Invitation to Tender

**Commission for Project Manager/ Quantity Surveyor Consultancy Services for the Town Hall Transformation Project**

**(RIBA work stage 4: Contractor Procurement Action+ RIBA work stages 5 & 6: construction & handover)**

# July 2022



## Midsomer Norton High Street Heritage Action Zone: Town Hall Transformation Project – Project Manager/ Quantity Surveyor Consultancy Tender Brief

**SECTION 1 – TENDER SUMMARY AND SCOPE**

* 1. Following a successful grant funding bid awarded in August 2020, Midsomer Norton’s High Street has been designated as a High Street Heritage Action Zone (HSHAZ) and awarded funding from Historic England and the West of England Combined Authority. The HSHAZ project aims to deliver transformative change to the High Street through several projects including the redevelopment of the Grade II-listed Town Hall.
  2. Built in 1859, the Town Hall had various community uses through the C19 and C20 which resulted in the loss of the original market hall at ground floor through subdivision and the creation small rooms, internal hallways and circulation spaces. These spaces lack flexibility and are now considered unfit for purpose.
  3. Phase 1 of the Town Hall Transformation Project is to reinstate the original open-plan ‘market hall’ at ground floor to provide a location for markets and civic, community, arts and cultural events and activities. Phase 1 will also include ancillary spaces within the ground and first floors.
  4. Phase 2 of the project will include works to the existing upper floors as well as the construction of an extension to accommodate meeting rooms, offices, a café bar and catering facilities to the rear of the building. Phase 2 is subject to agreement of additional funding and is not within the scope of the present Brief.
  5. Midsomer Norton Town Council and the Town Trust have already secured planning and listed building consent for these works (21/00914/FUL and 21/00915/LBA) which are being progressed to detailed design. We now wish to appoint an appropriately qualified and experienced Project Manager/ Quantity Surveyor to deliver the project from RIBA 4 (Principal Contractor procurement) through to RIBA 6 (completion and handover).
  6. The Project Manager/ Quantity Surveyor will be expected to tender the appointment & coordinate with the separately-appointed Mechanical & Electrical Engineer, Structural Engineer, and Architect/ Contract Administrator.
  7. **Please note that Phase 2 funding is secured up to RIBA 4. Progress onto RIBA 5-6, is subject to further fundraising being secured therefore there is effectively a break-clause which the client can implement at the end of RIBA 4. This appointment will only continue after RIBA 4 subject to a) the satisfactory delivery of the scope of this appointment, and b) sufficient funding to enable a contract to be entered into with the successful Principal Contractor.**
  8. The construction programme is TBC pending appointment of the Principal Contractor, but it is envisaged that it will be c.12 months. The value of Phase 2 construction works is estimated at £1,132,048.

**Project Manager Scope of Works**

1 Attend Client, design, Project, construction and other meetings as provided under this Appointment.

2 Convene and chair all principal Project meetings.

3 Prepare and maintain a Project execution plan, identifying the roles and responsibilities of the Client, the Professional Team, the Contractor and subcontractors, suppliers and any client directly procured contracts.

4 Issue instructions, on behalf of the Client, to the Professional Team and Contractor in accordance with the terms of their appointments/the Building Contract.

5 Manage and monitor the performance of the Professional Team and the Contractor. Report to the Client.

6 Check applications for payment from the Professional Team. Recommend payments to the Client.

7 Check other invoices related to the Project (other than formal instructions raised under construction contracts). Recommend payments to the Client.

8 Liaise with the Professional Team, prepare and manage the Programme for the design, procurement and construction of the Project. Monitor actual against planned progress, identifying corrective actions/recommendations.

9 Liaise with the Professional Team and prepare regular quality, progress and cost reports. Advise the Client of any decisions required and obtain authorisation.

10 Establish and implement change control procedures, addressing Project, design and construction change.

11 Manage and lead the procurement process, including post-tender interviews.

12 Liaise with the Professional Team and prepare a tender report. Prepare recommendations for the Client’s approval.

13 Conduct negotiations with tenderers. Obtain documentation from the Professional Team to confirm adjustments to the tender sum. Prepare recommendations for the Client’s approval.

14 Obtain confirmation that required insurances are in place prior to commencement of works on the Site.

15 Obtain authorisation from the Client for additional costs where the Consultant’s limit of authority is exceeded.

16 Undertake regular Site inspections. Obtain progress and quality reports from Site staff representing the Client, the Professional Team and the Contractor.

17 Agree all test certificates and statutory and non-statutory approvals required from the Professional Team and the Contractor. Prepare recommendations for the Client’s approval.

18 Liaise with the Client, the Professional Team and the Contractor and prepare and maintain a handover plan, or similar management tool, identifying the roles and responsibilities of each.

19 Facilitate agreement to the final account or similar financial statement from the parties to the Building Contract.

**Quantity Surveyor Scope of Works**

1 Prepare, maintain and develop a cost plan and forecast.

2 Advise on the cost of the Professional Team’s proposals periodically as the design proceeds, including effects of alternative forms of design, procurement and construction, etc. Advise on any cost variances to the allowances contained in the cost plan. Advise the Client on the likely effect of market conditions.

3 Prior to starting works on-site, confirm the scope of the Building Contract(s) to the Client and advise on additional works required by third parties.

4 Liaise with the Client’s insurance advisers and advise on construction related insurances (excluding the administration of claims).

5 Liaise with the Client’s legal advisers and advise on warranties/third party rights, etc. Liaise with the Client’s legal advisers and advise on bonds for performance and other purposes.

6 Liaise with the Client’s legal advisers and advise on the use and/or amendment of construction industry standard forms of Building Contract or contribute to drafting of particular Client requirements.

7 Advise on the rights and obligations of the parties to the Building Contract.

8 Advise on tendering and contractual procurement options. Prepare recommendations for the Client’s approval.

9 Obtain tender drawings and specifications from the Client and the Professional Team.

10 Liaise with the Client and the Professional Team and prepare tender documentation.

11 Prepare bills of quantities for inclusion in tender.

12 Prepare schedules of rates, activity schedules or other pricing documents, for inclusion in tender documents (excludes MEP bills of quantities).

13 Advise on suitable tenderers for the works required on the Project. Prepare recommendations for the Client’s approval.

14 Investigate prospective tenderers for the Building Contract(s) r subcontract(s) and advise the Client on their financial status and technical competence. Prepare recommendations for the Client’s approval.

15 Attend and participate in interviews of prospective tenderers for the works required on the Project.

16 Arrange delivery of tender documents to selected tenderers for the works required on the Project.

17 Liaise with the Professional Team and advise on errors, omissions, exclusions, qualifications and inconsistencies between the tender documents and the tenders received. Prepare recommendations for the Client’s approval.

18 Comment on the tenderers’ design and construction programmes and method statements.

19 Liaise with the Professional Team and prepare a tender report. Prepare recommendations for the Client’s approval.

20 Conduct negotiations with tenderers. Prepare documentation to confirm adjustments to the tender sums. Prepare recommendations for the Client’s approval.

21 Obtain confirmation from the Contractor that required Contractor or subcontractor insurances are in place prior to commencement of works on the Site.

22 Obtain contract drawings and specifications from the Client and the Professional Team. Liaise with the Client’s legal advisers, prepare the contract documents and deliver to the Client and the Contractor for completion.

23 Visit the Site periodically and assess the progress of the Project for interim payment purposes.

24 Advise on the cost of variations to the works prior to the issue of instructions under the Building Contract.

25 Agree the cost of instructions, excluding loss and expense claims, issued under the Building Contract.

26 Advise on the rights and obligations of the parties to the Building Contract.

27 Prepare recommendations for interim payments to the Contractor and the release of retention funds.

28 Advise the Client in regard to payment notices, pay less notices and other similar notices of default.

29 Prepare for issue payment notices, pay less notices and other similar notices of default.

30 Prepare the final account or similar financial statement. Facilitate agreement to the final account or similar financial statement from the parties to the Building Contract. For the purposes of this clause the final account or similar financial statement excludes the assessment of loss and expense claims.

31 Where relevant, prepare recommendations for the payment of liquidated asset damages.

**SECTION 2 – TENDER DETAILS**

|  |  |
| --- | --- |
| **Indicative Output** | **Indicative Timeframe** |
| With the Quantity Surveyor and Project Manager, undertake the preparation, issue and evaluation of the Principal Contractor Invitation to Tender. NB it is anticipated that the contract will be JCT Standard (TBC). | Issue by Mid January 2023, appointment by Mid May 2023 |
| Provide all Quantity Surveying works as required to deliver Phase 2 RIBA 5-6. | May 2023 – May 2024 |
| Provide Project Management services as specified during works on site RIBA 5-6. | May 2023 – May 2024 |

* 1. Should any tender wish to suggest adjustments to these outputs and timeframes a short explanation for adjustments and revised programme suggestions should be included to explain the benefits of any proposed amendments.
  2. This is a contract for design and consultancy services. The Fee Proposal should include a detailed and itemised breakdown for each element alongside an outline methodology of how you would approach the project. Details of who will be working on the project, their experience, day rate and schedule of time committed to key tasks should also be submitted.
  3. The consultancy appointment will be made by Midsomer Norton Town Council in close partnership with the Town Trust and other stakeholders.
  4. As a key community building, the Town Hall received over 40,000 visits a year before the Covid-19 pandemic. So, in considering the Architect/ Contractor Adminsitrator inputs (and wider works) for each Phase, the appointed consultant and/or subconsultants should be mindful of the project phasing and ensuring the work of Town Hall users can continue at the same time.

## SECTION 3 –TENDER EVALUATION

* 1. The tenders will be considered using quality and competency criteria and cost criteria on a 70:30 basis. The following quality and competency criteria will be used to assess the tenders (70%):
     + Comprehensive understanding of Project Manager/ Quantity Surveyor processes, planning and delivery for construction projects within listed buildings (30%)
     + Experience of successfully providing Project Manager/ Quantity Surveyor consultancy to design teams and project stakeholders for phased and grant-funded schemes (20%)
     + Demonstrable ability and capacity to deliver the project on time and within budget (20%)

## SECTION FOUR – ADDITIONAL INFORMATION

* 1. Alongside the PM and QS, the Town Clerk will support the appointed consultant as far as possible and continue to lead on aspects relating to the wider project, including day-to-day management responsibilities and liaison with project stakeholders and appointed professionals.
  2. Alongside day-to-day discussions with the project team, the appointed consultant will be expected to attend a fortnightly Client Design Team Meeting chaired by the Project Manager and liaison meetings as required to meet the project programme. This may include meetings with the Town Council and Town Trust. As such, there will be opportunities to seek feedback and input from these groups at key milestones.
  3. Background documents for context and information can be found: <https://www.bathnes.gov.uk/webforms/planning/details.html?refval=21%2F00915%2FLBA#details_Section> and <https://www.bathnes.gov.uk/webforms/planning/details.html?refval=21%2F00914%2FFUL#details>

## SECTION FIVE - PROCUREMENT PROGRAMME

* 1. The indicative timetable for procurement is set out below. This is intended to guide the engineering inputs and, whilst the Council does not wish deviate from this unnecessarily, it is recognised that this will naturally change and develop as the commission progresses. It should however be noted that that timescale is challenging and that the detailed design needs to be prepared by December 2022 at the latest.

**Please note that all dates are aspirational and reflect the current understanding of works required. As such they are subject to change as the project progresses and are subject to fundraising.**

|  |  |
| --- | --- |
| **Date or Target Date** | **Activity** |
| **Wednesday 20th July 2022** | Tender Brief issued |
| **Friday 19th August 2022** | Closing date and time for receipt of Fee Proposals including  breakdown of costs and any relevant examples of similar work |
| **Friday 26th August 2022** | Consultant appointed, project inception meeting and commencement of outputs. Contract signed. |
| **End December 2022** | Completion of detailed design for Phase 2 |
| **March – April 2023** | Phase 2 - Contractor procurement |
| **May 2023** | Principal Contractor appointed pending successful fundraising |
| BREAK CLAUSE – WORK PROGRESSES TO RIBA 5 DEPENDANT ON FUNDING | |
| **May 2023 – May 2024** | Works on Site |

## SECTION SIX - SUBMISSION OF FEE PROPOSAL AND COST BREAKDOWN FOR TENDER

* 1. Please submit by 10:00am on Friday 19th August:
     + **A Fee Proposal.**

This should include a detailed and itemised breakdown for each element (referenced against the activity schedule) alongside an outline methodology of how you would approach the project. Details of who will be working on the project, their experience, day rate and schedule of time committed to key tasks should also be submitted;

* + - **Any relevant examples of similar project work;**
    - **A Supplier Questionnaire and Non-Collusion Certificate (see Appendices 1 and 2).**
  1. These documents should be submitted by email to Donna Ford – Town Clerk ([townclerk@midsomernortontowncouncil.co.uk](mailto:townclerk@midsomernortontowncouncil.co.uk))
  2. Further to information provided within this tender brief, the Town Council and Town Trust will supply additional background information if requested and reasonably required to assist potential and appointed consultants. This may include the following:
     + Background information including records of past planning permissions, planning policy documentation, listed building consents and any other relevant information contained within the planning, archival or Town Council records;
     + Previously published and unpublished documents including available technical information from internal teams, contractors and external consultants.

## Appendices

1.0 Supplier Questionnaire

2.0 Non-Collusion Certificate

## APPENDIX 1 – SUPPLIER QUESTIONNAIRE

The purpose of the Questionnaire is to enable the Council to assess supplier suitability for providing goods and services.

## Notes for completion

i. Please ensure that all questions are completed in full, and in the format requested. Failure to do so may result in your submission being disqualified. If it does not apply to you, please state clearly ‘N/A’.

ii Should you need to provide additional Appendices in response to the questions, these should be numbered clearly and listed as part of your declaration.

1. Please return a completed version of this document with your Quote submission using the e- procurement system.

## Verification of Information Provided

1. Whilst reserving the right to request information at any time throughout the procurement process, the Council may enable the Supplier to self-certify that there are no mandatory/ discretionary grounds for excluding their organisation. The Council will request evidence from the winning Contractor only after the final Quote evaluation decision.

## Sub-contracting arrangements

1. The Supplier should advise in a separate appendix the names of sub-contractors, the percentage of work being delivered by each sub-contractor and the key contract deliverables each sub-contractor will be responsible for.

## Confidentiality

1. The Council reserves the right to contact the named customer contact in section 6 regarding the contracts included in section 6. The named customer contact does not owe the Council any duty of care or have any legal liability, except for any deceitful or maliciously false statements of fact.
2. The Council confirms that it will keep confidential and will not disclose to any third parties any information obtained from a named customer contact, other than to the Cabinet Office and/or contracting authorities defined by the Public Contract Regulations.

|  |  |  |  |
| --- | --- | --- | --- |
| **2.1 Supplier Details** | **Answer** | | |
| Full name and address of the Supplier |  | | |
| Registered company/charity number |  | | |
| Registered VAT number |  | | |
| Name of parent company |  | | |
| Please mark ‘X’ in the relevant box to indicate your trading status | i) a public limited company | * Yes | |
| ii) a limited company | * Yes | |
| iii) a limited liability partnership | * Yes | |
| iv) other partnership | * Yes | |
| v) sole trader | * Yes | |
| vi) other (please specify) | * Yes | |
| Please mark ‘X’ in the relevant boxes to indicate whether any of the following classifications apply to you | i)Voluntary, Community and Social Enterprise  (VCSE) | * Yes | |
| ii) Small or Medium Enterprise (SME) 1 | * Yes | |
| iii) Sheltered workshop | * Yes | |
| iv) Public service mutual | * Yes | |
| **Bidding model** | | | |
| **Please mark ‘X’ in the relevant box to indicate whether you are;** | | | |
| a) Bidding as a Prime Contractor and will deliver 100% of the key contract deliverables yourself | | | * Yes |
| b) Bidding as a Prime Contractor and will use third parties to deliver some of the services | | | * Yes |

|  |  |
| --- | --- |
| **2.2 Contact details** | |
| Supplier contact details for enquiries | |
| Name |  |
| Postal address |  |
| Phone |  |

|  |  |
| --- | --- |
| Mobile |  |
| E-mail |  |

|  |  |
| --- | --- |
| **2.3** | **Technical and Professional Ability** |
| **a.** | **Relevant experience and contract examples**  Please provide details of up to two contracts, in any combination from either the public or private sector; voluntary, charity or social enterprise (VCSE) that are relevant to our requirement. VCSEs may include samples of grant-funded work. Contracts for supplies or services should have been performed during the past three years.  The named contact provided should be able to provide written evidence to confirm the accuracy of the information provided below. |

|  |  |  |
| --- | --- | --- |
|  | **Contract 1** | **Contract 2** |
| **Name of customer organisation** |  |  |
| **Point of contact in the organisation** |  |  |
| **Position in the organisation** |  |  |
| **E-mail address** |  |  |
| **Description of contract** |  |  |
| **Contract Start date** |  |  |
| **Contract completion date** |  |  |
| **Estimated contract value** |  |  |

# APPENDIX 2 – NON-COLLUSION CERTIFICATE

I, the undersigned, in submitting the accompanying Quote to (Name of Client)………………………………………………

……………………………………………………………………………………………… in relation to (details of Quote and reference)……………………………............

………………………………………………………………………………………………. certify on behalf of (name of supplier)……………………………………………… that, with the exception of any information attached hereto (see \* below):

1. this Quote is made in good faith, and is intended to be genuinely competitive;
2. the amount of this Quote has been arrived at independently, and has not been fixed, adjusted or influenced by any agreement or arrangement with any other undertaking, and has not been communicated to any competitor;
3. we have not entered into any agreement or arrangement with any competitor or potential competitor in relation to this Quote;
4. I have read and I understand the contents of this Certificate, and I understand that knowingly making a false declaration on this form may result in legal action being taken against me.

In this certificate, the word ‘competitor’ includes any undertaking who has been requested to submit a Quote or who is qualified to submit a Quote in response to this request for Quote, and the words ‘any agreement or arrangement’ include any such transaction, whether or not legally binding, formal or informal, written or oral.

\* Information is/is not attached hereto (delete as appropriate)

SIGNED:....................................................

FOR AND ON BEHALF OF:........................................

DATE:.........................................