

# Request for Quotation for Hall For Cornwall Interpretation Plan

Name of Project

Hall For Cornwall  
Interpretation Plan



**HFC**  
**HALL FOR CORNWALL**

## Contents

<b>Basic Contract Information</b>	<b>3</b>
<b>Section 1 – Instructions for Completion</b>	<b>3</b>
1.1 Quote Enquiries	4
1.2 Quote Format	4
1.3 Quote Submission Procedure	4
1.4 Quote Validity Period	4
<b>Section 2 - Quote Timetable</b>	<b>5</b>
<b>Section 3 - Evaluation Approach</b>	<b>5</b>
3.1 Evaluation Criteria	5
3.2 Selection Criteria	7
3.3 Commercial / Price Evaluation	7
3.4 Quality Assessment Evaluation	10
3.5 Award Criteria	10
3.6 Notification of Award	11
<b>Section 4 - Quote Completion Documentation</b>	<b>13</b>
4.1 Selection Criteria	13
4.2 Module 1 - Financial Matters	14
4.3 Module 2 - Health and Safety	14
4.4 Module 3 - Equality and Diversity	14
4.5 Module 4 – Insurances	15
4.6 Module 5 – Mandatory Exclusions	16
4.7 Module 6 – Registration under the Data Protection Act 1998	16
4.8 The Specification	17
4.9 The Pricing Document	24
4.10 The Quality Assessment	26
<b>Schedule 1 - Commercially Sensitive Information</b>	<b>28</b>
<b>Schedule 2 - Form of Quotation and Declarations</b>	<b>29</b>
<b>Schedule 3 - Safeguarding</b>	<b>31</b>
<b>Appendix 1 – Hall For Cornwall Terms and Conditions of Contract for Interpretation Plan</b>	<b>31</b>
<b>Appendix 2 - Defined Terms</b>	<b>31</b>

## PART A - INVITATION TO QUOTE AND INFORMATION FOR APPLICANTS

### Basic Contract Information

<b>Contract Title</b>	Hall For Cornwall Interpretation Plan
<b>Estimated Total Value</b>	Not available
<b>Contract Length</b>	Refer to section 4.8
<b>Basic Description of Services</b>	<p>Hall For Cornwall are inviting suitably experienced heritage interpretation consultants with expertise in developing innovative interpretation to engage wide ranging audiences within sensitive historic environments. The consultants will develop an Interpretation Plan for the Hall For Cornwall.</p> <p>The commission has been separated into two phases, Development and Delivery, and a quote for each phase is required.</p>

PART A INSTRUCTIONS

### Section 1 – Instructions for Completion

This document consists of four parts –

Part A: instructions, timetable and evaluation criteria. There are no sections for the Applicant to fill in in this section.

Part B: must be returned by the Applicant. There are various sub-sections which must be filled in, and those are indicated by a solid blue line around the boxes.

Part C: must be returned by the Applicant. Includes schedules for commercially sensitive information, the form quotation and declarations, Safeguarding and Health and Safety, where applicable. This section also has boxes to fill in, marked with a solid blue outline.

Part D: the Appendices include a glossary. There are no sections for the Applicant to fill out in this section.

Any information relating to HFC and supplied by the HFC shall be kept by the Applicant in strictest confidence.

Applicants are advised that HFC is not bound to accept the lowest quote submitted, nor to reimburse any expense incurred during the process.

### **1.1 Quote Enquiries**

All enquiries and clarifications should be directed to the Authorised Officer shown below and no later than noon 20<sup>th</sup> November 2015:

Siân Woods, Hall For Cornwall

- [SianW@hallforcornwall.org.uk](mailto:SianW@hallforcornwall.org.uk)
- Hall For Cornwall, Back Quay, Truro, TR1 2LL

Applicants are advised that where such enquiries have been made, and it is appropriate to do so, HFC will distribute a full list of clarifications and responses, with anonymity preserved, via an update to the original advertisement of Contracts Finder. Therefore please ensure you check the website for any updates.

### **1.2 Quote Format**

All Quotes must be written in English and costs submitted are to be presented in Pounds Sterling, exclusive of VAT, but inclusive of all other costs where not stated in the Pricing Document.

Where details are provided by the Applicant in literature that they submit in connection with the Quote, they must ensure that clear cross-references are given to HFC.

### **1.3 Quote Submission Procedure**

The Quote must be delivered to: [\[SianW@hallforcornwall.org.uk\]](mailto:SianW@hallforcornwall.org.uk), by no later than 1500 hours on 2<sup>nd</sup> December 2015.

In an e-mail clearly marked with the title of the RFQ. Please note that all electronic submissions must be in Microsoft Word (.doc or .docx file) and compatible with Windows 7. Drawings or charts should be embedded or included as .dwf or .jpg file or in printed document format (.pdf) for use with Adobe Acrobat.

### **1.4 Quote Validity Period**

Quotes must remain valid for acceptance for a period of 60 days from the Quote return date.

## Section 2 - Quote Timetable

This procurement will follow a clear, structured and transparent process at all times, to ensure that all Applicants are treated equally. The key dates for this procurement (Timetable) are currently anticipated to be as follows:

Quote Timetable	
Process	Dates
Issue RFQ	12 November 2015
Deadline for receipt of clarifications ("Deadline")	Noon 20 November 2015
Target date for responses to clarifications	25 November 2015
Deadline for receipt of Tenders	15.00 2 December 2015
Evaluation of Tenders	1 week
Notification of Contract Award decision	w/c 7 December 2015
Target Service commencement date	December 2015
Inception meeting and briefing	December 2015
Draft Report	1 August 2016
Final Report	14 August 2016
End of Contract – Development Phase	31 August 2016
HLF Round 2 Decision	February 2017
Delivery Phase Commencement	March 2017
Delivery Phase End	To be confirmed

## Section 3 - Evaluation Approach

### 3.1 Evaluation Criteria

Bids will be evaluated in two parts:

**Selection Criteria.** These are Module 1 – section 4.2 to Module 6 – section 4.7. Some of these sections may not apply to this RFQ, and a note will be made against any of those which do not apply in this instance.

**Pricing Document and Quality Assessment.** These are Sections 4.9 and 4.10.

The first element HFC will evaluate is the Selection Criteria. Applicants not satisfying the elements of the RFQ will, at the discretion of HFC, be excluded from the remainder of the evaluation process and their bid shall not be considered further.

Applicants who satisfy the Selection Criteria will have the remainder of their bid evaluated in accordance with the remainder of Section 3.

### 3.2 Selection Criteria

The evaluation methodology for the Selection Criteria's modules is as outlined below:

Evaluation Methodology	
Module	Evaluation Methodology
Module 1 – Financial Matters	Not applicable to this RFQ
Module 2 – Health and Safety	Not applicable to this RFQ
Module 3 – Equality and Diversity	Pass/Fail
Module 4 – Insurances	Pass/Fail
Module 5 – Mandatory Exclusions	Pass/Fail
Module 6 – Registration under the Data Protection Act	Pass/Fail

#### Pass / Fail Questions

- These criteria will be scored on a pass / fail basis. In the event of an Applicant being awarded a fail against any of these criteria the Applicant may be excluded from the process and the remainder of the Quote may not be evaluated.

### Consortia, Unincorporated Joint Ventures and Subcontracting Applicants

Where the Applicant has completed the Selection Criteria and that Applicant is made up of a Lead Organisation and Relevant Organisation(s) the following will apply (unless stated otherwise within the relevant section):

- For Pass/Fail modules all Relevant Organisations will be required to pass all modules unless an adequate justification is provided by the Relevant Organisation or the Lead Organisation which is satisfactory to HFC

### 3.3 Commercial / Price Evaluation

The commercial element of the evaluation will be carried out after Applicants have been selected using the Selection Criteria. Only those Applicants satisfying the Selection Criteria's requirements will have their commercial submission evaluated.

The Pricing Document contains the details and requirements relating to the price element of this RFQ. This may include, but is not limited to, the

inclusion of specific instructions, documents, templates, pricing structures, etc. for the Applicants to return as part of their quote submission.

The Applicant's prices will be scored on a comparative basis.

This will be done by recording the lowest price submitted by any of the Applicants, then for each Applicant, dividing the lowest price by the Applicants' price and then multiplying it by the allocated weighting (e.g. 30%. The equation set out below explains this in a simpler way:

$$(\text{Lowest Price} \div \text{Applicant's price}) \times \text{Weighting} = \text{Score}$$

To accompany the above there is a worked example below to help explain this. The example assumes only 2 prices were submitted and that price was awarded 30% of the overall marks (i.e. quality was awarded 70%):

	<b>L</b>	<b>W</b>	<b>Applicant 1</b>		<b>Applicant 2</b>	
Evaluation Elements	Lowest Submitted price (£)	Weighting %	Quoted Price	Score *	Quoted Price	Score **
Total Contract Sum	£65,500	30	£68,000	28.9	£65,500	30
<b>Total Score</b>		<b>30</b>		<b>28.9</b>		<b>30</b>

The example above shows that Applicant 2 scored maximum points because they submitted the lowest Quote price.

\* For Applicant 1, score =  $(65,000/68,000) \times 30 = 28.9$

\*\* For Applicant 2, score =  $(65,500 /65,500) \times 30 = 30$

Where the Total Evaluated Scores of two or more tenderers are identical following the evaluation process identified above and a Tie has occurred the following will be applied to determine the preferred Supplier:

- Where in Section 3.5 the commercial element accounts for 50% or more of the total available score, the highest commercial score awarded to any of the Tied tenderers will be used to select the preferred supplier e.g.
  - o Supplier A 60% Commercial     34% Quality = 94%
  - o Supplier B 54% Commercial     40% Quality = 94%

Supplier A would be deemed the preferred Supplier



- Where the quality element accounts for 51% or more of the total available score, the highest quality score awarded to any of the Tied tenderers will be used to select the preferred supplier e.g.
  - o Supplier A 60% Quality 34% Commercial = 94%
  - o Supplier B 54% Quality 40% Commercial = 94%

Supplier A would be deemed the preferred Supplier

In the eventuality that two or more tenderers remain Tied (e.g. Commercial Score and Quality Score are identical) following the application of the methodology above the preferred supplier will be selected at random from the remaining tenderers using a fair and transparent process. All tied supplier will be entered into a draw and the first supplier to be picked from the draw will be the preferred supplier. In the event of a draw and spirit of fairness and transparency the Tied Tenderers will be invited to send a representative to witness the draw.

### 3.4 Quality Assessment Evaluation

#### Scored Questions

- These modules contain questions relevant to the procurement in question, the responses to which will be evaluated and scored. The module may be assessed and scored as a whole, or each individual question will be evaluated and scored. The sum of those scores will give a total score for that module. Please refer to each module's introduction for full details. Scores will be awarded from 0-5 as defined by the scoring system set out below:
- Tenderers that receive a score of 2 or less in any of these questions/sections shall be excluded from the remainder of the evaluation process and their Tender shall not be considered further, unless HFC, at its absolute discretion, decides otherwise (HFC must evidence why such discretion was exercised).

Scored Questions		
Score	Definition	Interpretation
5	Excellent	<b>Exceptional</b> demonstration of the relevant ability, understanding, experience, skills, resource and/or quality measures required to meet the criteria. <b>Full evidence</b> provided where required to support the response.
4	Good	<b>Above average</b> demonstration of the relevant ability, understanding, experience, skills, resource and/or quality measures required to meet the criteria. <b>Majority of evidence</b> provided to support the response.
3	Acceptable	<b>Demonstration</b> of the relevant ability, understanding, experience, skills, resource and/or quality measures required to meet the criteria, with <b>some evidence</b> to support the response.
2	Minor Reservations	<b>Some minor reservations</b> of the relevant ability, understanding, experience, skills, resource and/or quality measures required to meet the criteria with <b>little or no evidence</b> to support the response.
1	Serious Reservations	<b>Considerable reservations</b> of the relevant ability, understanding, experience, skills, resource and/or quality measures required to meet the criteria, with <b>little or no evidence</b> to support the response.
0	Unacceptable	<b>Does not comply and/or insufficient information provided</b> to demonstrate that there is the ability, understanding, experience, skills, resource and/or quality measures required to meet the criteria, with <b>little or no evidence</b> to support the response.

### 3.5 Award Criteria

The Award Criteria for this RFQ is:

30% Commercial / Price

70% Quality

### **3.6 Notification of Award**

HFC will notify all Applicants of the award decision.

## **PART B – QUOTE RETURN**

Hall For Cornwall

Interpretation Plan

Submitted By

Date

## PART B – QUOTE RETURN

### Section 4 - Quote Completion Documentation

#### 4.1 Selection Criteria

##### Explanatory Notes

Applicants are required to complete all questions in this section which have space for answers. These spaces are marked with a dark blue border. Some sections refer to criteria which are not applicable to this RFQ. This will be clearly marked with "Not Applicable to this RFQ", and you are not required to answer these sections.

All responses provided and associated attachments must be clearly referenced to the questions to which they relate.

All applicable sections of the following Selection Criteria must be completed. Failure to do so may result in your submission being excluded from further evaluation. Where the answer is a statement of fact, it must be accurate and supported by documentary evidence as appropriate. It is the Applicant's responsibility to ensure that HFC is not misled.

It is the responsibility of the Applicant to inform HFC of any matter that may affect the Applicant's continued qualification.

**4.2 Module 1 - Financial Matters**

Not applicable to this RFQ

**4.3 Module 2 - Health and Safety**

Not applicable to this RFQ

**4.4 Module 3 - Equality and Diversity**

NOTE TO APPLICANT: this section will be evaluated on a 'Pass/Fail' basis. For questions 4.4.1 and 4.4.2 answers of 'No' constitute a 'Pass', and any answers of 'Yes' constitute a 'Fail' unless evidence can be provided of appropriate and proportional self-cleaning in question 4.4.3.

The Lead Organisation and the Relevant Organisations must answer all questions in this section.

For organisations working outside of the UK please refer to equivalent legislation in the country that you are located.

4.4.1	In the last three years, has any finding of unlawful discrimination been made against your organisation by an Employment Tribunal, an Employment Appeal Tribunal or any other court (or in comparable proceedings in any jurisdiction other than the UK)?	<input type="checkbox"/> Yes <input type="checkbox"/> No
4.4.2	In the last three years, has your organisation had a complaint upheld following an investigation by the Equality and Human Rights Commission or its predecessors (or a comparable body in any jurisdiction other than the UK), on grounds or alleged unlawful discrimination?	<input type="checkbox"/> Yes <input type="checkbox"/> No
4.4.3	<p>If you have answered "yes" to either 4.4.1 or 4.4.2, please provide below, a summary of the nature of the investigation and an explanation of the outcome of the investigation to date.</p> <p>You are also required to explain what action (if any) you have taken to prevent unlawful discrimination from reoccurring.</p> <p>You may be excluded if you are unable to demonstrate to the Authority's satisfaction that appropriate remedial action has been taken to prevent similar unlawful discrimination reoccurring.</p> <div style="border: 2px solid blue; height: 60px; width: 100%; margin-top: 10px;"></div>	

**4.5 Module 4 – Insurances**

NOTE TO APPLICANT: only the Lead Organisation is required to answer this section. If successful at the end of this quote process then evidence of the declared insurance will need to be provided prior to contract award.

<b>4.5.1</b>	<p>Please self-certify whether you already have, or can commit to obtain, prior to the commencement of the contract, the levels of insurance cover indicated below.</p> <p>If the policy held is in the aggregate, the remaining cover must exceed the minimum requirements shown.</p> <p>Employer's (Compulsory) Liability Insurance = £5m          Public Liability Insurance = £5m          Professional Indemnity Insurance = £1m          Product Liability Insurance = Not required</p>	<input type="checkbox"/> Yes  <input type="checkbox"/> No
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#### 4.6 Module 5 – Mandatory Exclusions

NOTE TO APPLICANT: this section must be completed and will be evaluated as a whole on a Pass or Fail basis. The section will be marked as a 'Fail' if "Excluded" is answered to question 4.6.1 and satisfactory evidence of self-cleaning is not detailed in your response to question 4.6.2.

The Lead Organisation and the Relevant Organisations must answer all questions in this section.

Please be aware that if HFC become aware of an exclusion at a later date, following contract award, your contract may be terminated.

4.6.1	Please confirm whether or not your organisation is excluded from being awarded this contract under Regulation 57 of the Regulations. A copy can be found at the link below:  <a href="https://www.cornwall.gov.uk/media/10781593/exclusion-grounds_internet.pdf">https://www.cornwall.gov.uk/media/10781593/exclusion-grounds_internet.pdf</a>	Excluded / Not Excluded
4.6.2	If the answer to any of the question 4.6.1 above is 'Excluded', please provide full details and the steps you took as a consequence of that finding/investigation below?	

#### 4.7 Module 6 – Registration under the Data Protection Act 1998

NOTE TO APPLICANT: this section must be completed and will be evaluated as a whole on a Pass or Fail basis. An answer of 'Yes' to 4.7.1 constituting a Pass and an answer of 'No' constituting a Fail.

4.7.1	Is your organisation registered with the Information Commissioner's Office under the Data Protection Act 1998? If yes, please provide Registration Number.	Yes / No  Reg No:
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## **4.8 The Specification**

Unless otherwise stated all elements of the Specification are to be considered mandatory requirements and failure to meet these requirements may result in your exclusion from the tender process.

### **1. Context**

Hall For Cornwall are inviting suitably experienced heritage interpretation consultants with expertise in developing innovative interpretation to engage wide ranging audiences within sensitive historic environments. The interpretation consultant will be required to develop an Interpretation Plan for the Hall For Cornwall, which meets the needs of its target audiences.

The Plan is for inclusion in our Round 2 HLF application in October 2016.

The consultants may also be appointed to facilitate the delivery of the Interpretation Plan which will be dependent on successful HLF Round 2 funding.

We require a multi-skilled team who can provide expertise in the development of innovative and engaging digital interpretation, high quality outdoor interpretation and excellent exhibition design. Experience of designing and managing the installation of high quality indoor and outdoor interpretation which has a wide appeal, caters for mixed audiences and includes interactivity is essential. The team should have a strong track record of delivering HLF funded projects.

The appointment is part of a major Heritage Lottery Fund (HLF), Arts Council England (ACE) and European Regional Development Fund (ERDF) funded capital project and the Interpretation Plan is required for the Round 2 capital funding bid to HLF and must be completed by August 2016.

Our project will deliver a major conversion and restoration of the Grade II\* City Hall in the centre of Truro Conservation Area. This site has been at the heart of Cornwall and Truro's political governance, social/entertainment and commercial life since 1809. The current buildings, originally designed by Charles Eales architect in 1847 have housed a market house, City Council Chambers and more recently the Hall For Cornwall theatre.

### **2.The Task**

Hall For Cornwall wishes to develop highly innovative interpretive solutions which maximise the potential of digital technologies and provide exciting and appealing opportunities for a wide range of people to enjoy and learn about the heritage of the Hall For Cornwall, the adjoining Town Council Chambers and the surrounding Conservation Area. The interpretation will provide layers of information, stimulating visitors to want to find out more.

This contract is for the Development Phase and potentially the Delivery Phase of a Heritage Lottery Fund project. The Development Phase will be dependent on successfully securing Round 1 HLF funding, and the Delivery Phase will be dependent on successfully securing Round 2 HLF funding. It is expected that the Interpretation Plan Consultants will have a role in overseeing the installation and realisation of the interpretation materials during the Delivery Phase.

As part of the redevelopment of the Hall For Cornwall the client needs an imaginative, innovative and inspiring Interpretation Plan which will raise the profile of, and engage new audiences with, the heritage of the Hall For Cornwall (previously The City Hall) and its place in the social and economic life of Truro. The plan will address the development of:

- New exhibitions and digital displays in the Hall For Cornwall and the adjoining Truro City Council Chambers which will explore the building's heritage.
- Interpretation materials to support a new programme of volunteer-led guided tours of Truro's Conservation Area linking its landmark buildings, Hall For Cornwall, the Council Chambers, Truro Cathedral and Royal Cornwall Museum.
- New digital interpretation of the heritage of the area via a new smart phone app.
- New website providing more opportunities for people to learn about the heritage and opportunities for co-production which will increase engagement of under-represented audiences.
- Support and feed into the creation of new signage and branding of the Hall For Cornwall which will be empathetic to its heritage.

The role of the Consultant will be to work with Hall For Cornwall and their consultants to assimilate all of the required information, undertake detailed and informed analysis, and produce an Interpretation Plan of the highest quality that meets the needs of the targeted audiences, and which delivers the project's specified outcomes and meets the specific requirements of the HLF.

An Interpretation and Activity Planning Group, consisting of key Hall For Cornwall staff, will be established to support the work of the consultants and provide on-going feedback. The Interpretation Plan consultants will also be required to report regularly to the Capital Working Group (CWG) which has the overview of the project and to which all the project consultants will report.

The Interpretation Plan consultants will also be supported by the Project Co-ordinator, who will help with internal and external communications, ensure that there is good communications with other consultants and support the practicalities of consultation with the general public.

The outcomes of the project must meet the needs of these audiences:

- Children, families and young people
- School children and teachers

- College and university students
- People with disabilities and those at risk of discrimination, disadvantage and isolation
- Cornish identifiers
- Older people
- Volunteers
- Local community
- Business community in Truro
- Tourism and cultural sector staff
- Creative businesses working in the building's creative hub and café spaces
- Tourists
- Key Cornwall story-holders
- Young Farmers

The project will also have significant benefit for current and new volunteers who will be actively engaged in developing and delivering the project.

The commission will require the development of an overall Interpretation Plan which will inform the approach to interpretation and exhibition design in each of these areas:

- Hall For Cornwall
- Truro City Council Chambers and associated offices
- Truro Conservation Area

Key elements of interpretation to be developed include:

- digital displays
- a web site
- exhibition panels
- signage
- a digital trail "app"
- other interpretation developed through this study

The appointed consultants will need to undertake a process of consultation during the development of designs in order to ensure that they respond to the needs of target audiences. We also expect that the appointed designers will work closely with other members of the project team such as the Project Co-ordinator, the Conservation Management Consultant and the Design Team (led by architects Burrell, Foley and Fischer) and Hall For Cornwall staff. In particular they will need to work closely with the appointed Activity Planners to ensure a holistic approach to the development of learning and interpretation.

It is expected that the Interpretation Plan will enhance the experience of visiting the Hall For Cornwall and the surrounding area through guiding our investment in new interpretation which may include:

- 1) New permanent and temporary exhibitions and digital displays in the Hall For Cornwall, Truro City Council Chambers and the immediate

historic environs of Lemon Quay and Boscawen Street (Expected cost of realisation £54,000)

- 2) A new smart phone app and digital interpretation helping visitors to explore the links between the Hall For Cornwall, Royal Cornwall Museum and Truro Cathedral (maximising opportunities for personalised learning and links with the wider heritage of the city) (Expected cost of realisation £18,000)
- 3) A website which contains a variety of information and activities for schools and other groups and interested individuals. (Expected cost of realisation £20,000 for website design and 3 years maintenance)
- 4) Projects run as part of the Activity Plan, with target groups to develop content for digital displays and website. (£36,000 for content production over three years)
- 5) New signage and wayfaring inside and outside of the building (Expected costs of realisation £20,000 for signage)
- 6) Heritage interpretation integrated into the building's stonework. Light touch interpretation integrated into Hall For Cornwall communications such as programmes, advertising, menus etc. (Expected costs of realisation £10,000 for stonemason fees)
- 7) The Interpretation Plan will support and inform an exciting programme of activities, which will be developed in our project's Activity Plan and will include:
  - An outreach programme involving disadvantaged and marginalised communities.
  - A training programme for staff, volunteering and tourism sector partners.
  - Recruitment/retraining 100 volunteers and create a number of new volunteering roles including tour guides, researchers, digital developers, and interpretation assistants.

The work to be carried out by the Interpretation Plan consultants will comprise the following key activities, all of which must be evidenced:

- Undertake a review of themes and stories related to the Hall For Cornwall to fully understand the heritage.
- Liaise with the design team to identify suitable sites for interpretative material and digital displays and to understand building/site constraints and visitor flows.
- Review audience intelligence and Activity Plan consultation and national research to identify how visitors learn from and interact with the heritage of buildings and apply this to the Hall For Cornwall.
- Ensure ongoing consultation and liaison with key members of the Project Team to ensure that all interpretation proposals meet the strategic priorities of Hall For Cornwall.

- Work closely with the Activity Plan consultant to ensure that all aspects of the Heritage Strategy support and inform their work.
- Review resources available (and resources required) to ensure effective management, operation and maintenance of new interpretation.
- Produce a comprehensive Interpretation Plan to match heritage themes and stories and identifying learning objectives matched to target audiences.
- Test outline plans and visuals for interpretation with potential user groups ensuring opportunities for co-production.
- Develop a design strategy for signage inside and outside of the building which reflects the building's heritage.
- Produce high quality, innovative and sustainable solutions which maximise the use of digital technologies and sustainable materials.
- Liaise with marketing department and catering department to develop a strategy for communicating heritage, in a light touch manner, through existing media – e.g. programmes, menus, etc.
- Advise and outline the optimum procurement option for the Interpretation during the delivery stage and develop associated briefs.
- Liaise closely with Architect-led Design Team on the provision of infrastructure.
- Liaise closely with the Project Co-ordinator and the Project Team as they develop the consultation and engagement strategy and activity.
- Produce all required information for the Round 2 report to HLF, including concept designs for interpretation and 'content hierarchy'.

### **3. *Project Governance***

Hall For Cornwall has established a robust project management system and a clear set of governance procedures to oversee the project.

The Board of Trustees has ultimate responsibility for this capital development ensuring that the project is properly managed, risks are mitigated and that the funders' investment is correctly used. The Board of Trustees receives progress reports from the Executive subcommittee and from the Director, who is the Project Champion.

A Capital Working Group (CWG) has been set up to oversee the progress of the project, receiving inputs from project consultants and professional advisors from Cornwall Council. The working group comprises of:

Hall For Cornwall

- Julien Boast (Director)
- Sara Dauncey (Head of Finance)
- Project Coordinator (to be appointed)

Cornwall Council

- Julie Seyler (Culture Programme Manager)
- Tamsin Daniel (Culture Programme Officer)
- Len Smith (Strategic Programme Manager)

- Jordan Whaley (Strategic Programme Officer)

Project Manager

- James Wickett (SWEETT Group) - Chair

The key client contact throughout the procurement process should be Siân Woods, Hall For Cornwall, and the contact for the duration of the contract will be the Project Co-ordinator (to be appointed).

#### **4. Outputs**

The consultant will deliver an Interpretation Plan for the project addressing all issues identified in the HLF guidance.

<http://www.hlf.org.uk/interpretation-guidance>

The final study outputs should include a written summary of all consultation, a summary of key themes and stories, key objects and groups of collections and of learning objectives matched to target audiences. The report should include exhibition plans, visuals, running elevations and specification together with detailed costing to demonstrate cost certainty to RIBA Stage 3 equivalent. All of the final outputs must be in line with the requirements for an HLF Round 2 submission.

Consultants will be required to provide the following, in full accordance with HLF guidelines for interpretation:

1. An Interpretation Plan for the Hall For Cornwall, the Truro City Council Chambers and for tours and trails of the Truro Conservation Area which details an innovative and engaging approach to site-wide interpretation of the heritage of the Hall For Cornwall building and its place within the development of Truro
2. Designs to (to RIBA stage 3 or equivalent where relevant) for new interpretation in the Hall For Cornwall and Truro City Council Chambers – with a focus on use of the latest digital technologies
3. Specifications for a heritage website for the Hall For Cornwall and the surrounding area, and a brief for its development
4. An outline of the key elements of an “app” for mobile phones
5. Work with the appointed Architect led team to develop a specification for signage for the building including external signage linked to a brand design identity for the whole building. A brief will be required to commission all appropriate work.

A draft Interpretation Plan will be completed and submitted to the client for consideration prior to the final Interpretation Plan. Completed sections of the Plan will also be submitted for feedback as and when appropriate.

The consultant will be required to attend meetings as deemed appropriate by the client. Please price for attendance at two meetings and any additional meetings attended (agreed with the client) will be reimbursed at cost.

The consultant will make arrangements for the final publication of the Interpretation Plan, and will provide to the client:

- 4x bound colour copies of the main text and appendices in A4 format illustrated as appropriate
- An electronic copy of the full report in PDF format and Microsoft Word on CD

## **5. Copyright**

Hall For Cornwall will own the copyright of the final version of the report and all other supporting documentation and project material.

The consultant should clear the copyright for any illustrations or other material used in both documents.

## **6. Timescales**

The appointment will commence in the HLF Development Phase starting in December 2015 and finishing in August 2016 in order to inform the business plan for an application for HLF Round 2 funding in October 2016.

Please note that the start date is reliant on a successful application to Heritage Lottery Fund being secured in November 2015 and contracting being completed in December 2015.

The Delivery Phase will commence, if successful, most likely from February 2017 following submission of the HLF Round 2 application in November 2016.

## **7. Submission of Bids**

Your tender submission will respond to the questions in 4.10 and include the following:

- Company Information to include; organisation name and address, phone and email contacts and web site details.
- Proposed methodology to address the brief and achieve the required outputs.
- Clarification on how the team will work to ensure that the Interpretation Plan and design work is fully co-ordinated with the preparation of architectural designs and the business plan in readiness for the HLF Round 2 application.
- How the involvement of the Interpretation Plan Consultants will be managed to ensure proper liaison with the Project Team.
- How the Interpretation Plan Consultants will ensure co-ordination with Architect-led Design Team.

- A summary of your approach to design, brief development, collaborative working and working with stakeholders, highlighting two or three relevant examples
- Details of previous experience, and evidence of up to date knowledge and expertise, in the preparation and carrying out of Interpretation Plan and Interpretation Designs for arts/cultural/museum capital projects, preferably relating to listed buildings
- A detailed cost breakdown relating to the two phases including day rates for all members of the team and all travel and other disbursement costs.
- Risk management for delivery of brief to include the submission of a Risk Register and identified mitigation strategy
- Details of the proposed team structure including CVs of key members of the team and their respective time commitment to the project.
- Details of any sub-contractors you intend to use, highlighting their relevant experience, the proposed portion of work you will be sub-contracting out, the costs associated with this work and how you intend to manage them.
- Any additional services or specialist advice considered necessary or advisable to carry out the commission.
- Exclusions to the Fee Offer to be clearly identified.
- Please also demonstrate the team's ability to resource and deliver the work on time.
- A preliminary programme detailing consultant tasks & key milestones.
- Fee drawdown on monthly basis.
- Please provide details of last three years' accounts of your organisation and, if applicable, the parent company.
- Evidence of Employers Liability (£5m), Public Liability (£5m) and Professional Indemnity (£1m) or confirmation that the insurances will be in place should you be successful.

Consultants should ensure that they properly account for all aspects within the scope of the work and make clear in the tender submission the time allocation and staff resources to be allocated for each task.

## **9. *Invoicing Arrangements***

Invoicing arrangements and payment terms will be agreed with HFC prior to contract.

## **10. *Terms and Conditions***

In the event that we decide to move forward with your company an order shall be placed with you subject to Hall For Cornwall's Standard Terms and Conditions of Purchase of Goods and Services a copy of which will be sent to you on request.

## **4.9 The Pricing Document**

Please provide a fee quotation for the Development Phase for the HLF Round 2 submission and separately for the Delivery Phase.



There is a budget of £15,000 to complete the Development Phase and a budget of £11,000 for the Delivery Phase.

There will be a separate budget for the fabrication, printing, production and installation, which is excluded from this tender. The appointed consultant is expected to identify what is required and the cost.

**Please note that the Development Phase will not commence unless the HLF Round 1 submission is successful.**

There will be a break clause at the end of the Development Phase. Continuation will be determined based on your performance during the Development Phase and dependent on securing Delivery Phase funding from HLF.

Provide a fixed price fee for your professional fees, broken down into the Development Phase and Delivery Phase, and include: the names of the key people for each stage and their roles, the number of days from each person and the individual day rates. Price to include all fees and disbursements, excluding VAT.

Please complete the following tables, adapting the 'Description' column to identify the team that you are presenting, or insert your own table providing you include all the relevant information to help us assess both the price and the resource that you are offering.

Description <i>e.g. 'Jo Blogs, Project Lead'</i>	Rate / Day	<u>Development Phase</u>	
		Days	Cost
<b>Sub-total</b>			

Description <i>e.g. 'Jo Blogs, Project Lead'</i>	Rate / Day	<u>Delivery Phase</u>	
		Days	Cost

<b>Sub-total</b>			
<b>TOTAL commercial price [exclusive of VAT]</b>			

#### 4.10 The Quality Assessment

Tenderers that receive a score of 2 or less in any of these questions/sections shall be excluded from the remainder of the evaluation process and their Tender shall not be considered further, unless HFC, at its absolute discretion, decides otherwise (HFC must evidence why such discretion was exercised).

Hall For Cornwall is seeking suitably experienced heritage learning specialists who can demonstrate the following qualities:

- High design standards and an ability to respond sensitively to the challenges of the project, the conditions of the site, and the core values and aspirations of HFC.
- Evidence of accurate and ambitious project development and an ability to work with diverse client bodies.
- The strength of the design team and their approach to sustainability.
- Experience of designing and delivering similar successful projects, particularly within the arts and culture sector but not necessarily, involving listed buildings and in sensitive historic settings.
- The team should also be able to provide suitable evidence of appropriate indemnity and public liability insurance, health and safety and quality assurance and financial standing.

<b>4.10.1</b>  <b>25%</b>  <b>(weighted score 17.5%)</b>	<b>Identify and briefly describe three projects from which you consider the skills demonstrated to be transferable to this one; provide website links to these projects (where they exist) and if possible, provide 3 references from the clients. Please only provide examples from the last 5 years.</b>  <b>How would you apply this experience to HFC?</b>  <b>[maximum one (1) side A4 per project]</b>

<p><b>4.10.2</b></p> <p><b>15%</b></p> <p><b>(weighted score 10.5%)</b></p>	<p><b>Outline your approach and methodology for the development and delivery of the Interpretation Plan, including identification of key risks and how you would mitigate against them.</b></p> <p><b>[maximum two (2) sides A4]</b></p>
<p><b>4.10.3</b></p> <p><b>10%</b></p> <p><b>(weighted score 7%)</b></p>	<p><b>Provide a programme incorporating the known dates identified in this document and including the break between Development and Delivery Phases. Demonstrate that you can delivery on time.</b></p>
<p><b>4.10.4</b></p> <p><b>15%</b></p> <p><b>(weighted score 10.5%)</b></p>	<p><b>Outline your experience of working with trusts or other community groups similar to HFC, and what experience you have of creating exhibitions that have been informed by consultation with different audiences. How will you apply this experience to the project?</b></p> <p><b>[maximum two (2) sides A4]</b></p>
<p><b>4.10.5</b></p> <p><b>15%</b></p> <p><b>(weighted score 10.5%)</b></p>	<p><b>Describe how you would approach the project management of the exhibition and design to facilitate collaboration and coordination, together with the reporting thereof.</b></p> <p><b>[maximum two (2) sides A4]</b></p>
<p><b>4.10.6</b></p> <p><b>20%</b></p> <p><b>(weighted score 14%)</b></p>	<p><b>Demonstrate your ability to resource the scheme with appropriately experienced and qualified staff, and your ability to deliver the commission on budget. Include CVs for each member of your team.</b></p> <p><b>[maximum one (1) side A4 per CV]</b></p>

## Part C - SCHEDULES

### Schedule 1 - Commercially Sensitive Information

We may be obliged to disclose information in, or relating to, this RFQ following a request for information under the Freedom of Information Act (FOIA) or Environmental Information Regulations (EIR). Please outline in the table below items which you consider are confidential and genuinely commercially sensitive and which should not be disclosed in respect of your RFQ.

Information / Document	Reference / Page No.	Reasons for Non-Disclosure (cite exemption(s) to be considered)	Duration of confidentiality

Notwithstanding the above, we acknowledge we may still be obliged to disclose the Commercially Sensitive Information listed in this Schedule, in accordance with the RFQ pursuant to a request under the FOIA or EIR. Without prejudice to obligation to disclose information in accordance with the FOIA or EIR we shall act reasonably, at its absolute discretion and notwithstanding any other provision in this RFQ or otherwise, seek to apply the commercial interests exemption to the information/documents listed in this Schedule.

This schedule will be kept with the RFQ documents for consideration should a request for information under the FOIA or EIR be received. This document will be destroyed in line with the retention and destruction policy.

## Schedule 2 - Form of Quotation and Declarations

Development Phase Contract Period December 2015 to 31/08/2016

### Invitation to Quote Which Does Not Include a Formal Deed of Agreement

Having examined the Invitation to Quote and its accompanying documents (which I/we shall keep) and being satisfied as to my/our abilities and experience in all respects to satisfy the requirements of the Contract.

I /we	
Name of person applying on behalf of organisation	
Title / position of person applying on behalf of	
Contact telephone	
Contact e-mail	
Name of organisation	
Address and post code	
Registered office if different from above	
Organisation VAT registration number	
Registered Company Number (Where Applicable)	
Does the organisation employ less than 250 persons and have an annual turnover less than €50 million / £35 million?	Yes/No

Offer to provide or supply upon the terms and conditions of the contract contained in Appendix 1 in its present form the Services for the prices on the quoted Pricing Document as indicated below for the contract period: -

Fixed contract price of	£
£ price excluding VAT per annum	£
Pricing Document attached	YES / NO

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and/or during the contract period at the price ascertained under the terms and conditions of contract.

I/We understand and agree that your written letter of acceptance of our Quote shall constitute the making of a binding contract between us.

I/We understand that the information provided in this quotation document and any supporting information provided by us will be relied upon and taken to be true and accurate. If it is subsequently determined that any information supplied was inaccurate, I/we understand and accept that HFC reserves the right to exclude our offer to supply (if still under evaluation) or if the Contract has been awarded and the information inaccurately supplied had a significant bearing on the award, that HFC shall be at liberty to terminate the Contract.

I/We understand that you are not bound to accept the lowest or any Quote you may receive.

Signed	
Signed (1)	
Status	
Signed (2)	
Status	
For and on behalf of	
Date	

### **Schedule 3 - Safeguarding**

Not applicable to this RFQ

## **PART D - APPENDICES**

### **Appendix 1 – Hall For Cornwall Terms and Conditions of Contract for Interpretation Plan**

To be provided

## Appendix 2 - Defined Terms

For the purpose of this Quotation the following words and expressions shall have the meanings set out below.	
<b>Appendix</b>	The referred Appendix attached to, or supplied with, this RFQ.
<b>Applicant</b>	Any person or persons, firm or firms, company or companies bidding for the Services detailed in this RFQ, or, where there is more than one organisation applying, the lead organisation.
<b>Authorised Officer</b>	The person(s) detailed in 1.1 of this RFQ.
<b>Award Criteria</b>	The evaluation criteria that will be applied to all bids satisfying the Selection Criteria (if applicable).
<b>Contract</b>	The Contract for the provision of the Services, which will be awarded to the successful Applicant.
<b>Lead Organisation</b>	In the case of a consortium Applicant or an Applicant relying on Significant Subcontractors, the organisation responsible for leading the submission.
<b>Quality Assessment/Evaluation</b>	The quality element of an Applicant's bid and/or the evaluation relating to that quality aspect.
<b>Relevant Organisation</b>	(a) where the Applicant is a consortium, each consortium member other than the Lead Organisation; and (b) where the Applicant or consortium member is a prime contractor, each Significant Subcontractor other than the Lead Organisation.
<b>RFQ</b>	This Request for Quotation documentation for Hall For Cornwall Interpretation Plan.
<b>Selection Criteria</b>	The criteria used to select those Applicants whose bids will be considered for evaluation against the Award Criteria.
<b>Significant Subcontractor</b>	Where there is a subcontracting arrangement, each proposed subcontractor where that proposed subcontractor will be contributing significantly, either in terms of value or importance to the performance of the Works.
<b>Services</b>	The Service or Services as described in this RFQ.