

Appleby Town Council
Tender Brief for Consultancy Services



Project Development and Repair Work
The Moot Hall
Appleby in Westmorland

Date of Issue:	V3 12:20
Prepared by:	Appleby Town Council
Email:	Clerk@applebytown.org.uk

Introduction

Appleby is a historic market town set within the District of Eden within Cumbria. Eden District Council, with significant support from Appleby Town Council, led on a successful bid to Historic England to become a heritage Action Zone (HAZ), one of the first to achieve such an accolade in the North West. The HAZ is a partnership between Eden District Council, Appleby Town Council and Historic England.

One, if not the main flagship projects of the project, is focussed on the Moot Hall. The Moot Hall is a grade I listed building, owned by Appleby Town Council. It stands proudly in the centre of Town and is highly valued by the residents and visitors alike. The Hall dates from the C15. The C17th took the hall through civic modifications with a raised roof and additional inserted roof timbers dating back to 1666. Within the Upper Hall (in the South range), improvements relate to the use of the Hall for the Westmorland Assizes held between 1670-1773. The C19th saw the Lower Hall converted into shop units with the distinctive bow fronted shop display window. The C20th saw the external flight of stairs to access the Southern Council Chamber, considerable internal refurbishment and modification including the fitting out of the Mayoral Parlour and the Tourist Information Centre.

This building is of solid masonry with a traditional rubble stone wall with ashlar quoins to the corners, the South range could also be cornered with quoins but the cementitious render obscures the junction of the two buildings.

The building is now in urgent need of significant repairs to ensure it remains a well-loved and valued asset of the local community and the significant visitor numbers who come to the town each year.

Appleby Town Council has been successful in securing grant funding from Historic England for project development costs as well as an in principle grant offer to undertake the repair works.

As such Appleby Town Council is leading on the appointment of a conservation architect who is able to carry out a detailed condition survey, draw up a costed repairs schedule and oversee the careful restoration and repair of elements of the building.

Due to the historic nature of our building we wish to appoint a conservation-accredited architect. The Architect to be appointed must be Accredited in Building Conservation (AABC) or an architect accredited with the RIBA at the upper SCA level due to the grant requirements of part of the funding from Historic England.

The last condition survey and schedule of repairs was prepared in 2016. This now requires review and an up to date survey carried out to inform urgent repairs. The main element of this project is anticipated to be the removal of the failing cementitious render and its replacement with a lime rough cast, along with other urgent works to bring the building back into a state of good, sustainable repair.

There has already been a measured building survey commissioned, and the survey drawings will be made available in CAD format to the successful team.

2. Professional Services

The Council is seeking to appoint a suitably qualified and experienced professional team to provide the following services at The Moot Hall, Appleby.

Stage 1

- Preparation of a costed condition survey to inform a detailed schedule of repairs
- Preparation of a costed Maintenance Plan

Stage 2

- Preparation of design, specification and schedules
- Submission of listed building consent(s)
- Assistance with procurement and contractor selection
- To appoint sub consultants and other specialists as required for the preparation of the above, and to coordinate their input

Stage 3

- Contract administration and supervision for works on site.

The available budget for Stage 1 and 2 combined is £25,500.

STAGE 1.

Condition survey and Maintenance Plan

Condition Survey and Report

A full condition survey of the building is required, internally and externally and a report to be produced incorporating recommendations, budget costs and setting out a prioritised forward plan for repairs and future maintenance. Where parts of the building can only be inspected by intrusive means or during restoration itself, these should be clearly identified and costed appropriately. The survey is required to guide a package of repairs that will inform the design proposals in support of the application for Listed Building Consent and the Historic England Grant application.

For each item identified on the recommendations for repair, a cost estimate should be provided. Due to the Historic Nature of the building's fabric, it is important that an estimate of costs is prepared that is based on expert knowledge/experience, so that the costs are neither underestimated nor exaggerated. Evidence may be required from other similar projects to demonstrate value for money is being achieved.

Further investigations, opening up, analysis and specialist surveys should be included in the recommendations and costed along with the repair needs.

The format of the report shall be agreed with the client in advance. Annotated drawings of defects should be prepared to accompany the condition survey report. Please allow for one meeting with Appleby Town Council to review the report. The survey and report shall assimilate the findings of recent reports in respect of fire safety, asbestos, gas safety and the condition of electrical installations where already available. It is not part of this condition survey to include service engineer's inspections.

Please **include** in your fee proposal the costs of any specialist consultants to enable the preparation of the costed condition report (e.g. a suitably experienced cost consultant/quantity surveyor and/or structural engineer).

Please **include** in your fee proposal the costs of any specialist access or inspection equipment that may be required for the site survey works and explain the proposed approach in your submitted method statement.

Maintenance Plan

The report should recommend a routine maintenance plan and an estimated cost of the maintenance where appropriate. Please set out within the maintenance plan the level of expertise and skill that may be required to carry out such maintenance tasks that will be required in order for Appleby Town Council to be able to budget for the works accordingly.

STAGE 2.

Preparation of design, specification and schedules

Following completion of Stage 1, the consultant team will be required to prepare documentation for an urgent works package of repairs that will fit within the construction budget already pre-defined by Historic England and suggested as within the region of circa £170,000 +VAT.

The team shall:

1. Provide all design drawings, specification, schedules, pricing documents and all other contract documentation necessary for the Council to obtain competitive tenders for the repair and conservation work.
2. Advise on the commission of any additional surveys and reports and provide briefs for such work.
3. Submit listed building consent(s) and any other consents that may be required
4. Act as Principle Designer under the CDM regulations
5. Work with the Town Council to issue all information for tender
6. Assist with the quality assessment and procurement of suitable contractors competent in working on historic buildings.

STAGE 3.

Construction phase

Following a successful tendering process, it is intended that the consultant team will oversee the works on site, providing full contract management and cost consultancy services throughout to completion. Given the nature of the works, the on-site works will account for 50% of a percentage fee.

Please provide a percentage fee that would cover this element of work, based on a contract sum of up to £170,000 +VAT.

3. Submission requirements

Your submission must include the following information in response to this tender:

- Methodology
 - That explains your approach to the project condition survey and the on-going delivery of each phase of work. This should include how the work will be programmed and the estimated costs of each phase, the specialists that will be used broken down into days and their specific day rates for professional services.
 - This should include projected timescales and milestones and explain the frequency and means of involving and reporting to the client team.
- Expertise and Experience
 - Details of your previous experience in managing repair/restoration projects for designated heritage assets.
 - Details of Project Team structure including qualifications, conservation accreditation if relevant, and experience of personnel responsible for delivering the project.
- Project examples
 - examples of three projects of similar scale and complexity that have been completed on time and within set budgets, including photographs/illustrations
- Price (see pricing schedule)

The selection process will be based on a simple quality (60%) and price (40%) assessment.

A panel will evaluate all information provided within the submissions according to a set of criteria as listed below with weighting scores:

Criterion	Weighting
Methodology and understanding the needs of the client	20%
Expertise and experience of repair/restoration projects	20%
Three project examples of similar completed projects	20%
Price	40%

Quality assessment (60%)

Quotation submissions will be evaluated against the above quality criteria using the scoring rationale as follows:

Score	Weighting
5 Points	Meets the requirements/expectations as specified and provides a strong level of confidence that the project will be completed on time and in budget.
4 Points	Generally meets the requirements/expectations in most aspects of the project, a level of confidence is provided that the project will be completed on time and in budget
3 Points	Meets the requirements/expectations in some aspects but there are elements of concern in some of the information submitted.
2 Points	Meets a limited number of the requirements/expectations but fails to provide sufficient confidence the project brief could be completed in time and on budget.

1 Points	Significantly fails to meet the requirements/expectations of the project brief and there is little confidence the project could be completed in time and on budget.
0 Points	No response. Does not meet the requirements/expectations.

The response to each question (where marks are available) will be scored out of 5. A multiplier (the weighting) will then be applied to give the final score.

Price assessment (40%)

The price assessment will be based on the lump sum fee costs for Stage 1 and 2 combined with the fee for Stage 3. We will use the percentage fee provided for Stage 3 to calculate the expected cost for Stage 3 based on the estimated £170,000 +VAT construction costs. These figures will be added together to form an overall cost.

The lowest cost submission will achieve the full available marks. Marks received by bidders for more expensive cost submissions will be reduced by their proportionate difference to the lowest cost.

A maximum of 400 points will be awarded for price out a total 1,000 points. The table below illustrates how the total sum of the amount quoted will be converted to a score for each Bidder.

		Cost Scores				
Description	Formula	Worked Example				
		B1	B2	B3	B4	B5
Whole System Cost	A	£500	£622	£425	£440	£625
Lowest Cost	B	£425				
Calculation	$C = B \div A$	0.85	0.68	1.00	0.97	0.68
Convert to Points	$D = C \times 400$	340	272	400	388	272

4. Form of Quotation

I/We, the undersigned, Quote and offer to provide the services referred to in the Project Brief supplied to me/us for the purpose of providing a quotation.

Attached to this Form of Quotation are the following:

- My/our response to Project Brief.
- The completed Pricing Schedule.
- A signed Certificate of Non-Collusion.

I/We confirm that we accept the appointment a set out in the Project Brief.

I/We understand that the Client reserves the right to accept or refuse this Quotation whether it is lower, the same, or higher than any other Quotation.

I/We confirm

- that the information supplied to you and forming part of this Quotation remains true and accurate in all respects.

I/We confirm that this Quotation will remain valid for 90 days from the date of this Form of Quotation.

I/We confirm and undertake that if any of such information becomes untrue or misleading that I/we shall notify you immediately and update such information as needed.

I/We confirm that the I/we are authorised to commit the Bidder to the obligations contained in the Project Brief.

Named Individual	
Signature	
In the Capacity of	
For and on Behalf of	
Address	
Telephone Number	
Date	

Pricing schedule

Please note you may format this section to accommodate your responses and include attachments in electronic format where appropriate (please reference these attachments). Alternatively, you may submit a separate document providing that each of the sections below appears separately within in it.

The submitted fixed price fee for the proposal (to include expenses) will be fixed for the duration of the contract.

Stage 1: Fee Proposal (Fixed Fee)

All fees should be inclusive of travel, subsistence, and out-of-pocket expenses etc.

Condition survey & maintenance plan TASK:	Consultant	Cost Break Down excluding VAT
	Architect / Lead Consultant	£
	Quantity Surveyor	£
	Structural Engineer	£
	Other	£
Total		£

Stage 2: Fee Proposal (Fixed Fee)

Based on the estimated £170,000 +VAT construction contract sum

All fees should be inclusive of travel, subsistence, and out-of-pocket expenses etc.

Detailed proposals and tender TASK:	Consultant	Cost Break Down excluding VAT
	Architect / Lead Consultant	£
	Quantity Surveyor	£
	Structural Engineer	£
	Principle Designer	£
Total		£

Stage 3: Fee Proposal (Percentage)

Please provide a fee percentage for full services (*full team*) to oversee works on site based on the estimated £170,000 +VAT construction contract sum.

Please indicate if your fee percentage would change should the estimated construction sum increase or decrease following the condition survey, and at what cost level this change would take place. If no other information is provided then we will assume that your fee percentage remains the same irrespective of the final cost.

Construction cost	Fee %
£170,000 + VAT	

Please provide each consultant's day rate below.

Consultant	Day rate excluding VAT

Other: Expenses and Disbursements (outwith costs included above)		
O1.	Mileage rate (per mile)	£
O2.	Printing	£
O3.	Other (please itemise)	£

Certificate of Non-Collusion

Statement of non-collusion

The essence of competitive quoting is that the client shall receive bona fide competitive quotes from all consultants.

In recognition of this principle, I/we certify that this is a bona fide offer, intended to be competitive and that I/we have not fixed or adjusted the amount of the offer in accordance with any agreement or arrangement with any other person (except any sub-contractor identified in this offer).

I/we also certify that I/we have not done, and undertake that I/we will not do, at any time any of the following acts:

- a) communicate to a person other than the Client, the amount or approximate amount of my/our proposed offer except where the disclosure in confidence of the approximate value of the Quotation was essential to obtain insurance premium quotations required for the preparation of the Quotation; or
- b) enter into any agreement or agreements with any other person that they shall refrain from tendering or as to the amount of any offer submitted by them; or
- c) offer or agree to pay or give or actually pay or give any sum of money, inducement or valuable consideration, directly or indirectly, to any person for doing or having done or having caused to be done in relation to any other offer or proposed offer, any act or omission.

I/we agree that the Client may, in its consideration of the offer and in any subsequent actions, rely upon the statements made in this Certificate.

Signed by:

Signature:	
Name:	
Position:	
For and on behalf of:	

Instructions to tenderers

Nothing in the enclosed documentation or appendixes, or any other communication made between Appleby Town Council and any other party, can be considered a contract or agreement at this stage.

All correspondence in relation to this tender, including request to visit the site and for tender submissions, should be sent by email to:

Karen Lowthrop
Town Clerk
Moot Hall
Appleby-in-Westmorland

Email: clerk@applebytown.org.uk

Tender timetable

Tender Stage	Dates
Invitation to Tender Issued	14 December 2020
Deadline for Tender queries	24 December 2020
Deadline for Tender Submissions	10am on Thursday 7 th January 2021
Interviews (if required)	Week beginning 4 January 2021
Tender Award	By Monday 11 January
Stages 1 and 2 Completion	31 March 2021
Stage 3 Completion	October 2021

The Consultants with the highest scores may be invited to an informal interview with the panel to discuss their quotation submissions and any points of clarification.

Karen Lowthrop
Town Clerk
Moot Hall
Boroughgate
Appleby in Westmorland
Cumbria
CA16 6PL
017683 51177
clerk@applebytown.org.uk