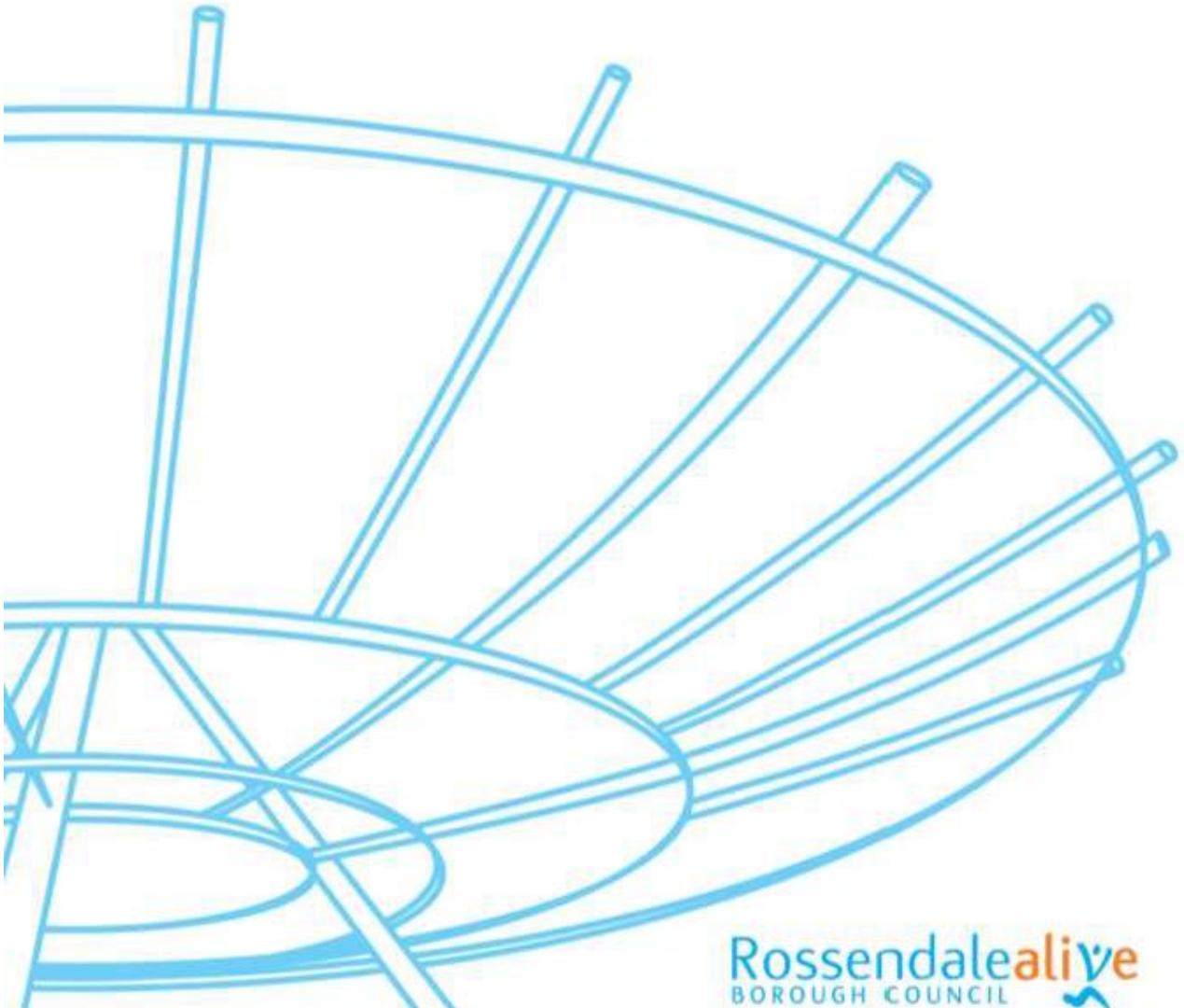


Rossendale Borough Council

INVITATION TO TENDER FOR

Project Manager – Whitaker Museum, Heritage Lottery Fund, Round One Application

INSTRUCTIONS AND DETAILS OF CONTRACT



Introduction

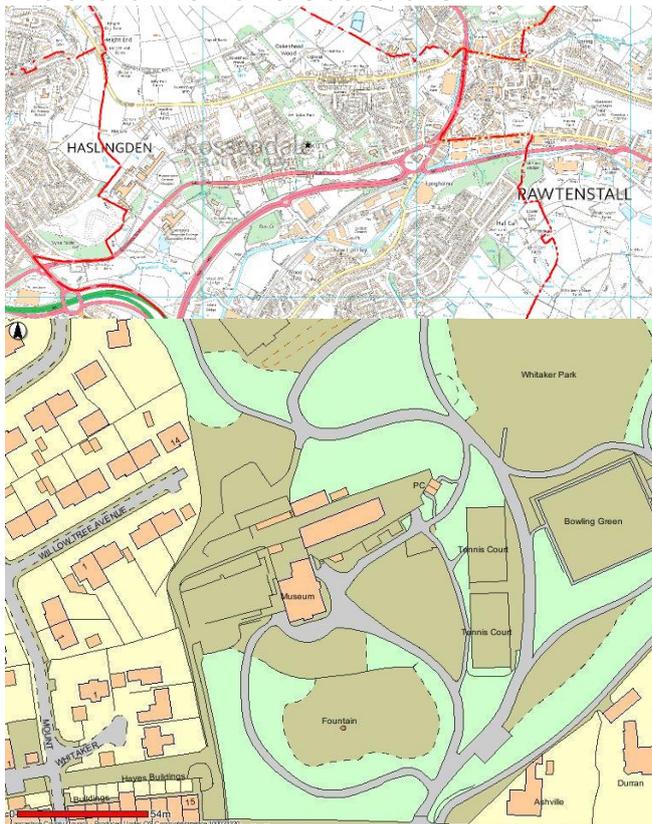
Rossendale Borough Council (RBC) is seeking tenders from competent contractors and established project managers to oversee the smooth and effective delivery of the development round 1 of the Whitaker Experience (HLF barn and stables project).

The purpose of the post in addition to the above is to oversee proposals for all capital (physical) works to RIBA Stage D. To produce a detailed, costed, Activity Plan. Pulling together key partners to ensure that deadlines are adhered to and work is of a high standard. The project manager will be the interface between Rossendale Borough Council (lead partner) and members of the Project Board. They will provide full financial management of the project in liaison with Rossendale Borough Council Finance Team to ensure that the budget is on track.

Critical to the post will be the facilitation and production of Collections Management and Maintenance Plan, Business Plan, Audience Development Plan and Collection Display Design Brief- working closely with the activity co-ordinator and the collections co-ordinator.

Area Information

The site for the works is as follows:



The Contractor must, before tendering, ascertain the nature of the location, the extent and nature of the types of work required and all local conditions and restrictions likely to affect the execution of the works. No claim at a later date will be considered on the grounds of lack of knowledge of conditions of access, or nature of the area. The Contractor shall be deemed to have obtained for itself all necessary information as to risks and any other circumstances which might reasonably influence or affect the Contractor's tender.

Rossendale Borough Council

SUMMARY INSTRUCTIONS AND DETAILS OF CONTRACT

ITEM	CONTRACT DETAILS
Contract Description:	<p>Rossendale Borough Council (RBC) is seeking tenders from established project managers to oversee the smooth and effective delivery of the development phase of the Whitaker Experience (barn and stables project).</p> <p>To oversee the development of proposals for all capital (physical) works to RIBA Stage D. To produce a detailed, costed, Activity Plan. Pulling together key partners to ensure that deadlines are adhered to and work is of a high standard. The project manager will be the interface between Rossendale Borough Council (lead partner) and the architects. They will provide full financial management of the project in liaison with Rossendale Borough Council Finance Team to ensure that the budget is on track.</p> <p>Critical to the post will be the facilitation and production of Collections Management and Maintenance Plan, Business Plan, Audience Development Plan and Collection Display Design Brief- working closely with the activity co-ordinator and the collections co-ordinator.</p> <p>The Contractor shall be deemed to have satisfied itself before submitting its tender as to the accuracy and sufficiency of the rates and prices stated in the tender which shall (except in so far as is otherwise provided in the Contract) cover all the Contractor's obligations under the Contract and the Contractor shall be deemed to have obtained for itself all necessary information as to risks and any other circumstances which might reasonably influence or affect the Contractor's tender.</p>
Insurance Requirements:	All adequate insurance to run alongside the contract as required. Please submit certificate of public liability insurance.
Completion of Contract:	Target date of 1 st August 2018
Procuring Officer:	Any queries must be addressed to; Guy Darragh Rossendale Borough Council Operations Team Bacup

	<p>OL13 0AR, Tel:- 01706 252501, email: guydarragh@rossendalebc.gov.uk</p> <p>Before close of tender</p>
Submission instructions:	<p>Provide copy of the tender document in envelope marked “Tender-Strictly Confidential – Whittaker Barn and Stables project to be opened by addressee only.”</p> <p>The envelope must bear no name or other distinguishing matter or mark revealing the identity of the sender. Tenders to be sent to address below:</p>
Tenders to be sent to:	<p>guydarragh@rossendalebc.gov.uk (solely use this email for tenders using title- HLF Whitaker PM Tender).</p>
Date/time for Tender return:	<p>Monday 31st July 2017 12 noon.</p>

Timetable

This timetable is indicative only. The Council reserves the right to change it at its discretion.

Stage	Date(s)/time
Issue of Invitation to Tender	14/07/17
Submission of Tenders	31/07/17 12 noon
Evaluation of Tenders	31/07/17 pm
Notification of result of evaluation	1st August 2017
Interview Date @ Whitaker Museum	4th August 2017
Contract commencement	TBA
Completion Date	1 st August 2018

*agreed 'snagging' and season dependant re-instatement will be permitted after this deadline at discretion of the Project Manager.

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CHECKLIST FOR TENDERERS

Failure to provide all of the items in the checklist may cause your Tender to be non-compliant and not considered.

No	Item	Included in Tender?
1.	Fixed price as well as full methodology	
2.	Recent References x 2 and CV	

IMPORTANT NOTICE

This Invitation to Tender (“ITT”) is issued to those who wish to tender (“Tenderers”) to Rossendale Borough Council (the “Council”) to undertake (the “Contract”), their professional advisers and other parties essential to preparing a tender for this Contract (the “Tender”) and for no other purpose.

The contents of this ITT and of any other documentation sent to you in respect of this tender process are provided on the basis that they remain the property of the Council and must be treated as confidential. If you are unable or unwilling to comply with this requirement you are required to destroy this ITT and all associated documents immediately and not to retain any electronic or paper copies.

No Tenderer will undertake any publicity activities with any part of the media in relation to the Contract or this ITT process without the prior written agreement of the Council, including agreement on the format and content of any publicity.

This ITT is made available in good faith. No warranty is given as to the accuracy or completeness of the information contained in it and any liability or any inaccuracy or incompleteness is therefore expressly disclaimed by the Council and its advisers.

The Council reserves the right to cancel the tender process at any point. The Council is not liable for any costs resulting from any cancellation of this tender process nor for any other costs incurred by those tendering for this Contract.

You are deemed to understand fully the processes that the Council is required to follow under relevant European and UK legislation, particularly in relation to The Public Contracts Regulations.

1. **BACKGROUND**

1.1 Further details of the Council's needs under the Contract and other relevant information is provided in the Specification at ITT Schedule 1

1.2 If you have any questions or require any clarifications, please contact

Mr Guy Darragh (Economic Development Manager),
Rossendale Borough Council

Tel	01706 252568
Email	Guydarragh@rossendalebc.gov.uk

1.3 Other than the person or persons identified above, no Council employee or member of the Council has the authority to give any information or make any representation (express or implied) in relation to this ITT or any other matter relating to the Contract.

1.4 Please note that the Council's responses to any queries or clarification requests may, at the Council's discretion, be circulated to all Tenderers.

1.5 The Council reserves the right to issue supplementary documentation at any time during the tendering process to clarify any issue or amend any aspect of the ITT. All such further documentation that may be issued shall be deemed to form part of the ITT and shall supplement and/or supersede any part of the ITT to the extent indicated.

1.6 Tenderers must obtain for themselves at their own expense all information necessary for the preparation of their Tenders.

1.7 Under the Contract the Council will require compliance with its policies. Tenderers are advised to satisfy themselves that they understand all of the requirements of the Contract before submitting their Tender.

1.8 The Tender must be received in accordance with the relevant instructions no later than the time and date indicated.

1.9 This phase of the project is expected to be completed within 12 months

1.10 A project plan will be produced by the Project Manager and payment will be made in agreed stages following successful completion of works on an invoice basis. The final 20% of this contract award will be retained until the completion of the second round application to the quality satisfaction of the Economic Development Manager.

1.11 This Project Manager contract is not expected to exceed the value of £15,000.

1.12 This tender is only for round one of the HLF bid.

2. **TENDER SUBMISSION REQUIREMENTS**

- 2.1 Tenders must be written in the English language.
- 2.2 Tenders must provide responses referring back to the numbering format as set out in section 5 of this ITT.
- 2.3 Only one Tender is permitted from each Tenderer. In the event that more than one is submitted by a Tenderer, the one with the latest time of submission will be evaluated and the other(s) disregarded.
- 2.4 The Tender (including price) should remain valid for a minimum period of 90 days.
- 2.5 The Tender must not be qualified in any way.
- 2.6 Any signatures must be made by a person who is authorised to commit the Tenderer to the Contract.
- 2.7 Your full registered business/name and main office address must also be provided on all documents.

3. **CONTRACT DOCUMENTS**

3.1 This Council is bound by procurement rules and cannot enter into any negotiations on the Tender or Contract.

3.2 Any contract award will be conditional on the Contract being approved in accordance with the Council's internal procedures and the Council being generally able to proceed and may allow for a standstill period to elapse before sending confirmation of contract award to the successful Tenderer.

4. **TENDER EVALUATION AND AWARD CRITERIA**

- 4.1 The Council does not undertake to accept the lowest or any Tender and reserves the right to accept the whole or any part of any Tender submitted.
- 4.2 Each Tender will be checked initially for compliance with all requirements of the ITT.
- 4.3 Tenders will be evaluated against the award criteria set out below.
- 4.4 During the evaluation period, the Council reserves the right to seek clarification in writing or by means of a clarification meeting from any or all of the Tenderers, to assist it in its consideration of their Tenders.
- 4.5 The Council may decide to interview Tenderers or hold clarification meetings to assist its tendering process, and Tenderers will be notified in due course.
- 4.5.1 Tenderers are requested to attend for interview on the 4th August 2017.
- Such interviews shall be used to provide clarification and will be taken into account in the evaluation process.
- 4.5.2 Tenderers will be notified of individual interview times by 1st August 2017.
- 4.5.3 The award of the tender will be at the sole discretion of Rossendale Council in partnership with the Project Board.
- 4.6 Tenders will be evaluated taking into consideration the following award criteria:

The criteria are:

- (a) Value for money (40%)
- (b) Fulfilling the requirements of the brief (40%)
- (c) Ability to work with other contractors and deliver the project within the timescales (10%)
- (d) References from previous projects undertaken (10%)

5. **INFORMATION REQUIRED**

It is not our intention to make the tendering process too onerous on organisations. We would expect Tenders to provide:

5.1 **Tender information**

- 5.1.1 A proposed operational and management structure;
- 5.1.2 Detail of previous experience in managing similar properties / tenants;
- 5.1.3 Approach to working with partnership organisations;
- 5.1.4 Areas highlighted through this briefing document in terms of the types of issues that you may encounter during the management period; and
- 5.1.5 Assumed costs you have identified to support your business model.

5.2 **Pricing**

5.3 Tenderers must complete a Pricing Schedule that set out all methodology and obligations under the Contract. Clear price for all works must be stated.

5.4 All Prices shall be stated in pounds sterling and exclusive of VAT.

6. **FREEDOM OF INFORMATION ACT AND ENVIRONMENTAL INFORMATION STATEMENT**

- 6.1 The Council is subject to The Freedom of Information Act 2000 ("Act") and The Environmental Information Regulations 2004 ("EIR").
- 6.2 As part of the Council's obligations under the Act or EIR, it may be required to disclose information concerning the procurement process or the Contract to anyone who makes a reasonable request.
- 6.3 If Tenderers consider that any of the information provided in their Tender is commercially sensitive (meaning it could reasonably cause prejudice to the organisation if disclosed to a third party) then it should be clearly marked as "**Not for disclosure to third parties**" together with valid reasons in support of the information being exempt from disclosure under the Act and the EIR.
- 6.4 The Council will endeavour to consult with Tenderers and have regard to comments and any objections before it releases any information to a third party under the Act or the EIR. However the Council shall be entitled to determine in its absolute discretion whether any information is exempt from the Act and/or the EIR, or is to be disclosed in response to a request of information. The Council must make its decision on disclosure in accordance with the provisions of the Act or the EIR and can only withhold information if it is covered by an exemption from disclosure under the Act or the EIR.
- 6.5 The Council will not be held liable for any loss or prejudice caused by the disclosure of information that:
- 6.5.1 Has not been clearly marked as "Not for disclosure to third parties" with supporting reasons (referring to the relevant category of exemption under the Act or EIR where possible); or
- 6.5.2 Does not fall into a category of information that is exempt from disclosure under the Act or EIR (for example, a trade secret or would be likely to prejudice the commercial interests of any person); or
- 6.5.3 In cases where there is no absolute statutory duty to withhold information, then notwithstanding the previous clauses, in circumstances where it is in the public interest to disclose any such information.

Annex 1 - Principal Duties

The Project Manager is directly responsible to RBC as the application lead, namely the economic development manager who will be working closely on the project, with support from Task and Finish Group.

- 1.1. To manage the finances for the development and delivery phases of the project, ensuring the project is delivered on budget.
- 1.2. To manage the project timeline, ensuring the project is delivered on time.
- 1.3. To ensure that all invoices are checked and paid on time.
- 1.4. To manage the cash flow for the project, drawing down funds from funders at timely intervals.
- 1.5. To maintain clear and concise records of all financial aspects of the project, including actual and projected cash flows.
- 1.6. To meet regularly with the architect and contractors to ensure the appropriate delivery of the project and management of the site.
- 1.7. To facilitate monthly meetings of the project Board (task + finish group)
- 1.8. To ensure efficient reporting back to Rossendale Borough Councils Economic Development Manager, to allow a timely second round application to the HLF. To produce the second round HLF application to a high and detailed standard as well as all financial and technical documentation.

Annex 2 - Project Manager Requirements

Criteria	Essential	Desirable
Qualifications	Degree and/or appropriate professional qualification or qualification by experience. Project Management System Qualification (eg. PRINCE)	
Knowledge And Experience	Knowledge and understanding of managing capital projects and their finances.	Have experience of project management in a heritage arts and/or cultural setting Recent experience of managing finances for a major project Recent experience of delivering a capital building project
Technical And Applied Skills	Proven IT skills (proficient in Microsoft Office, all applications) Good communication skills – written and verbal An ability to build good working relationships, and to undertake delicate negotiations robustly and sympathetically Well organised, efficient with careful attention to detail	
Personal Attributes	Ability to offer flexibility in working hours to meet the needs of the project	

Annex 3 - Project Structure

