



ELY CATHEDRAL

Ely Cathedral



Through Cracks and Colour: Conserving the Clerestory Windows and Telling the Tales Held in Glass

Activity and Interpretation Planner - Planning and
Delivery



Tendering Brief

Activity & Interpretation Planner Brief

Role: Activity and Interpretation Planner to support a Development Phase and potential Delivery Phase project funded by The National Lottery Heritage Fund at Ely Cathedral.

Consultant must have the ability to travel to Ely Cathedral as required.

Reporting to: Project Manager

Time frame for Development Phase work: August 2026 – August 2027

Time frame for potential Delivery Phase work: December 2027 – July 2029

1.0 Introduction

This document provides tender information and a brief for the appointment of a consultant to take on the Activity & Interpretation Planning of Ely Cathedral's 'Through Cracks and Colour' project funded by The National Lottery Heritage Fund (Heritage Fund). This project forms part of the Development Phase of a wider conservation initiative, which was awarded by the Heritage Fund in March 2026.

We would expect the successful bidder to work for us in the Delivery Phase as well, subject to a successful Delivery Phase application to the Heritage Fund and a successful consultancy performance review at the end of the Development Phase.

2.0 About Ely Cathedral

Highly regarded by historians and architects from all over the world for its beauty and size, Ely Cathedral is widely acknowledged as 'one of the wonders of the Medieval World'. Visible for miles around, the Cathedral is often referred to as 'The Ship of the Fens'. A monastery was first founded on the site in 673 by St. Etheldreda, a Saxon Queen, however, the present building dates from 1081 and was granted Cathedral status in 1109. It is a remarkable example of both Gothic and Norman architecture and has the third-longest nave of any UK Cathedral. Today, the Grade I listed Cathedral offers a glimpse into centuries of English heritage alongside stunningly beautiful art and architecture.

Ely Cathedral currently welcomes in the region of 200,000 visitors and pilgrims every year. As well as being a major visitor attraction, the Cathedral serves as a cultural focal point for East Anglia by providing a unique venue for the arts & music, exhibitions, concerts, and theatre. Despite these more recent adaptations into a living, vibrant community resource, Ely continues to exude spirituality and remains a sacred space for the benefit of all.

3.0 About the Project

The clerestory windows in the east end choir were designed to be a focal point of the Cathedral, welcoming light into the building and visually transforming the space. Situated in the upper stone storey raised above the level of the aisles, these windows represent a vital link to Victorian art and 19th century English history. However, the Cathedral's 2021 Quinquennial Report revealed serious issues with several clerestory windows, including mortar failure, gaps and breaks, structural instability, and bowing. The natural deterioration of these windows means

that without specialist timely intervention, these historic features and the Cathedral's ability to serve as a cultural focal point for East Anglia is at risk.

Following a successful Development Phase application to the Heritage Fund, the funding has enabled us to develop a wider heritage initiative that extends beyond the capital works to engage a more diverse audience in our shared heritage. In partnership with the Stained-Glass Museum, we will use the development phase to pilot a programme of activities and introduce new community and educational initiatives, as well as create the Activity and Interpretation Plan(s) required for our Delivery Phase submission.

If our Delivery Phase application is successful, our proposed capital works programme will see ICON- accredited stained-glass conservators undertake urgent conservation work, delicately repairing the clerestory windows both in-situ, where possible, and in their specialist workshop. Their work on all of the windows will require scaffolding internally and externally, protecting, recording, re-leading and re-cementing, conserving individual panes and fragments, replacing tie bars in phosphor bronze, and preparing and redecorating of ferramenta. To finally complete the transformation, all of the windows will be cleaned internally and externally, bringing the vivid colours and intricate details back to life. We hope that our Activity and Interpretation Plan(s) will deliver deeper public understanding and appreciation of the Cathedral's rich heritage, broadening participation across a wider range of audiences, and highlighting the historical and artistic significance of stained glass, a craft that is now listed as endangered in the UK.

The overall project is closely aligned with the Heritage Fund's Investment Principles: [1] Saving Heritage, [2] Protecting the Environment, [3] Inclusion, Access, and Participation, and [4] Organisational Sustainability. These themes also align with our wider vision for the Cathedral.

4.0 Timetable

The Development Phase of the project began in May 2026. We expect this phase to last 14 months with the Project Team aiming to submit a Delivery Phase application to the Heritage Fund for the August 2027 deadline. Subject to the award of the Delivery Phase application, the Delivery Phase would commence in December 2027 with a planned end date of July 2029.

Proposed Development Phase key milestones:

- | | |
|--|----------------|
| • Development Phase awarded | March 2026 |
| • Permission to Start completed | May 2026 |
| • Appointment of Project Manager | August 2026 |
| • Appointment of other project consultants | November 2026 |
| • Development Phase review | June 2027 |
| • Final drafts of all documents | July 2027 |
| • Second round bid submission | August 2027 |
| • Development Phase final report | September 2027 |

Proposed Delivery Phase key milestones (subject to a successful bid and award):

- | | |
|--------------------------|---------------|
| • Delivery Phase awarded | December 2027 |
|--------------------------|---------------|

• Permission to Start completed	January 2028
• Scaffolding erected	March 2028
• Activity and Interpretation programme begins	March 2028
• Building repair works begin	July 2028
• Scaffolding dismantled	February 2029
• Capital works completed	March 2029
• Activity and Interpretation programme complete	March 2029
• Final project report	June 2029
• Project signed off	July 2029

5.0 Background

To support our Development Phase application, we have already undertaken substantial scoping work which will be available to the appointed consultant. This has included; producing an initial audience report drawing on data from the Audience Agency, Ely and East Cambridgeshire ONS demographics, the Index of Multiple Deprivation, and relevant Cambridgeshire strategies and local plans. In addition, the report incorporates insights from previous visitor experience consultations and social media analytics. This pre-project work has enabled us to better understand current audiences, and begin to identify target groups, focusing on those that are underrepresented, and those facing barriers to engagement.

Using this evidence base and working collaboratively with specialist colleagues – Visitor Experience Manager, Director of Learning, and the Stained-Glass Museum – we already have a clear outline of pilot activities to be delivered in our Development Phase and have begun to generate activity ideas for the project's Delivery Phase. As considerable groundwork is already in place, we would expect the appointed consultant to test the suggested activities, identify gaps, and bring it all together into an Activity Plan and Action Plan, fully costed and with the briefs, and relevant outputs for the Interpretation commission.

Tenderers should note that this is a relatively modest project in scale. The proposed Plan(s) should therefore be proportionate in its ambition, scope, methodology and cost. Consultants should also be aware of the project's compressed Development Phase timetable.

A summary of the activities proposed for the project's Activity Plan at Development Phase application is outlined below:

- Stained glass tours to the public using Cathedral tour guides
- Specialist conservator talks to volunteers and the public
- Public scaffolding tours for an up-close experience
- Exhibition with interpretation panels on the ground floor and embedded time lapse videos
- Community art on what the windows inspire people to feel with an artist invited to begin the piece
- Welcome and Visitor Experience training for volunteers
- Staff and volunteer stained glass conservator workshop visit
- Festival/Open days including demonstrations of how stained glass is made

- Stained Glass Museum public and volunteer talks
- Painting and fused glass workshops with the Stained Glass Museum
- Joint schools programme with the Stained Glass Museum and Cathedral Learning Team
- Stained Glass Museum archival research

Overall, we aim to educate people about the art and heritage of stained glass, support and develop our volunteers through tailored training, and deliver a dynamic programme of new activities and events designed to engage a broad range of audiences.

6.0 Scope of Work

We now require a specialist Activity & Interpretation Planner to build on our work to date and develop and deliver the 'Through Cracks and Colour' Activity and Interpretation Plan(s). The Activity and Interpretation Plan(s) should build on existing audience research, consultation, and visitor experience review to shape initial ideas for activities and interpretation. With the support of Heritage Fund, we are open to the production of either two documents – a separate Activity Plan and Interpretation Plan - or one document - a single Activity and Interpretation Plan. The overall budget for activities in the project's Delivery Phase, excluding professional fees, is £37,442.

We expect, however, the Activity and Interpretation Plan(s) to follow the good practice guidance as outlined on the Heritage Fund's website and be compliant with Heritage Fund expectations at Delivery Phase application:

<https://www.heritagefund.org.uk/funding/good-practice-guidance/activity-plan>

<https://www.heritagefund.org.uk/funding/good-practice-guidance/interpretation>

Activity Planning

The appointed consultant/consultancy will test, extend and develop the current engagement, learning and participation programme. They will devise further plans and activities and will work collaboratively with Ely Cathedral's Head of Visitor Experience, Comms team, Learning Team, and other relevant members of the Cathedral team. In addition, the Activity & Interpretation Planner will also work collaboratively with other appointed project consultants to ensure co-ordination and to pilot proposals with audiences.

Nb. Some volunteer training is currently being scheduled into the Cathedral's calendar for the project's Development Phase to ensure availability. We anticipate this will take place at the end of January/early February 2027 as per the project's timetable.

Responsibilities for the Development Phase:

- Review existing Cathedral programming and documentation to gain a full understanding of the Cathedral's existing and potential audiences.
- Undertake research and a market assessment to identify any other potential audiences.
- Undertake consultation with stakeholders, target groups, the community, and current and potential visitors and produce a consultation report that pulls together key findings.
- Support the project's proposed pilot activities and ensure learning is captured within project planning.

- Write an Activity Plan or Activity and Interpretation Plan that draws together all the research and makes a cogent argument for target audiences and the activity programme.
- Produce a fully costed Action Plan.
- Ensure alignment of the Activity Plan or Activity and Interpretation Plan with the capital elements of the project.
- Ensure alignment of the Activity Plan or Activity and Interpretation Plan with the project Business Plan, particularly in relation to any revenue opportunities.
- Develop sustainability plans for project activities, including how they can be continued and developed after the project.
- Incorporate evaluation and feedback into the evolving Activity Plan.

Interpretation Planning

The appointed consultant/consultancy will produce overarching strategy and options for an interpretative scheme for the 'Through Cracks and Colour' project informed by consultation and collaboration with the activity planning process. The appointed consultant will also work collaboratively with Ely Cathedral's Head of Visitor Experience, Volunteer & Operations Manager, Comms team and other relevant members of the Cathedral team.

They will also create a costed interpretation plan detailing themes, audiences, objectives and outcomes and including concept visuals and an implementation plan.

Interpretation should be accessible to a wide range of audiences, recognising that people engage at different levels and have different accessibility needs.

Responsibilities include:

- Develop an understanding of the Cathedral's heritage and particularly the windows that form the focus of the capital works project using existing source material.
- Review existing interpretation and the current visitor experience on site, identifying strengths, gaps and opportunities to improve understanding, accessibility and engagement through the project.
- Work collaboratively with the relevant Cathedral teams, volunteers, and stakeholders to identify key stories and themes relating to the heritage under consideration as part of this project.
- Develop an Interpretation Plan or an Activity and Interpretation Plan in collaboration with the relevant Cathedral teams that sets out a clear, audience-focused framework for how the heritage will be communicated, both on-site and digitally.
- Propose a range of interpretation approaches ensuring they are inclusive, accessible and reflect a range of learning styles and needs.
- Consult and use test ideas, storylines, interpretative themes and proposed methods paying attention to the project's core and target audiences.
- Develop interpretive proposals in sufficient detail to inform Delivery Phase design, costs and feasibility (equivalent of RIBA work stage 3).
- Provide detailed costings for all proposed interpretive elements and ensure the plan is deliverable within the project's budget and timeline.
- Produce a robust, costed Interpretation Plan or Activity and Interpretation Plan in line with The National Lottery Heritage Fund good practice guidance.

General

Throughout their appointment we expect the consultant to:

- Be on site as required/agreed.
- Provide regular updates on progress as required/agreed.
- Attend monthly project meetings as agreed either remotely or in-person.
- Contribute to The National Lottery Heritage Fund Development Phase review and progress meetings as requested.
- Work with the Project Manager to develop and review the project timetable, milestones and risks.
- Work closely with the Evaluation Consultant throughout the project.
- Work with the Cathedral Visits and Comms Team to ensure that the values, standards and policies of Ely Cathedral are always upheld.
- The consultancy will assign the copyright of all outputs to Ely Cathedral, for use in connection with its operations. The consultancy must clear the copyright for any images, illustrations or other material used.

Responsibilities for the Delivery Phase are likely to include:

Activity Planning

- Act as a point of expertise for the delivery of the project Activity Plan by the Cathedral team, volunteers and project partner, providing guidance as required when activities are being delivered.

Interpretation Planning

- Support the Cathedral team, volunteers and project partner, to deliver the proposed design (RIBA work stage 4-7)
 - Edit copy to ensure consistency of messaging, storytelling, tone and voice, and design across interpretative materials developed by different team members, volunteers and project partner.
 - Support the development of briefs for the commission and contracting of suitable artists, designers and suppliers to undertake RIBA work stage 4-7.
 - Monitor the installation timetable and manage interdependencies of the interpretation design and production with other work areas and wider Cathedral activity.

General

- Attend project team meetings (online)
- Contribute to Heritage Fund reporting requirements, project evaluation and the final project report

7.0 Specification of experience and skills requirement

The following table defines the experience and skill set which the Cathedral is looking for and how they will be assessed (method of assessment MOA) either by tender submission (TS) and/or interview (I).

Criteria	Essential	M.O.A
Experience (Demonstrated by relevant previous commissions)	1. Experience of working within the heritage sector 2. Experience of developing and delivering both an Activity Plan and Interpretation Plan for at least one similar project on time and within budget 3. Experience of Activity Planning and Interpretation Planning for the Heritage Fund funded projects of a similar scale 4. Experience of working collaboratively with a wider project team	TS/I TS TS/I TS/I
Skills and Abilities (Demonstrated by relevant previous commissions and quality of methodology)	1. A demonstratable knowledge of developing and delivering Activity Plans and Interpretation Plans in the heritage sector 2. A good and up-to-date knowledge of the Heritage Fund's procedures, standards and reporting requirements 3. Exceptional interpersonal skills with the ability to communicate effectively 4. An understanding of the limiting factors involved with delivering programmes in Listed historic buildings 5. Detailed knowledge of consultative and evaluation processes 6. Ability to translate the project's visions and objectives into a delivered programme of work 7. Ability to work in sympathy with the ethos of the Church of England and the worship function of the Cathedral 8. Ability to use Microsoft Office 9. Exceptional presentation skills, both orally and written	TS TS/I TS/I TS TS/I TS/I TS TS TS/I

The successful consultant would be expected to adhere to the Cathedral's safeguarding policy and procedures. Additionally, subject to the advice from the Cathedral's Safeguarding Advisor once finalised, the consultant may also be assessed for a DBS check.

8.0 Reporting and Management

The freelancer/consultant would report to the Project Manager.

9.0 Deadline

Completed tenders should be returned by 5pm on 12/10/2026 to Lode Heritage, Project Manager. Dale Copley hello@lodeheritage.com and Megan Williams Megan@lodeheritage.com

No questions will be accepted after 5pm on 07/10/2026. It is the Tenderer's responsibility to ensure that they are received on time.

The shortlisted consultants will be asked to attend an interview at Ely Cathedral, where they will also be shown around the Cathedral.

Proposed interview date 27/10/2026.

If consultants cannot make the allocated interview date, they should state so in their submission and provide alternatives for the week beginning the 26/10/2026.

Following the interview, the appointment of the successful consultant will be confirmed and the anticipated start of the contract will be from 30/11/2026.

10.0 Fee

There is an indicative budget for this work of £20,000 including expenses, but excluding VAT, for the Development Phase.

A further budget of £10,000 including expenses, but excluding VAT, is allocated for the Delivery Phase.

11.0 Tender Submissions

The purpose of the tender response is to enable the Cathedral to evaluate your understanding of our requirements, the suitability of your proposed approach and experience and skills of your team. Your response should consist of the following:

1. How you will lead the development phase, including methodology, timetable, and milestones
2. If more than one person will be involved in this project, please provide details of the lead consultant and how the work will be distributed between the team
3. Brief CVs for all members of the team involved in this project
4. Details of relevant experience – two examples of recent and relevant work of similar size, scope and nature including two references from previous or existing clients
5. A firm quote for the work including all relevant expenses but exclusive of VAT
6. Details of any professional insurance

12.0 Evaluation Criteria

Tenders will be evaluated according to the following criteria:

- Methodology, understanding of the project brief, assessment of key issues, and how objectives will be met (30%)
- Relevant experience of developing and delivering an Activity Plan and Interpretation Plan for similar projects in the heritage sector, and track record of working effectively with different kinds of organisations (30%)
- Price (10%). The tenderer submitting the lowest overall price will receive the full score available. Remaining bids will be scored proportionately: $\text{Score} = (\text{lowest bid received} / \text{bid price}) \times 10\%$.
- Interview (30%)

The Cathedral will assess Tenderers' responses according to these criteria and will award points up to the maximum shown against each heading in the Quality evaluation assessment table below. Failure to achieve a rating of satisfactory (i.e. a minimum unweighted score of 3 or above) in any one or more categories may result in the bid being disqualified at the Cathedral discretion.

Assessment Criteria	Score
Unacceptable: Either no answer is provided, or the answer fails to demonstrate that any of the Cathedral's key requirements in the area being measured will be delivered	0
Poor: Fails to demonstrate how the Cathedral's basic requirements in the area being measured will be addressed, giving rise to serious concerns that acceptable outcomes would not be delivered against the project brief.	1
Weak: Barely demonstrates how the Cathedral's basic requirements in the area being measured will be addressed, giving rise to concerns whether acceptable outcomes would be delivered against the project brief.	2
Satisfactory: Demonstrates how the Cathedral's basic requirements in the area being measured will be addressed so as to deliver acceptable outcomes against the project brief.	3
Good: Demonstrates how most of the Cathedral's requirements in the area being measured will be assessed so as to deliver good outcomes against the project brief.	4
Excellent: Demonstrates clearly how all of the Cathedral's requirements in the area being measured will be fully addressed so as to deliver excellent outcomes against the project brief.	5

13.0 Additional Information

For more information about Ely Cathedral, visit our website at:

[Ely Cathedral - Ely Cathedral](#)

We can provide the following information on request:

1. The National Lottery Heritage Fund Development Phase application
2. The National Lottery Heritage Fund detailed budget breakdown
3. Project timetable
4. Activity Plan for the application

Please note the following:

Confidentiality

The Form of Tender, the Conditions of Contract, the Specification, and all other documentation or information issued by the Cathedral relating to the Tender shall be treated by the Tenderer as private and confidential for use only in connection with the Tender and any resulting contract and shall not be disclosed in whole or in part to any third party without the prior written consent of Cathedral.

The documents which constitute the project and all copies thereof are and shall remain the property of the Cathedral (whether or not the Cathedral shall have charged a fee for the supply

of such documents) and must not be copied or reproduced in whole or in part and must be returned to the Cathedral upon their request.

All information provided by tenderers as part of a tender return will be treated as confidential.