

Project Manager & Quantity Surveyor

Period of contract: Development and Delivery Phase - RIBA 2 to RIBA 7.

April 2025 - May 2026; August 2026 – May 2028



**Invitation to Tender (ITT)
for
St Osyth Priory & Parish Trust –
Project Management & Quantity Surveyor**

Submission of Tenders: 28th March 2025

Any queries relating to this tender should be submitted via the
St Osyth Priory & Parish Trust email - tenders@prioryeducationcentre.co.uk

Issue date: 28th Feb.



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1.0 THE PROGRAMME

1.1 INTRODUCTION

St Osyth Priory & Parish Trust is currently in the development phase of a Round 1 application to the National Lottery Heritage Fund (NLHF) which will focus on the redevelopment of the Tithe Barn and Old Dairy and into hireable event and community spaces.

St Osyth Priory & Parish Trust wishes to appoint a suitably qualified and highly experienced Project Manager and Quantity Surveyor to work on the Development and Delivery Phases - RIBA 2 to RIBA 7 of this aspect of the project.

This ITT sets out the background to the project, the tender process, timescales and management arrangements.

There is, however, no guarantee that Delivery Phase services will be required, and bidders should take account of this.

1.2 BACKGROUND INFORMATION

St. Osyth Abbey (originally and still commonly known as St. Osyth Priory) was a house of Augustinian canons in the parish of St. Osyth (then named Chich) in Essex, England in use from the 12th to 16th centuries. Prior to the Reformation, it was the third wealthiest abbey in the country. After falling into private ownership by the Darcy family following the reformation, the abbey was severely damaged in the English Civil War, and the house and 6,800-acre estate was owned privately throughout its history.

The house was requisitioned during the Second World War and then sold in 1948 to the Loyal and Ancient Order of Shepherds who founded a convalescent home here. Five parts of the priory are Grade I listed buildings. In 1954 Mr Somerset de Chair, a popular novelist and MP, purchased the property, allowing the convalescent home to remain in the main building for many years (closed 1980), and converting the Gatehouse into a separate residence. De Chair developed the gardens and opened the property to the public. He also gradually sold off parts of the estate and allowed large scale gravel extraction to disfigure much of the surrounding landscape. After his marriage in 1974 to Lady Juliet Wentworth Fitzwilliam, the Wentworth Woodhouse art collection, which she had inherited, was displayed here. On de Chair's death in 1995 the property was put up for sale by his widow, and it was eventually purchased by the present owners, the Sargeant family, in 1999. It is part of the Historic Houses Association but is privately owned by the Sargeant family.

The site is used for events, open for walking tours, and there is an education and training centre.

St. Osyth Priory is an exceptional collection of heritage assets comprising 16 separate Grade I, II* and II listed buildings set within a Grade II registered historic park and garden. The vision for this mesmerising collection of buildings and landscape, is to fully revitalise and restore the historic assets to their former glory. By utilising many different options, the estate will have a new long term and viable future that engages with the community and brings new

economic prosperity to the local area. The vision is that the Tithe Barn and Old Dairy buildings will deliver a wedding and events venue that can be leased and potentially run by a private operator - with the buildings used by the community to meet the Trusts charitable purposes when not rented out commercially.

1.3 PROGRAMME TIMELINE

Below is an approximate timeline of the programme:

RIBA Stage 2 – June 2025 to January 2026

1. Estimated NLHF Mid-Stage Development Review – February 2026
2. Pre-planning Application Submitted – November 2025
3. Ongoing SOPPT Meetings

RIBA Stage 3 – February 2026 to September 2026

1. Scheme Designs Approved – February 2026
2. Match Funding for Delivery Phased secured and in place, agreements in place - April 2026 to July 2026
3. Round 2 Application Prepared – April 2026 to August 2026
4. Round 2 Application Submitted - August 2026
5. Ongoing SOPPT Meetings

End of Development Phase

RIBA Stage 4 – August 2026 to March 2027

1. Planning/LBC applications – August 2026 to November 2026
2. Decision on Round 2 Application – December 2026
3. Building Regulations Full Plans Application – January to March 2027
4. Estimated Permission to Start Received (Round 2) – January 2027
5. Discharge Pre-Commencement Planning/LBC conditions – February 2027 to March 2027
6. Ongoing SOPPT Meetings

RIBA Stage 5 – April 2027 to April 2028

1. Construction - May 2027 to December 2027
2. Fit out and interpretation installation period – January 2028 to March 2028
3. Fit out and interpretation installation complete – March 2028
4. Ongoing SOPPT Meetings

RIBA Stage 6 Handover of sites & testing for close out – April 2028 to June 2028

1. Ongoing SOPPT Meetings

RIBA Stage 7 In use and open for Autumn - July 2028 to March 2029

1. Ongoing SOPPT Meetings
2. Project Evaluation Submitted - November 2028 to March 2029
3. Activity period and programme ends – March 2029

2.0 REQUIRED SERVICES

2.1 PROJECT MANAGER

The Project Manager will be required to work with the immediate Project Team, including the Quantity Surveyor, Multi-Disciplinary Design Team and all other consultants towards the development and successful completion of the NLHF Round 2 application in August 2026. This will involve procurement and ensuring that all team members are delivering against the terms of their contracts and are providing work of a quality that meets NLHF and St Osyth Priory & Parish Trust's expectations and requirements. The Project Manager will be a key post in ensuring that the vision and ambition of the project are realised in a timely, efficient, and cost-effective manner, and that all of the elements of the application are interwoven and developed in tandem. It will be the responsibility of the Project Manager to deliver the following elements of work:

To manage the appointed design team and their outputs, which includes:

- Commercial and cost consultant(s)
- Architectural and Engineering consultants
- Activity, Interpretation and Business Planning consultants

Procure and manage any additional professional surveys or services required to inform the NLHF Stage 2 application.

Provide risk management for the project, and escalate issues as required.

To be responsible for the overall management of the development phase programme and project budgets and their monitoring.

To be responsible for the overall management of the delivery phase programme and project costs and their monitoring.

To keep full and proper records of all meetings and negotiations conducted in connection with this work.

To keep the Trust and other key stakeholders, including the NLHF, advised of progress, issues, and overall project development.

Organise Steering Group Meetings and produce information to consult with and inform the Steering Group of projects progress.

To collaborate closely with stakeholders, the Project Board, and staff at the NLHF and attend all application advice workshops as necessary.

To prepare the NLHF Round 2 Application with the support of the immediate project team, Trust board, staff, and other consultants, including NLHF advisors.

Any other items appropriate to the position and grade.

2.1.1 Development Phase

Expected services include:

RIBA Work Stage 2 to 3

- Consultant appointments
- Brief, design and quality control.
- Reporting and meetings (pre-contract)
- Programming
- Capital budgeting.
- Construction economics and fiscal management
- Local authority and planning approvals
- Preparation and submission of Planning Application
- Development of Consultation plan (in collaboration with local communities and stakeholders to share knowledge and develop the project objectives)

2.1.2 Delivery Phase

Expected services include:

RIBA Work Stages 4 to 7

- Contract procedures
- Reporting and meetings (post contract)
- Construction economics and fiscal management
- Cash Flow
- Contract Management
- Discharge of any planning conditions (alongside Lead Designer)

2.2 QUANTITY SURVEYOR

The Quantity Surveyor will collaborate with the Project Manager/Lead Consultant to develop and complete the NLHF Round 2 application. The Quantity Surveyor will collaborate with the client team and other consultants to detail the costings for alterations to the current buildings and any new structures, the interiors, service installations and areas of hard and soft landscaping.

The Quantity Surveyor will work with the Lead Consultant and client team in preparation for a second-round application to the NLHF to deliver the capital works phase of this project. This will include managing a contractor's tender process (RIBA Stage 4) before submission of the Round 2 application in August 2026.

It will be the responsibility of the Quantity Surveying Consultant to deliver the following elements of work:

- The development phase cost plan will include the completion of RIBA Work Stages 2 to 4 to enable a full second round application to be submitted to the NLHF together with a preferred contractor ready to go onto site as soon as the Round 2 submission is successful and delivery phase Permission to Start is achieved.
- The delivery phase cost plan will include the completion of RIBA Work Stages 5 to 7 and is dependent on achieving a successful second round NLHF Heritage Enterprise Grant

award, combined with securing sufficient funding to enable the capital works project to go ahead.

- Input into liaison with all the stakeholders and consultation both with the client group and the public.
- Production documentation of cost reports and specifications.

2.2.1 Development Phase

Expected services include:

RIBA Work Stage 2 to 3

- Cost Planning
- Construction Tender Action Plan and Assessment with Project Manager

2.2.2 Delivery Phase

The following services are anticipated:

RIBA Stages 4 to 7

- Cost management and reporting
- Value Engineering
- Contractor's cost management liaison

3.0 INSTRUCTIONS FOR TENDERING

3.1 General Tendering Information

3.1.1 These guidelines have been established to guarantee that all Tenderers receive equal and impartial consideration. It is important therefore that you provide all information asked for in the format and order specified in the tender documents. If you have questions or need assistance, please email tenders@prioryeducationcentre.co.uk.

3.1.2 St Osyth Priory & Parish Trust reserves the right to contact and accept references. Tenderers must provide three references for similar work in their ITT submission.

Tenders must comply with these guidelines.

3.1.3 Tenders that do not comply with any mandatory requirement (i.e. where the words “shall” or “must” are used) will be rejected.

3.1.4 This ITT does not constitute an offer and St Osyth Priory & Parish Trust does not undertake to accept any tender. St Osyth Priory & Parish Trust reserves the right to accept a Tender in part, rather than in full.

3.1.5 Whilst the information contained in this ITT is believed to be correct at the time of issue neither St Osyth Priory & Parish Trust, nor its advisors, will accept any liability for its

accuracy, adequacy or completeness nor will any express or implied warranty be given. This exclusion extends to liability in relation to any statement, opinion or conclusion contained in or any omission from this ITT (including its appendices) and in respect of any other written or oral communication transmitted (or otherwise available) to any Tenderer. This exclusion does not extend to any fraudulent misrepresentation made by or on behalf of St Osyth Priory & Parish Trust.

3.2 Confidential Nature of Tender Documentation

3.2.1 Documentation in relation to this Invitation to Tender and any Tenders received by St Osyth Priory & Parish Trust in response to it shall be treated as a private and confidential save where the disclosure is required by law.

3.2.2 Other than with professional advisers or sub-contractors that need to be consulted with regards to the preparation of the Tender, Tenderers shall not:

- a) Disclose that they have been invited to tender.
- b) Discuss the Invitation or the Tender they intend to make.
- c) Release any information relating to the ITT and/or the Tender that they intend to make.
- d) Devise or amend the content of their Tender in accordance with any agreement or arrangement with any other organisation and/or person, other than in good faith with an organisation and/or person who is a proposed partner, supplier, consortium member or provider of finance.
- e) Enter into any agreement or arrangement with any other organisation and/or person, other than in good faith with an organisation and/or person who is a proposed partner, supplier, consortium member, or provider of finance.
- f) Enter into any agreement or arrangement with any other organisation and/or person that has the effect of prohibiting or excluding that person from submitting a Tender.
- g) Canvas directly or indirectly with any other Tenderer, Member or Officer of St Osyth Priory & Parish Trust (including its consultants and contractors) in relation to this procurement.
- h) Attempt to obtain information from any of the employees or agents of St Osyth Priory & Parish Trust or their advisors concerning another Tenderer or Tender.
- i) Pass the ITT documents to any other organisation.

3.2.3 If a Tenderer does not observe the points above, St Osyth Priory & Parish Trust will reject their tender and may decide not to invite the Tenderer to tender for future work.

3.2.4 St Osyth Priory & Parish Trust will consider only bona fide bids, which do not refer to any other bid. It shall be entitled to disqualify any application where collusive bidding is suspected.

3.3 Conditions

3.3.1 St Osyth Priory & Parish Trust is not liable by way of contract, for any work undertaken or cost incurred by any respondent in connection with the preparation, submission or assessment of any tender. The Tenderer is responsible for independently checking and satisfying themselves of the accuracy of the information provided in this brief.

3.3.2 St Osyth Priory & Parish Trust reserves the right to retain all submission material, including that prepared for presentation purposes, and display or otherwise utilise the material as it may consider appropriate, at no cost to them.

3.3.3 Subject to satisfactory performance and funding being secured for the Delivery Phase, the Project Management and Cost Consultant team will also be commissioned through this tender to manage the implementation of all landscape and building works in the Delivery Phase. **There is, however, no guarantee that delivery stage services will be required, and bidders should take account of this.**

3.4 Communication and Questions

3.4.1 All formal communications (including, but not limited to, clarification questions, appointments for site visits and the submission of Tenders) to St Osyth Priory & Parish Trust are to be made in writing using tenders@prioryeducationcentre.co.uk

3.4.2 It is the Tenderer's responsibility to ensure any verbal queries or clarifications they generate are confirmed in writing via email. In the event of any misunderstandings reliance on verbal communications will not be permissible.

3.4.3 If a Tenderer is in doubt as to the interpretation of any part of the ITT, or if they consider that any of its requirements are ambiguous or conflict with any other requirements, they should contact St Osyth Priory & Parish Trust via email.

3.4.4 No representation, explanation or statement made to the Tenderer or anyone else by or on behalf, or purportedly on behalf of St Osyth Priory & Parish Trust as to the meaning of the Tender documents, or otherwise in explanation as aforesaid, shall be binding on St Osyth Priory & Parish Trust in the exercise of its obligations under a subsequently awarded contract.

3.4.5 Should any Tenderer wish to clarify the interpretation of any part of the ITT requirements, they may submit clarification questions via email system. This opportunity exists until the deadline of 14th March 2025 after which no undertaking is given to reply. St Osyth Priory & Parish Trust will use their best endeavours to respond as a matter of assistance to the Tenderer, but it shall not be construed to add to, modify or take away from the meaning and intent of the proposed contract and/or the obligations and liabilities of the Tenderer. Tenderers' messages are managed in standard business hours only, Monday to Friday.

3.4.6 Where an enquiry is beneficial to all Tenderers, both an anonymised copy of the clarification question and the response will be communicated to all Tenderers. If a Tenderer wishes St Osyth Priory & Parish Trust to treat a clarification as confidential and not issue a

response to all Tenderers it must state this when submitting the clarification question. If, in the opinion of St Osyth Priory & Parish Trust, the clarification is not confidential, St Osyth Priory & Parish Trust will inform the Tenderer, and the Tenderer will have an opportunity to withdraw it. If the clarification is not withdrawn, both the question and response will be sent to other Tenderers anonymously.

3.4.7 St Osyth Priory & Parish Trust reserves the right (but shall not be obliged) to seek clarification of any aspect of a Tender during the evaluation phase where necessary for the purposes of carrying out a fair evaluation. Tenderers are asked to respond to such requests promptly.

3.5 Evaluation Criteria

3.5.1 The final contract award will be to the Most Economically Advantageous Tender. The tender evaluation criteria will be based on a combination of Quality and Price which has been specified and weighted in the table below.

3.5.2 Once all evaluations have been completed St Osyth Priory & Parish Trust will add the quality and price scores together to provide a total score for each Tenderer. The Tenderer with the highest total score will be recommended to deliver the service.

Criteria		Weighting
Quality - 70%		
	Key Project Personnel	
	Project Execution	
Price - 30%		
	Cost Proposals	

3.6 Tender Contents and Scoring Methodology

3.6.1 What to include.

For additional guidance for how St Osyth Priory & Parish Trust would like you to respond, please see the recommendations below. Responses should be sent as an emailed PDF attachment.

1. **Case Studies.** To showcase yourself and/or your organisation, please include case studies covering the elements of the Role, Scope and Responsibilities as well as the schedule of services; this helps to demonstrate clearly how your previous experience contributes to your value proposition.

2. **Details of who will be involved, including Bios and CVs.** In addition to this, providing an overview of your proposed team's individual bios, their responsibilities and brief examples of relevant past work is necessary to demonstrate how well you are suited to delivering the proposed works.
3. **Community and Stakeholder Engagement.** St Osyth Priory & Parish Trust is an organisation that works with, and across, a number of varied stakeholders. Please outline how you would engage those stakeholders in this project.
4. **Methodology and Timeline.** In addition, please provide a methodology, timeline & order of outputs. Tell us how you would propose delivering against the brief, and why.
5. **References.** Please provide three referees' details and a description of similar contracts delivered over the past five years.
6. **Insurance.** Please confirm that you have:
 - a. Employer's liability insurance
 - b. £5m Professional indemnity insurance, for each and every claim
 - c. £5m Public liability insurance
 Proof of insurance will be required from the successful bidder.
7. **Social Value.** Finally, to strengthen your response further still, please provide examples of your social value.
8. **Resource estimate.**
9. **Estimated Time on project, including physical amount of time on site.**

ITT - Quality (80%)

3.7.10 This element equates to 80% of the full mark and the scoring of each element of the requirement will use the scoring system as shown in table below.

Method Statements Question	Scoring Range	Weighting
Key Project Personnel	0 to 5	
Project Execution	0 to 5	
Added Value	0 to 5	

3.7.11 The following scoring mechanism will be used to score the quality method statements responses:

Score	Rationale/Judgment	General Description
0	The response fails to comply with the requirements of this ITT or is otherwise incapable of evaluation.	Wholly unsatisfactory
1	The response does not demonstrate an understanding of St Osyth Priory & Parish Trust's requirements as defined in this ITT and is incomplete or is otherwise unconvincing in significant respects.	Unsatisfactory
2	The response demonstrates only a limited understanding of St Osyth Priory & Parish Trust's requirements as defined in this ITT, lacks detail or is not convincing in some respects	Cause for concern
3	The response demonstrates an understanding of, and compliance with St Osyth Priory & Parish Trust's requirements as defined in this ITT.	Acceptable
4	The response indicates that the bidder would effectively deliver the project in accordance with St Osyth Priory & Parish Trust's requirements. The response is convincing, detailed and demonstrates a good understanding of St Osyth Priory & Parish Trust's requirements as defined in this ITT.	Good
5	The response indicates that the bidder would effectively deliver the project in accordance with St Osyth Priory & Parish Trust's requirements. The response is entirely convincing, highly detailed and demonstrates a complete understanding of and compliance with St Osyth Priory & Parish Trust's requirements as defined in this ITT.	Excellent

3.7.12 In order to ensure that the successful Tenderer has met minimum quality standards, any Tenderer whose score includes two or more answers that are awarded a score of 2 or less, or any awarded of a score of 0, will be deemed to have failed minimum quality standards and will be deselected from the tender process.

ITT - Price (20%)

3.7.13 The pricing schedules submitted will be worth 20% of the overall marks.

The Tenderer with the lowest price will receive the maximum points available.

Each remaining Tenderers' price will be awarded a score based on the percentage difference between their price and that of the most competitive price:

Score = Lowest Tender Sum / Contractors Tender sum x Max. Weighted Available Score

Please see an illustrated example of the calculation methodology below for clarity:

Tenderer A	Tenderer B	Tenderer C	Tenderer D
15,849	17,094	25,497	31,246
20%	18.54%	12.43%	10.14%

A = 15,849 and gets 20%

A divided by B = 15,849 /17,094 = 0.927

Proportional score 20 x 0.927 = 18.54%

3.7 Interviews / Presentations

3.7.1 As part of the tender evaluation process bidders may be required to make a presentation or attend an interview online. Bidders will be notified as soon as possible if they are required to give a presentation or attend an interview. Following the presentations /interviews the scores attained in the written submission may be moderated.

3.8 Indicative Procurement Timetable

3.8.1 Below is a table of indicative timescales for the procurement process. Please note that some of these dates may be subject to change. As time is of the essence for this project, only contractors who can meet the timetable set out below should submit a tender for this service contract.

MILESTONE	TARGET DATE
Invitation to Tender (ITT) available online	28 th Feb, 2025
Formal Site Visits	Upon request, subject to availability
Deadline for receipt of ITT Clarification Questions	14th March, 2025

Tender returns: ITT Submission Deadline	28th March, 2025
Tender Evaluation Period & Interviews	28 th -31st March
Notify successful / unsuccessful bidders	4 th April
Estimated. Confirmation of contract award	14 th April

3.8.2 The above dates are for guidance only and may be amended by written notice by and at the sole discretion of St Osyth Priory & Parish Trust.

3.8.3 By submitting a tender for the provision of the Services a Tenderer confirms that it is able to meet the dates above including the provision of all necessary personnel, facilities and information to deliver the Services.