



T 01924 848806  
F 01924 840694  
[www.ncm.org.uk](http://www.ncm.org.uk)

Date: 03/05/2018

Reference: PRO-TEN-007

## **Coalfield Conversations Wayfaring**

### **INTRODUCTION AND PROCUREMENT PROCEDURES DOCUMENT**

## **CONTENTS**

- 1. Purpose and Scope of Document**
- 2. Introduction**
- 3. Background**
- 4. Sustainability and Innovation**
- 5. Objective of the Project**
- 6. Procurement Procedure**
- 7. Programme for Delivery**
- 8. Site Visits**
- 9. Tender Phase**
- 10. Technical Assessment**
- 11. Scoring**
- 12. Guidelines**
- 13. Assessment and Feedback**

**Appendix A – Whistle Blowing**

**Appendix B – Values and Principles**

**Appendix C – Transparency Guidance**

## **1. Purpose and Scope of Document**

The purpose of this document is to explain the procurement process and the objective of the procurement process.

## **2. Introduction**

Thank you for showing an interest in the Coalfield Conversations Realisation Project.

The National Coal Mining Museum for England is seeking to appoint a contractor to provide the requirements described in the information documentation commencing on 9<sup>th</sup> July 2018.

## **3. Background**

The National Coal Mining Museum for England aims to keep coal mining alive by collecting and preserving the industry's rich heritage, creating enjoyable and inspiring ways to learn for people of all ages, backgrounds and abilities.

In 1988 the Yorkshire Mining Museum opened at Caphouse Colliery. It was established with funding from West Yorkshire and South Yorkshire Metropolitan County Councils, Wakefield and Kirklees Metropolitan District Councils and technical support and assistance from British Coal.

The Museum was granted national status in 1995. Following this the Department for Culture, Media and Sport carried out a detailed study into the Museum, and in 1998 provided funding which secured its long-term future. In 2001 the Museum received a Heritage Lottery Fund Grant of just over £4.5 million. The Museum raised just under £2 million to complement this grant. Work carried out using this money included restoring buildings, new gallery areas and the store for large machinery. In 2002 additional Grant-in-Aid funding enabled free admission to the Museum for all visitors.

The National Coal Mining Museum for England is funded by Grant-in-Aid from the Department of Culture, Media and Sport through the National Museum of Science and Industry along with additional funding from the Coal Authority and charitable donations from members of the public. The National Coal Mining Museum for England takes pride in its achievements, quality and motivation of staff, and is focused on delivering its high level objectives.

## **4. Sustainability & Innovation**

The National Coal Mining Museum for England expects its suppliers to work collaboratively and be supportive of its approach to continually improve performance and efficiencies, through the selection of sustainable products and solutions, innovative thinking and the employment of best practice to meet its objectives and targets.

The National Coal Mining Museum for England recognises that improving its performance is an ongoing process and that its suppliers are important partners in our aim to become more sustainable.

Our commitment to innovation and sustainability can be seen in the on-going conservation and development of the buildings at Hope Pit, along with the installation of a state-of-the-art environmentally sound water treatment scheme. Suppliers should be aware of the need to ensure

## **OFFICIAL – SENSITIVE: COMMERCIAL**

viable, long term solutions that are sustainable, ethical and in keeping with the stated objectives and commitments of the National Coal Mining Museum for England.

### **5. Objective of Project**

The National Coal Mining Museum for England was recently awarded a grant through the Heritage Lottery Fund, to both redevelop the welcome area and visitor entranceway and also to improve and redesign wayfaring and signage across the site. As part of the application process a design company was appointed to work with the National Coal Mining Museum for England to develop the strategy and draft an implementation plan and design.

Following on from this we are looking to work with a partner to realise and implement a wayfaring scheme sympathetic in tone, feel and approach to the design for the visitor hub detailed in the interpretation plan. The National Coal Mining for England requires delivery partners that will facilitate the achievement of this vision in an open manner and with mutual trust and co-operation. The currently appointed design company have completed the interpretation plan to its current state (RIBA 3) however this design will be on-going until finished (RIBA 6) and finalised (RIBA 7). Throughout the process the awarded partner will be required to work closely with the previously appointed designer to ensure a successful implementation of a sympathetic wayfaring design, concept and implementation.

The scope of the project is to create a concept, strategy and design for wayfaring around site along with conduct the implementation and delivery of all signage, graphics and pertinent indicia. It must describe the journey of visitors and guests in an organic and natural fashion, seamlessly leading from point of interest to point of interest, increasing footfall to currently underexplored parts of the site.

One aspect of the wayfaring design will be the creation of a new, simple to follow, easy to use map to aid in orientation and delivery of the visitor and guest journey. In future this map will be digitised and made interactive so while this should be considered in the development and selection of the appropriate cartography it is not within the scope of this project directly.

The successful partner will be expected to produce and install new graphics, both 2 and 3 dimensional in form both inside and outside, work with focus groups and consultancy groups to ensure a successful implementation and realisation and work to reuse, refit and reinterpret existing wayfaring to support the production and installation of new elements. A full list of the required items is detailed in the Works Information Documentation.

Both parties need to operate on the understanding that the National Coal Mining Museum for England must receive value for money whilst the contractors must make a reasonable profit.

### **6. Procurement Procedure**

The process will be managed in house by the National Coal Mining Museum for England's procurement process. There is no cost to the supplier for registering a bid.

The Prequalification Questionnaire must be completed and returned to the National Coal Mining Museum for England by email, directly to [procurement.officer@ncm.org.uk](mailto:procurement.officer@ncm.org.uk). Following this full ITT documentation will be forwarded back by email.

ITT documentation must be completed and returned to the National Coal Mining Museum for England by email, directly to [procurement.officer@ncm.org.uk](mailto:procurement.officer@ncm.org.uk).

Any questions in respect of the tender documentation are to be sent via email, directly to [procurement.officer@ncm.org.uk](mailto:procurement.officer@ncm.org.uk). This ensures that a complete audit trail of the process is achieved.

## OFFICIAL – SENSITIVE: COMMERCIAL

Questions raised which result in additional information being provided will be shared with all organisations together with the National Coal Mining Museum for England's response, but will not breach any areas of commercially sensitive information.

The National Coal Mining Museum for England accepts no liability for any costs incurred by organisations in respect of preparing and submitting documentation to any element of the procurement process.

### 7. Programme for Delivery

Phase	Process	Date
Tender	Contract Notice Published	04/05/2018
	Tender Documentation available	04/05/2018
	Deadline for Queries	08/06/2018
	Tender Closing Date	08/06/2018
	Evaluation of Tenders starts including any clarifications*	22/06/2018
Award	Award Notification*	06/07/2018
	Contract Award *	09/07/2018

\*Any Changes will be notified as appropriate throughout the procurement process.

### 8. Site Visit

Interested parties are invited to visit the National Coal Mining Museum for England for an escorted inspection. This can be arranged directly through the National Coal Mining Museum for England's e-sourcing portal.

Available dates are between 7<sup>th</sup> May 2018 and 25<sup>th</sup> May 2018. As we are a publically accessible site you are welcome to visit in your own time in an informal capacity.

### 9. Tender Phase

#### Selection Criteria/Scoring

The ITT Bid evaluation will be based on the technical and financial proposals within the bids and the information set out in each compliant bid.

Bidders must accept the National Coal Mining Museum for England's terms & conditions.

Conditions of contract will be the NEC3 ECSC Standard Form Contract. Appropriate Z clauses relevant to the scope of activities outlined in the specification have been included but kept to a minimum.

The National Coal Mining Museum for England will reject any Bid which is not a Compliant Bid.

A Bid shall only be a Compliant Bid if the following documents have been completed and submitted:

- Prequalification Questionnaire – with supporting documentation included as required
- Technical Questionnaire – with supporting documentation included as required

## **OFFICIAL – SENSITIVE: COMMERCIAL**

- Commercial Offer – with supporting documentation included as required

The Evaluation of the ITT responses will be carried out in two stages.  
These stages are:

- Stage One: Core Assessment;
- Stage Two: Technical Assessment.

### **Stage 1 – Core Assessment**

The assessment at Stage 1 will comprise of a number of questions on the following topics:

- General & Organisation.
- Economic & Financial, Legal Standing and Insurance.
- Safety, Health & Environmental Issues.

These elements will be assessed on a minimum “meets requirements” basis.

The National Coal Mining Museum for England reserves the right to exclude any bid that does not meet the minimum requirements for these elements.

The “meets requirements” score required in the health and safety and environmental sections of the questionnaire is 40%.

The National Coal Mining Museum for England reserves the right to exclude any submission not achieving this minimum requirement for those sections.

The National Coal Mining Museum for England reserves the right to exclude any bid from this process if it establishes that the economic operator has been convicted of any of the offences defined in Regulation 57 of the Public Contract Regulations 2015.

Bids meeting requirements will then be evaluated on the basis of the most economically advantageous tender. The weighting to be applied to scoring questions within the tender will be as follows:

**Technical / Quality – 85%**

**Price – 15%**

## **10. Technical Assessment**

The following information will be assessed and the selection will be based on the demonstration of the ability to deliver the requirements detailed within the works information.

- Competence
- Capability
- Capacity
- Planning
- Qualifications & Experience

## 11. Scoring

Scoring questions are identified within the tender and the table below provides a summary of the scoring to be applied.

Score Categories	Meaning	Scores
Adds Value	The evaluators believe that as well as meeting requirements in all respects, the response has additional features that benefit and adds value for the National Coal Mining Museum for England	5
Fully Acceptable	The evaluators are fully satisfied that the proposal meets the requirement in all aspects	4
Minor Reservations	The evaluators are confident that the supplier has the ability to meet the requirement but have some minor reservations	3
Significant Reservations	The evaluators believe the supplier has the ability to partially meet the requirement, but has some major reservations about the approach or solution proposed. The supplier has not met the minimum requirements as specified.	2
Requirement Not Met	The evaluators believe that the evidence fails to show that the contractor is capable in the requirements area	0

The following questions are the scoring questions:

Subject	Question	High Scoring Response
<b>Graphics – 25% weighting</b>	<p>Demonstrate your experience in the successful design, production and installation of graphics or graphical elements with are relevant or similar to the scope of this contract.</p> <p>Please include detailed information on the scope of three previous projects, the extent and detail of the works or services involved, location and value.</p>	<p>Technically relevant examples provided.</p> <p>Sites closely match NCMME and the extent of works / services required.</p> <p>Responses with technical content providing significant detail to assure technical capability.</p>
<b>Wayfaring – 25% weighting</b>	<p>Demonstrate your experience in the design of site maps and the implementation of successful wayfaring schemes.</p> <p>Please include by way of attachment relevant examples of work that your organisation completed in the last three years</p>	<p>Number of projects completed that evidences both capacity and technical capability.</p> <p>Responses with technical content providing significant detail to assure technical capability.</p>
<b>Focus Groups and Consultancy – 15% weighting</b>	<p>Evidence your knowledge and understanding of working with focus groups and external consultation to ensure a successful implementation.</p> <p>By way of an attachment please provide an outline programme for consulting with the public and in gathering feedback to influence the success of the project.</p> <p>This could be in any form but should clearly</p>	<p>Submission that provides evidence of record keeping and reviews.</p> <p>A programme that shows an understanding that reviews may affect the planning and implementation and a comfort in being responsive to it.</p>

## OFFICIAL – SENSITIVE: COMMERCIAL

Subject	Question	High Scoring Response
	illustrate the detail of recordings and how they may influence the process.	
<b>Longevity – 15% weighting</b>	<p>Please give a proposed lifetime for the produced signage and installed elements in reference to previous projects.</p> <p>This should be based upon prior experience, grounded in fact and take into account weather proofing, visitor interaction or other variable as determined by proposed delivery.</p>	A projected longevity which exceeds the lifetime of the project, supported by evidence to demonstrate the reasonableness of the timeframe suggested.
<b>Reuse / Redevelopment – 10% weighting</b>	Demonstrate your experience in redeveloping and redeploying existing signage / infrastructure to make the most of the resources we have at hand.	Examples of reskinning or innovative ways to reuse the materials on site which would otherwise be removed through the scope of the suggested project
<b>Experience – 10% weighting</b>	Evidence of experience working with both indoor and outdoor graphics, weather proofing techniques alongside relevant qualifications for safe delivery of the proposition.	<p>Evidence of prior projects which required an understanding of the differing challenges of indoor and outdoor working</p> <p>Details of the experience of staff members / teams with relevant qualifications were appropriate.</p>
<b>Delivery – for information only</b>	<p>By way of an attachment please detail how you will deliver the various requirements of this project. Will all elements be delivered by direct labour or will specialist sub-contractors be utilised?</p> <p>If work is to be sub contracted please detail the organisations concerned and the vetting process.</p>	This is not a scoring question and is for information only.

Each question will be individually assessed.

The National Coal Mining Museum for England reserves the right to deem any submission scoring a 0 or 2 for any scored question as non – compliant and as such may be excluded from further consideration.

## 12. Guidelines

The questionnaire should be completed by a partner/director/senior manager/proposed client account manager.

Please answer each question fully. The National Coal Mining Museum for England stresses the value and importance of substantiating answers with supporting documentation when requested.

The questionnaire should be completed accurately, if successful this document will form part of the contract.

The response and supporting documents must relate specifically to the tendering organisation's policy and arrangements.

Organisations currently providing services to the National Coal Mining Museum for England must provide full details as requested and not just refer to the National Coal Mining Museum for England.



## **OFFICIAL – SENSITIVE: COMMERCIAL**

Appendices in the form of attachments are either requested for the response to a specific question or can be included in the General Attachment area of this questionnaire but where included must be clearly labelled and cross referenced to ensure the information supplied can be assessed in full.

### **13. Assessment & Feedback**

The tender submissions will be assessed in accordance with selection criteria.

A body of selected individuals will render the decision collectively, the identity of the decision making body will not be shared with parties participating in the tender process. Any conflict of interest must be declared, any conflict not declared may result in the disqualification of the bidding party or in the replacement of the decision maker at the discretion of the National Coal Mining Museum for England.

The National Coal Mining Museum for England will recognise the required standstill period when notifying all bidders of the outcome of the process.

Feedback will be provided at that time to organisations which are not successful through the issue of a letter providing debrief information on the assessment of the tender, scoring, confirmation of the successful tenderer and the characteristics and relative advantages of the successful tender.

## **Appendix A – Whistle Blowing**

### **NATIONAL COAL MINING MUSEUM FOR ENGLANDS WHISTLE BLOWING POLICY**

#### **Public Interest Disclosure Act 1998 (“Pida”) Whistle Blowing Policy**

Should appointed Contractors not have a Whistle Blowing Policy in place they are to ensure that the National Coal Mining Museum for England’s Whistle Blowing Policy and contact details are made available to their employees who will undertake works and services on this Contract.

The National Coal Mining Museum for England’s Whistle Blowing Policy will enable an employee of an appointed Contractor, who may have a concern in respect of this Contract, to have the right to raise the concern and have the concern investigated without fear of reprisal. Anonymity may be preserved at the discretion of the employee. As a first step Contractors or their employees are encouraged to speak to the National Coal Mining Museum for England’s Procurement Officer who will then follow the National Coal Mining Museum for England’s policy for handling such concerns.

Copies of the Whistle Blowing Policy can be made available upon request.

Any written or emailed correspondence relating to whistle blowing should be marked **Strictly Confidential**.

## **Appendix B – Values & Behaviours**

### **Educate**

We aim to advance the public understanding of the history of mining, its impacts historically and currently and demonstrate the legacy mining has left on the nation.

### **Inspire**

We aim to inspire the next generation to learn and engage with historic and contemporary mining, ensuring the heritage and history is not lost but is instead celebrated.

### **Innovate**

We aim to provide opportunities to test and develop innovative solutions and strategies to tackle the problems left over from historic and contemporary mining for the betterment of the environment.

### **Protect**

We aim to safeguard the heritage and legacy left to us, to make best use of the Caphouse and Hope pits through industrial archaeology, exhibitions and education and to ensure a sustainable future for NCMME.

## **Appendix C – Transparency Guidance**

### **Transparency & Accountability**

The Charity Commission takes the view that accountability is a charity's response to the legitimate information needs of its stakeholders. It is important that interested parties can easily obtain relevant and reliable information on a charity's financial position and performance, deployment of resources, organisational structure, policies, priorities, activities and achievements.

A high level of transparency when accounting for performance allows trustees to:

- i. demonstrate that resources are being used wisely and for the stated purpose;
- ii. show that the charity is being organised and managed properly;
- iii. demonstrate that the charity is carrying out its activities efficiently and effectively; and
- iv. attract new resources to enable the charity to continue its activities. The Charity Commission is one of many stakeholders that has a legitimate interest in how charities use their resources, and the Annual Report and Accounts are one of many ways in which charities communicate with their stakeholders. Nevertheless, the Annual Report and Accounts should provide adequate information to allow stakeholders to assess the overall performance of a charity, including sign-posting to where additional details may be obtained.

As a Contractor you agree to provide any information as required by the Charity Commission to further any audit or question they may have regarding financial transparency of the National Coal Mining Museum for England, its projects or site works and any services carried out on their behalf in the completion of this contract.