An **Architectural Concept** approved by the client and aligned to the Project Brief, incorporating Strategic Engineering requirements and aligned to a Cost Plan, Project Strategies and an Outline Specification.

This should be presented in-person, in Orkney, followed by a feedback process involving the Board, key stakeholders and partners, before finalisation.

4. A robust **Business Plan** based on the preferred option and Concept Design that fully complies with Heritage Fund R1 Business Plan requirements and includes the following:
  - Executive summary
  - Description and information about The John Rae Society (to include governance, Trustees and management structures (informed by the wider Governance Review)
  - Market appraisal (to include the results of project consultation)

- Strategic, policy and funding context
- Business model(s)
- Financial appraisal (to include income and expenditure forecasts)
- VAT advice
- Project cost plan and cashflow (for R1 Development Stage)
- Funding plan
- Risk Register (for R1 Development and R2 Delivery Stages; post completion)
- Organisational impact assessment
- Project programme (for R1 Development and R2 Delivery Stages); action plan
- Project management strategy (to include project management structure, procurement strategy)
- Appendices, as necessary.

A draft report should be presented in-person, in Orkney, followed by a feedback process involving the Board, key stakeholders and partners, before finalisation.

## 5. Updated **Condition Report**.

## 5. REQUIREMENTS FOR FULFILLING THESE SERVICES

Experience of creating viable options appraisals, feasibility assessments, concept designs and business plans for cultural and heritage organisations is essential, as is experience of working with old/listed buildings. If not a qualification in a related subject such as architecture, quantity surveying, construction management, engineering or business, then an excellent understanding of these areas plus a working knowledge of statutory and legal requirements surrounding this sort of development are vital.

## 6. PROGRAMME

Month / Year	Activity
January-February '25	Tender and interviews
March-April '25	Options Appraisal; Update Condition Report
March-August '25	Business Plan
May-June '25	Feasibility Assessment
June-August '25	Concept Design

Throughout the contract period the appointed consultant will be expected to work closely with the JRS Chair, Board and Project Manager to ensure the integration of wider project tasks and outputs.

## 7. TENDER REQUIREMENTS

Proposals should comprise the following.

### 7.1 Response to the brief

The response to the brief should include:

- A clear methodology for the delivery of the Services and Outputs detailed in Sections 3 and 4
- An outline work plan identifying key dates for 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 (2 sides of A4 max.), clearly highlighting relevant experience of named individuals (as opposed to company's more broadly)
- A detailed fee submission for each Service, identifying staff responsible, tasks, day rates and expenses.

## 7.2 Relevant experience

Please provide details of three 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 Fee proposal

The fee proposal is to be a fixed lump sum for the provision of all Services as outlined in the Scope of Services.

The Fee is to include all expenses. This will include printing costs, travel costs, any accommodation, disbursements, reports 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 could be approached for references. References will be taken up only before confirmation of appointment.

## 7.5 Insurance

Professional indemnity, employers' liability and public liability insurance of £10 million is required. JRS will require proof of these policies and their cover before appointment.

## 7.6 Tender return

Tenders must be submitted electronically to [projectmanager@johnraesociety.com](mailto:projectmanager@johnraesociety.com) no later than 12noon on Friday 21 February 2025.

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

Interviews will take place w/c 24 February 2025.

## 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 **25%**
- Qualifications and Experience of **20%**

- Project Team and Resourcing **25%**
- Fee **30%**

Each proposal will be given a score. A proposal considered to be unsuitable shall be rejected at this stage if it does not respond to important aspects of the brief. JRS shall notify unsuccessful 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 brief must be submitted in writing via email to:

[projectmanager@johnraesociety.com](mailto:projectmanager@johnraesociety.com)